DAILY MORNING REPORT

Friday, August 14, 2026

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TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Bearish candle with decrease in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 23769
- Crucial moving average of 20/50 SMA are at 24321 and 24065
- 200 SMA trend deciding level exist at 24738

Indian Equity Market Performance

Indian equity markets cut early losses to end mixed on Thursday. Investors heaved a sigh of relief as cooling U.S. inflation prompted bets the Federal Reserve would leave its policy rate unchanged at its September meeting.

Sectoral Front Performance

On the Sectoral front the Nifty Metal index declined 1% and Private Bank index fell 0.5%, while Realty gained 1% and Consumer Durables rose 0.45%.

Technical Analysis

Nifty 50 ended with a small-bodied bearish candle and a noticeable lower wick on the daily charts, signalling buying interest at lower levels despite continued range-bound trading. The index remained within the previous session's range and successfully defended its 20-day EMA at 24,360 for the second consecutive day, highlighting resilience around the crucial support zone. While Nifty continues to trade above all key moving averages, keeping the broader trend favourable for bulls, momentum indicators point to weakening strength. The RSI slipped to 53.33 with a negative crossover, while the MACD maintained a bearish crossover. A sustained break below 24,360 could trigger a decline towards 24,300–24,200, with 24,000 emerging as the next major support. On the upside, the 24,500–24,600 zone remains a crucial hurdle. Until a breakout occurs, consolidation is likely to persist. Meanwhile, India VIX fell 2.33 percent to 11.42, its lowest close since January 16, 2026, signalling easing near-term uncertainty.

Option Activity

On option front, maximum Put OI is at 24300 followed by 24400 strike, while maximum Call OI is at 24500 followed by 24600 strike. Call writing was seen at 24600 strike, followed by 24500 strike while Put writing was seen at 24350 strike, followed by 24300.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	53840	69.7	0.13
Nasdaq	26803	214.5	0.81
S&P 500	7799	50.5	0.65
FTSE 100	10773	-60.5	-0.56
DAX	26300	-31.3	-0.12
Hang Seng	25198	-199.0	-0.78
Nikkei	68894	585.4	0.86
Sensex	78080	113.6	0.15
Nifty	24396	-40.1	-0.16

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,370.30	50.10	1.13
Silver ($/Oz)	64.02	0.97	1.50
Brent Crude ($/bl)	86.81	0.26	0.30
Dollar Index	99.80	-0.05	-0.05
USD/INR	95.38	-0.06	-0.06
USD/YEN	159.40	-0.10	-0.06
EUR/USD	1.15	0.00	0.06

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	76773	77598	78080	78423	78918
Nifty	24000	24250	24396	24500	24650
Nifty Fut	24072	24322	24468	24572	24722

Pivot Level	
Sensex	77955
Nifty	24380

ECONOMY NEWS

China will continue imposing anti-dumping duties on single-mode optical fibre imports from India for another five years starting on Friday, the commerce ministry said on Thursday. (BS)

India's exports increased by 19.63 per cent to $44.24 billion in July, even as the trade deficit widened to $31.98 billion. Imports rose by about 17.52 per cent to $76.22 billion in July. During April-July this fiscal, exports jumped 17.04 per cent to $173.78 billion, and imports climbed 19.27 per cent to $292.38 billion. (BS)

India's state-owned refiners are in talks to secure more US liquefied petroleum gas under annual contracts for next year as the world's biggest consumer of the cooking fuel seeks to diversify imports. (BS)

India is concerned about a bipartisan US Senate Bill that could expose it to punitive tariffs of up to 100 per cent over its purchases of Russian oil, but a government official said ongoing trade negotiations with Washington have been "reassuring". (BS)

A sharp rise in imports in July pushed up India's trade deficit for the month to a six-month high of $31.98 billion even as both merchandise exports and imports hit their second-highest levels in the same period, according to the data from commerce-ministry data released on Thursday. (BS)

The Uttar Pradesh government has allocated ₹15,400 crore for multiple expressway projects, majority of which shall be utilised on land acquisition for these mega projects crisscrossing the eastern and western districts of the landlocked state. (BS)

Most sugar mills in the country are unlikely to advance the crushing season by 15 days to October despite industry bodies promising the government they would do so to ease record-high sugar prices, senior industry officials said. (ET)

The central government's ability to service debt has remained positive and the pace of accumulation of its loans between FY23 and FY25 was less than the nominal gross domestic product expansion, according to a CAG report. This indicates that "the economy has grown to be able to absorb and service the accumulated debt", it said in a report. (ET)

CORPORATE NEWS

Larsen and Toubro had secured an order worth up to ₹15,000 crore ($1.57 billion) from U.S.-based cloud platform Together AI to host an AI data centre using Nvidia's high-performance chips.

Bharat Heavy Electricals (BHEL) has entered into a strategic tie-up with Norway-based Hystar AS to enable phased indigenisation and local manufacturing of PEM electrolyser systems for green hydrogen projects in India.

Narayana Health has entered into a knowledge-sharing partnership with the New Development Bank (NDB), under which it will help the multilateral lender and its member countries strengthen smart hospital capabilities and adopt efficient, technology-enabled and patient-centric healthcare services.

Utkal Alumina International (UAIL), a subsidiary of Hindalco Industries, has secured Aluminium Stewardship Initiative (ASI) Performance Standard Certification for its Baphlimali bauxite mine in Odisha's Rayagada district.

Waaree Energies has entered into a Joint Venture Agreement with SmartenGrand Ltd. to establish a semiconductor fabrication unit in India including power application diodes. This strategic move signifies Waaree's diversification into the advanced semiconductor manufacturing sector, leveraging technological expertise and market presence.

Aditya Birla Real Estate announced its entry into the Navi Mumbai market with the redevelopment of Shiv Sai Co-operative Housing Society in Vashi, undertaken jointly with an affiliate of Priyanka Group. The project has a total revenue potential of approximately Rs 2,600 crore.

Stove Kraft has established a wholly owned subsidiary and a joint venture in China to strengthen its supply chain and manufacturing. This move aims for backward integration to improve quality and costs for its cookware segment.

An existing shareholder is likely to sell a 6% stake in Piramal Pharma through block deals, with the offer size estimated at around Rs 1,750 crore, reports CNBC-TV18, quoting sources.

DCX Systems' JV, ELTX Systems, signed an additional non-binding MoU with the Tamil Nadu government. The MoU is aimed at expanding the JV's proposed operations in Tamil Nadu, providing potential future growth.

BULK DEALS

- **Thyrocare Tech Ltd:** Docon Technologies Private Limited Sell 13168657 Shares @ Rs. 624
- **Urban Company Limited:** Sbi Mutual Fund Buy 31500022 Shares @ Rs. 136
- **Urban Company Limited:** Accel India Iv (Mauritius) Limited Sell 20000000 Shares @ Rs. 136
- **Thyrocare Tech Ltd:** Hsbc Mutual Fund Buy 2999731 Shares @ Rs. 624
- **Thyrocare Tech Ltd:** Kotak Mahindra Life Insurance Company Limited Buy 2400000 Shares @ Rs. 624
- **Urban Company Limited:** Vycl1 Limited Sell 9631437 Shares @ Rs. 136
- **Thyrocare Tech Ltd:** Dsp Mutual Fund Buy 1321363 Shares @ Rs. 624
- **Thyrocare Tech Ltd:** Icici Prudential Mutual Fund Buy 801000 Shares @ Rs. 624
- **Ultracemco:** Pilani Investment And Industries Corporation Limited Sell 2500000 Shares @ Rs. 11585
- **Urbanco:** Bessemer India Capital Holdings Ii Ltd Sell 12143500 Shares @ Rs. 140.15

INSIDER TRADE

Acquisition

- * Dee Development Engineers Ltd: Krishan Lalit Bansal, Promoter and Director, Acquisition 796812 shares on 29-Jul-26
- * T T Ltd-$: Promoter Group, Acquisition 91587 shares on 12-Aug-26
- * Hi-Tech Pipes Ltd: Promoter Group, Acquisition 9000000 shares on 07-Aug-26
- * Trualt Bioenergy Ltd: NIRANI HOLDINGS PRIVATE LIMITED, Promoter Group, Acquisition 20000 shares on 12-Aug-26
- * Ncc Ltd: Sirisha Projects Private Limited, Promoter, Acquisition 442855 shares on 10-Aug-26
- * Ncl Industries Ltd-$: Promoter, Acquisition 9094 shares on 12-Aug-26

Disposal

- * Metropolis Healthcare Ltd: Promoter Group, Disposal 2100000 shares on 11-Aug-26
- * Sterlite Technologies Ltd: Navin Agarwal, Promoter Group, Disposal 2500 shares on 13-Aug-26
- * Thyrocare Technologies Ltd: Docon Technologies Private Limited, Promoter, Disposal 15769696 shares on 13-Aug-26
- * Kaiser Corporation Ltd: Promoter, Disposal 1465957 shares on 12-Aug-26
- * Divis Laboratories Ltd: Divi Madhusudana Rao, Promoter Group, Disposal 20000 shares on 11-Aug-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
ASTRAL	1,592.0	8.7%	GSPL	268.4	-7.1%
SOLARINDS	20,325.0	8.5%	PWL	117.6	-5.1%
NETWEB	5,193.0	7.4%	CPPLUS	3,704.2	-5.0%
GPIL	243.4	6.3%	PAGEIND	36,510.0	-4.7%
SARDAEN	518.0	5.8%	NATIONALUM	401.0	-4.5%
BHARTIHEXA	1,568.0	5.5%	APARINDS	17,238.0	-4.2%
CYIENT	879.0	4.6%	JBCHEPHARM	2,408.9	-3.9%
CONCOR	535.0	4.5%	FORCEMOT	18,525.0	-3.9%
NATCOPHARM	954.0	4.2%	SAIL	167.7	-3.6%
IFCI	76.5	4.1%	BALKRISIND	2,409.9	-3.5%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	16,565.14	12,212.05	4,353.09
FII	14,492.46	15,003.15	-510.69

Category	13-Aug-26	12-Aug-26	11-Aug-26	10-Aug-26	07-Aug-26	06-Aug-26
DII	4,353.09	5,841.66	24.77	-1,290.29	235.56	4,013.60
FII	-510.69	-1,002.50	258.55	1,974.76	480.24	-17.86

DAILY MORNING REPORT

Friday, August 14, 2026

DERIVATIVE REPORT

- Nifty declined by 0.16% with Nifty future added 2.26 lakh shares in open interest and stock
- Stock future added 952.0 Lakh shares in open interest.
- Nifty PCR increased to 0.92 from 0.91
- Total Nifty Calls added 325.2 lakh shares in open interest.
- Total Nifty Puts added 305.4 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 25000 and 24000 put.
- FII's sold net Rs. 510.69 Cr (provisional), while DIIs bought net Rs. 4,353.09 Cr in cash market
- FII sold net Rs. 14150.03 Cr in F&O
- Securities in Ban Period: - BANDHANBNK, LICI, MANAPPURAM, SAIL

NIFTY TRACKER

	13-Aug-26	12-Aug-26	11-Aug-26	10-Aug-26
Spot	24,395.9	24,436.0	24,471.7	24,583.8
% Change in Spot	-0.16%	-0.15%	-0.46%	0.05%
Nifty(FUT) Aug.	24468.0	24470.5	24540.5	24659.7
Nifty(FUT) Aug. Vol.	21683	46992	25675	17424
Nifty(FUT) Aug. - OI	12714650	12562810	12123995	12120095
Nifty(FUT) Sept.	24602.0	24602.9	24674.1	24790.9
Nifty(FUT) Sept. Vol.	3541	6585	3061	2238
Nifty(FUT) Sept. - OI	1587430	1528540	1405690	1309685

TRADE STATISTICS FOR 13-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	8,25,905	58,37,767	-
Index Options	4,42,33,513	19,47,070	0.97
Stock Options	68,45,339	7,13,597	0.50
Index Futures	36,394	5,94,844	-
NSE F&O Total Turnover	5,19,41,151	90,93,278	0.89
NSE Cash Turnover	-	1,11,636	-
BSE Cash Turnover	-	13,41,408	-
Total Turnover	-	1,05,46,322	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	13-Aug-26		12-Aug-26		11-Aug-26	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-570	525	-1,384	2,554	-647	86
Index option	-13,538	28,520	-2,770	36,894	-24,774	-94,342
Stock Future	361	1,068	1,048	-99	-921	-1,699
Stock option	-403	-35,994	-306	4,479	-652	2,407
Total	**-14,150**	**-5,881**	**-3,412**	**43,828**	**-26,994**	**-93,548**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	13-Aug-26	12-Aug-26	11-Aug-26	10-Aug-26	07-Aug-26
Index Futures	695	1,582	-6	363	480
Index Options	2,256	4,816	165	1,593	230
Stock Futures	1,66,474	-5,82,231	2,03,163	1,79,502	1,73,768
Stock Options	11,798	14,488	15,769	19,157	22,806
F&O Total	**1,81,223**	**-5,61,345**	**2,19,091**	**2,00,616**	**1,97,285**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
HINDPETRO	4,19,74,200	4,46,63,400	393.2	0.78%	6.41%
JUBLFOOD	2,34,80,000	2,52,46,250	484.7	1.47%	7.52%
KALYANKJIL	2,76,46,650	2,92,59,900	617.7	2.82%	5.84%
ASHOKLEY	13,78,00,000	13,93,45,000	177.4	0.44%	1.12%
NYKAA	5,11,78,125	5,26,18,750	329.5	0.97%	2.81%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
JIOFIN	18,56,40,600	21,02,19,250	255.4	-0.27%	13.24%
BHEL	8,03,17,125	8,59,03,125	418.9	-0.17%	6.95%
RELIANCE	10,56,55,000	10,84,05,500	1,316.2	-0.71%	2.60%
HDFCBANK	31,48,48,950	31,72,94,250	729.8	-0.44%	0.78%
NMDC	34,83,94,500	35,06,55,750	84.6	-0.81%	0.65%

DAILY MORNING REPORT

Friday, August 14, 2026

NIFTY OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	24,800	CE	9.05	9,05,114	1,07,73,165	52,13,195
18-Aug-26	25,000	CE	3.10	9,99,768	1,31,37,085	39,99,645
18-Aug-26	24,350	PE	63.40	23,15,828	44,83,700	21,76,525
18-Aug-26	24,300	PE	47.65	22,16,367	77,90,120	21,48,185
18-Aug-26	24,600	CE	39.55	10,74,840	90,37,015	19,58,450
18-Aug-26	24,000	PE	7.25	10,01,486	96,31,440	19,38,430
18-Aug-26	24,700	CE	19.65	8,40,453	75,67,170	16,91,365
18-Aug-26	24,400	PE	82.40	24,85,445	64,90,900	16,41,380
18-Aug-26	24,200	PE	25.55	10,42,183	62,81,145	15,75,600
18-Aug-26	24,500	CE	73.35	17,26,155	1,04,67,210	15,27,500

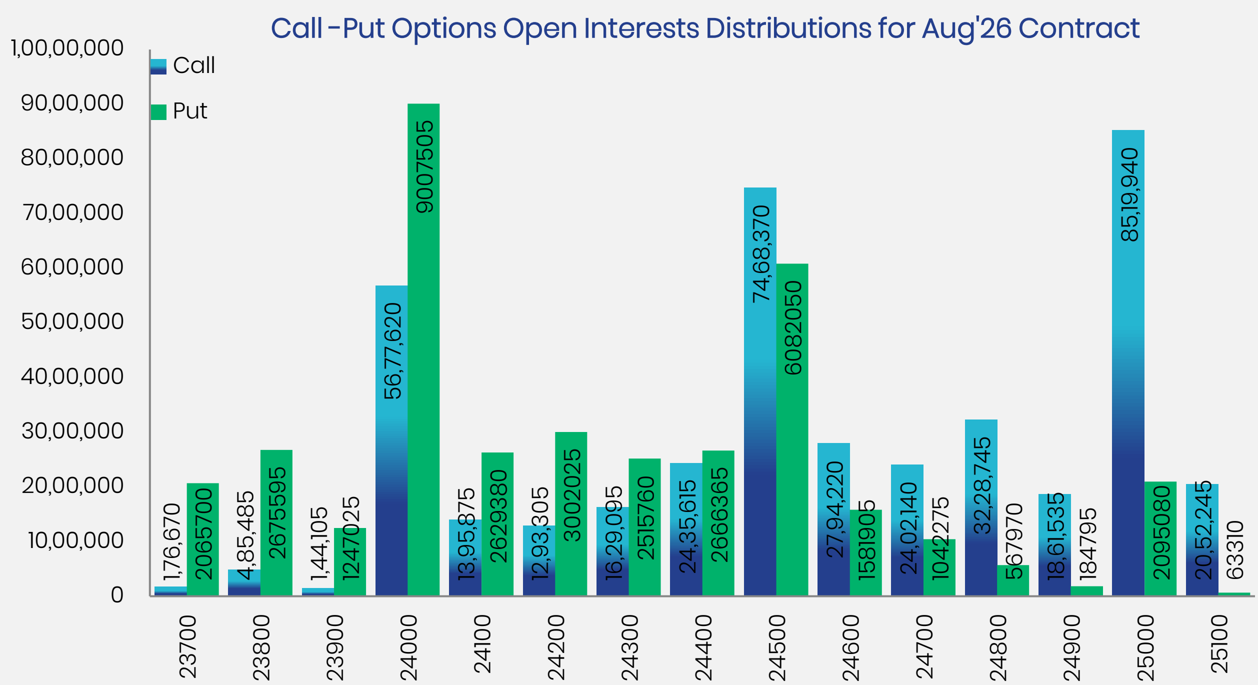
HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	22,500	PE	0.85	91,710	28,92,500	-4,90,620
18-Aug-26	25,150	CE	1.70	3,15,383	9,93,590	-4,27,635
18-Aug-26	25,700	CE	0.65	1,50,561	31,34,105	-3,87,660
18-Aug-26	23,200	PE	1.30	1,63,937	20,91,895	-2,71,115
18-Aug-26	25,450	CE	1.05	85,883	12,48,845	-2,59,090
18-Aug-26	25,350	CE	1.15	1,63,938	10,90,570	-2,04,620
18-Aug-26	23,800	PE	2.65	5,09,795	47,52,865	-1,71,730
25-Aug-26	24,600	PE	244.60	22,781	15,81,905	-1,33,510
18-Aug-26	25,300	CE	1.20	3,70,802	28,62,080	-1,20,445
18-Aug-26	22,600	PE	0.80	29,611	2,31,010	-1,04,065

DAILY MORNING REPORT

Friday, August 14, 2026

NIFTY OPTION OPEN INTEREST STATISTICS



STOCK OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Interest	Change in OI
ASHOKLEY	25-Aug-26	200	CE	0.67	11,091	1,56,85,000	1,27,55,000
IDEA	29-Sep-26	14	CE	0.63	703	5,87,52,450	1,26,51,075
IDEA	25-Aug-26	14	PE	0.64	2,310	12,77,25,825	87,19,950
JIOFIN	25-Aug-26	260	CE	4.40	36,364	2,67,68,850	66,38,750
IDFCFIRSTB	25-Aug-26	89	CE	0.74	1,008	1,21,68,800	63,25,550
IDEA	29-Sep-26	14	PE	0.93	265	2,23,00,200	59,32,425
IDEA	29-Sep-26	15	CE	0.35	571	8,09,09,700	55,03,575
IDFCFIRSTB	25-Aug-26	84	PE	0.50	1,197	1,17,51,425	50,45,600
IDFCFIRSTB	25-Aug-26	92	CE	0.29	897	1,16,67,950	47,95,175
IDEA	29-Sep-26	13	PE	0.39	395	2,37,29,700	45,74,400

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	14	CE	0.23	9,811	48,56,72,625	-2,82,32,625
IDEA	25-Aug-26	12	PE	0.03	1,963	21,45,67,950	-2,09,42,175
IDEA	25-Aug-26	12	CE	1.61	608	3,71,67,000	-1,07,21,250
IDEA	25-Aug-26	13	PE	0.15	5,665	23,03,63,925	-1,00,77,975
BEL	25-Aug-26	405	CE	10.20	9,052	29,54,025	-39,42,975
IDEA	25-Aug-26	11	PE	0.02	335	3,18,06,375	-36,45,225
SWIGGY	25-Aug-26	270	CE	12.65	2,622	15,25,700	-28,37,875
SWIGGY	25-Aug-26	295	CE	3.50	3,240	20,98,750	-25,64,125
IDFCFIRSTB	25-Aug-26	90	CE	0.55	2,100	3,44,75,175	-23,00,200
JUBLFOOD	25-Aug-26	480	PE	8.15	12,602	12,52,500	-22,92,500

DAILY MORNING REPORT

Friday, August 14, 2026

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Krishna Kumar Agarwal

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Date: 2026.08.14 08:42:08 +05'30'

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