DAILY MORNING REPORT

Monday, August 17, 2026

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TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Bullish candle with increase in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 23770
- Crucial moving average of 20/50 SMA are at 24323 and 24084
- 200 SMA trend deciding level exist at 24730

Indian Equity Market Performance

Indian equity markets ended modestly lower on Friday as heightened maritime tensions in the Middle East offset softer U.S. inflation data as well as eased concerns over Federal Reserve rate path.

Sectoral Front Performance

On the Sectoral front auto, energy, FMCG, metal, pharma, realty down 0.3-1%, while consumer durables, media gained nearly 1% each.

Technical Analysis

Nifty 50 formed a Doji-like candlestick on the daily chart after trading within Wednesday's range, reflecting indecision and continued consolidation. The index slipped below its 200-day EMA but managed to close marginally above its 20-day EMA at 24,364, while remaining comfortably above its 50- and 100-day EMAs. Momentum indicators, however, point to caution, with the RSI easing to 52 and the MACD maintaining its bearish crossover. The near-term bias has therefore turned mildly bearish. Immediate support is placed at 24,200, where the 100-day EMA, 50-day EMA and 50 percent Fibonacci retracement converge. A decisive break could trigger a decline towards 24,050–24,000. On the upside, 24,500 remains the key resistance.

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	53732	-107.6	-0.20
Nasdaq	26729	-73.9	-0.28
S&P 500	7786	-13.2	-0.17
FTSE 100	10750	-22.6	-0.21
DAX	26440	140.6	0.53
Hang Seng	25519	401.7	1.60
Nikkei	68664	-50.3	-0.07
Sensex	78009	-70.7	-0.09
Nifty	24366	-29.9	-0.12

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,453.10	15.80	0.36
Silver ($/Oz)	65.82	0.71	1.09
Brent Crude ($/bl)	88.90	0.38	0.43
Dollar Index	99.42	-0.14	-0.14
USD/INR	95.64	0.20	0.21
USD/YEN	159.04	-0.28	-0.18
EUR/USD	1.16	0.00	0.10

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	76801	77626	78009	78451	78946
Nifty	24000	24250	24366	24500	24650
Nifty Fut	24084	24334	24450	24584	24734

Pivot Level	
Sensex	77914
Nifty	24356

ECONOMY NEWS

The wholesale price inflation (WPI) rate based on the 2022-23 series eased marginally to 9.78 per cent in July from a series-high 9.87 per cent in June, as a sharp cooling in energy costs offset a broad-based hardening in prices of food, primary articles and manufactured goods, according to data released by the Ministry of Commerce and Industry on Friday. (BS)

India's foreign exchange reserves rose to a four-month high of $707 billion as of August 7, bolstered by robust inflows under policy measures to strengthen India's balance of payments. The reserves jumped $14.1 billion week-on-week, the largest rise since January, the Reserve Bank of India said on Friday. The rise was led by a $9.9 billion weekly gain in the central bank's foreign currency assets. (BS)

Prime Minister Narendra Modi will deliver his 13th Independence Day speech on Saturday morning from the ramparts of the Red Fort. Reforms, creating job opportunities for the youth, and the government's efforts to achieve self-reliance in semiconductors, energy and defence production sectors have featured prominently in his past three Independence Day speeches. (BS)

India's global image remains mixed but tilts positive in several major economies, with European countries showing particularly favourable views, according to a recent Pew Research Center survey. Of the 36 countries surveyed, 20 recorded a higher share of respondents viewing India favourably than unfavourably, while the reverse was true in 16 countries. (BS)

India has lowered windfall taxes on exports of petrol, diesel and aviation turbine fuel with effect from Saturday, according to a government order. The duty on diesel exports has been cut to ₹24 ($0.2515) per litre from ₹25.5, while petrol duty has been set at zero rupees per litre, down from ₹3.5, the government order showed. (BS)

The Petroleum and Natural Gas Ministry, in an order issued on August 13, has specified maximum LPG production levels for 21 refineries and upstream companies, with combined production potential set at 63,810 tonnes a day -- more than double the domestic LPG output in the fiscal year ended March 31, 2026 and about 70 per cent of the country's daily consumption. (BS)

CORPORATE NEWS

Reliance and Rolls-Royce announced their strategic intent to partner and offer capabilities for the design, development, manufacturing, and delivery of a sovereign, indigenous combat engine for India's Advanced Medium Combat Aircraft (AMCA) programme. They will explore the formation of a dedicated Aerospace Gas Turbine Complex, which will serve as a centre of excellence for power and propulsion technology in India.

ONGC has secured a licence from the US Treasury's Office of Foreign Assets Control (OFAC), allowing it to resume full operations in Venezuela after years of limiting activity because of sanctions-related risks.

The USFDA completed a GMP inspection at Dr Reddy's Laboratories' formulations manufacturing facility (FTO-3) in Bachupally, Hyderabad. The USFDA issued a Form 483 containing four observations.

Purvah Green Power, a subsidiary of CESC, has received a LOA from the Solar Energy Corporation of India (SECI) for the supply of 70 MW of Firm and Dispatchable Renewable Energy Round-the-Clock (FDRE-RTC) power from an ISTS-connected Renewable Energy (RE) power project in India.

BEML has received an order worth $6.65 million from Mauritius for the supply of BE220G Hydraulic Excavators for deployment across key African markets, including Liberia, Sierra Leone, Ghana, the Democratic Republic of Congo (DRC), Côte d'Ivoire, and neighbouring countries.

Jindal Stainless will investing ₹900 crore to increase its cold rolling capacity to cater to the rising demand of the product from sectors such as automotive, appliances, and food processing.

Juniper Green Energy has received a Letter of Award (LOA) from the Solar Energy Corporation of India (SECI) for 230 MW of contracted capacity for a Firm and Dispatchable Renewable Energy Round-the-Clock (FDRE-RTC) power project.

Kalpataru Projects has secured new orders worth Rs 3,526 crore for an industrial plant in India.

UPL has agreed to acquire a 99.98% stake in Egyptian seed company Misr Hytech Seed International S.A.E. for approx $110 million to strengthens its presence in the high-growth corn seed markets across the Middle East and Africa.

BULK DEALS

- **Leap India Limited:** Smallcap World Fund Inc Buy 8856143 Shares @ Rs. 161.22
- **Leap India Limited:** The Prudential Assurance Company Limited Buy 5550198 Shares @ Rs. 154.16
- **Leap India Limited:** Habrok India Master Lp Buy 4700000 Shares @ Rs. 165.26
- **Indigo Paints Limited:** Hdfc Mutual Fund Buy 580947 Shares @ Rs. 1173.26
- **Rolex Rings Limited:** Mirae Asset Mutual Fund Buy 930425 Shares @ Rs. 178.59
- **Optimystix Ent India Ltd:** Vbcube Ventures Fund Ii Sell 217600 Shares @ Rs. 180
- **Value 360 Communication L:** Nova Global Opportunities Fund Pcc - Touchstone Sell 477600 Shares @ Rs. 80.95
- **Optimystix Ent India Ltd:** Vikasa India Eif I Fund-Incube Global Opportunities Sell 155200 Shares @ Rs. 180.42
- **Optimystix Ent India Ltd:** Kuber India Opportunity Fund Sell 155200 Shares @ Rs. 180
- **Value 360 Communication L:** Craft Emerging Market Fund Pcc-Citadel Capital Fund Buy 298800 Shares @ Rs. 80.95
- **Optimystix Ent India Ltd:** Vikasa India Eif I Fund-Incube Global Opportunities Buy 120000 Shares @ Rs. 178
- **Value 360 Communication L:** Craft Emerging Market Fund Pcc- Elite Capital Fund Buy 240000 Shares @ Rs. 80.92
- **Wework:** 1 Ariel Way Tenant Limited Sell 3500000 Shares @ Rs. 697.55
- **Wework:** Icici Prudential Mutual Fund Buy 1421799 Shares @ Rs. 697.55
- **Wework:** Motilal Oswal Asset Management Company Limited Pms Buy 787000 Shares @ Rs. 697.55
- **Menonbe:** Persistence Capital Fund I Buy 875000 Shares @ Rs. 240

INSIDER TRADE

Acquisition

- * Refex Renewables & Infrastructure Ltd: Refex Holding Private Limited, Promoter, Acquisition 1391869 shares on 14-Aug-26
- * Mindspace Business Parks Reit: Vinod Rohira, Director, Acquisition 50000 shares on 10-Aug-26
- * Kovai Medical Center & Hospital Ltd: Palaniswami N, Promoter and Director, Acquisition 1259725 shares on 11-Aug-26
- * Ncl Industries Ltd-$: Kalidindi Ravi, Promoter and Director, Acquisition 1698 shares on 13-Aug-26

Disposal

- * Sar Auto Products Ltd: SHREYAS RAMESHBHAI VIRANI, Promoter and Director, Disposal 2778 shares on 14-Aug-26
- * Refex Renewables & Infrastructure Ltd: Avyan Pashupathy Capital Advisors Private Limited, Promoter, Disposal 1391869 shares on 14-Aug-26
- * Avenue Supermarts Ltd: Bhaskaran N, Director, Disposal 500 shares on 13-Aug-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
LGEINDIA	1,736.1	10.0%	GSPL	268.4	-7.1%
ELGIEQUIP	609.0	5.6%	NATIONALUM	376.0	-6.1%
ZEEL	102.0	5.4%	SAMMAANCAP	152.3	-5.9%
CEMPRO	1,298.8	5.0%	OLECTRA	1,315.0	-5.6%
HONASA	502.0	4.7%	HINDPETRO	372.5	-5.2%
IDEA	14.1	4.4%	CPPLUS	3,519.0	-5.0%
SUMICHEM	565.3	4.1%	NATCOPHARM	907.0	-4.7%
ASAHIINDIA	938.0	4.1%	TMPV	334.0	-4.5%
DEVYANI	144.0	4.0%	ABDL	601.0	-4.3%
BATAINDIA	756.0	3.9%	EMCURE	1,928.0	-4.1%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	14,295.49	13,939.09	356.40
FII	12,854.44	12,346.32	508.12

Category	14-Aug-26	13-Aug-26	12-Aug-26	11-Aug-26	10-Aug-26	07-Aug-26
DII	356.40	4,353.09	5,841.66	24.77	-1,290.29	235.56
FII	508.12	-510.69	-1,002.50	258.55	1,974.76	480.24

DAILY MORNING REPORT

Monday, August 17, 2026

DERIVATIVE REPORT

- Nifty declined by 0.12% with Nifty future added 2.10 lakh shares in open interest and stock
- Stock future shaded 59.8 Lakh shares in open interest.
- Nifty PCR increased to 0.98 from 0.92
- Total Nifty Calls added 128.9 lakh shares in open interest.
- Total Nifty Puts added 287.7 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 25000 and 24000 put.
- FII's bought net Rs. 508.12 Cr (provisional), while DIIs bought net Rs. 356.40 Cr in cash market
- FII bought net Rs. 3566.92 Cr in F&O
- Securities in Ban Period: - BANDHANBNK, LICI, MANAPPURAM, SAIL

NIFTY TRACKER

	14-Aug-26	13-Aug-26	12-Aug-26	11-Aug-26
Spot	24,366.0	24,395.9	24,436.0	24,471.7
% Change in Spot	-0.12%	-0.16%	-0.15%	-0.46%
Nifty(FUT) Aug.	24449.6	24468.0	24470.5	24540.5
Nifty(FUT) Aug. Vol.	25199	21683	46992	25675
Nifty(FUT) Aug. - OI	12731485	12714650	12562810	12123995
Nifty(FUT) Sept.	24587.0	24602.0	24602.9	24674.1
Nifty(FUT) Sept. Vol.	5168	3541	6585	3061
Nifty(FUT) Sept. - OI	1758965	1587430	1528540	1405690

TRADE STATISTICS FOR 14-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	8,24,114	58,54,605	-
Index Options	7,65,77,075	30,56,229	0.97
Stock Options	80,91,370	7,46,635	0.49
Index Futures	46,932	7,68,341	-
NSE F&O Total Turnover	8,55,39,491	1,04,25,810	0.91
NSE Cash Turnover	-	1,05,585	-
BSE Cash Turnover	-	9,23,815	-
Total Turnover	-	1,14,55,210	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	14-Aug-26		13-Aug-26		12-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	-1,315	587	-570	525	-1,384	2,554
Index option	5,589	38,650	-13,538	28,520	-2,770	36,894
Stock Future	-174	-118	361	1,068	1,048	-99
Stock option	-532	43,004	-403	-35,994	-306	4,479
Total	**3,568**	**82,124**	**-14,150**	**-5,881**	**-3,412**	**43,828**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	14-Aug-26	13-Aug-26	12-Aug-26	11-Aug-26	10-Aug-26
Index Futures	529	695	1,582	-6	363
Index Options	120	2,256	4,816	165	1,593
Stock Futures	1,14,372	1,66,474	-5,82,231	2,03,163	1,79,502
Stock Options	8,995	11,798	14,488	15,769	19,157
F&O Total	**1,24,016**	**1,81,223**	**-5,61,345**	**2,19,091**	**2,00,616**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
JUBLFOOD	2,43,60,000	2,65,78,750	500.6	2.21%	9.11%
KOTAKBANK	16,25,36,000	16,44,00,000	393.2	0.11%	1.15%
UNIONBANK	10,90,58,550	11,08,94,925	187.1	0.40%	1.68%
INDUSTOWER	9,29,57,700	9,46,93,400	386.2	0.55%	1.87%
ADANIENSOL	1,92,81,375	2,03,04,675	1,614.0	1.62%	5.31%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
YESBANK	1,11,77,65,100	1,12,94,58,700	22.7	-1.30%	1.05%
ASHOKLEY	13,50,15,000	14,58,80,000	172.0	-3.10%	8.05%
TMPV	7,66,24,000	8,71,04,000	333.0	-5.13%	13.68%
JIOFIN	19,18,82,200	19,96,53,650	249.1	-2.45%	4.05%
ETERNAL	14,38,55,850	14,86,98,575	318.8	-0.05%	3.37%

DAILY MORNING REPORT

Monday, August 17, 2026

NIFTY OPTION OPEN INTEREST STATISTICS

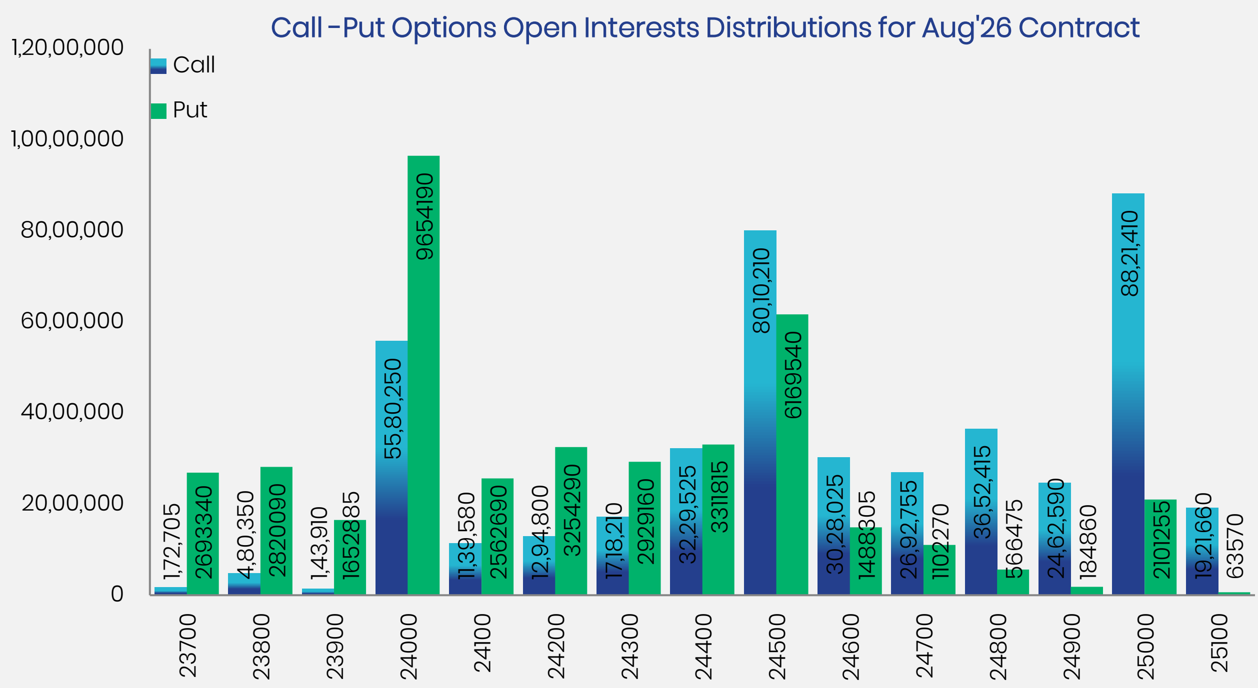
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	24,300	PE	36.60	55,67,965	1,02,04,935	24,14,815
18-Aug-26	24,350	PE	51.55	49,30,438	67,96,465	23,12,765
18-Aug-26	24,000	PE	5.55	13,72,477	1,14,07,240	17,75,800
18-Aug-26	24,350	CE	126.50	40,09,306	40,20,770	16,71,085
18-Aug-26	24,050	PE	6.95	7,00,672	29,80,705	14,00,165
25-Aug-26	26,000	CE	1.00	44,804	56,23,020	11,06,755
18-Aug-26	24,400	CE	96.85	45,45,329	81,04,785	10,77,570
18-Aug-26	24,250	PE	25.45	20,52,892	39,07,345	10,00,220
18-Aug-26	24,700	CE	10.95	14,29,615	85,64,920	9,97,750
18-Aug-26	24,200	PE	17.80	22,85,806	72,42,495	9,61,350

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	26,000	CE	0.55	2,24,992	39,43,745	-27,66,140
18-Aug-26	25,000	CE	2.10	16,43,293	1,15,80,660	-15,56,425
18-Aug-26	25,900	CE	0.50	64,623	23,65,870	-7,30,145
18-Aug-26	25,200	CE	1.10	5,30,433	40,94,415	-6,71,840
18-Aug-26	23,900	PE	3.80	8,42,230	44,13,175	-6,65,340
18-Aug-26	24,500	PE	126.50	13,48,119	37,34,965	-6,58,645
18-Aug-26	26,100	CE	0.50	20,449	6,05,475	-4,74,630
18-Aug-26	24,800	CE	5.05	11,40,822	1,03,57,100	-4,16,065
18-Aug-26	24,850	CE	3.80	5,92,438	27,46,185	-3,56,460
18-Aug-26	25,050	CE	1.65	4,64,904	20,34,695	-3,52,495

NIFTY OPTION OPEN INTEREST STATISTICS



DAILY MORNING REPORT

Monday, August 17, 2026

STOCK OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Interest	Change in OI
IDEA	25-Aug-26	14	PE	0.24	5,726	22,97,92,125	10,20,66,300
IDEA	25-Aug-26	15	CE	0.12	11,908	33,90,05,925	3,50,94,225
IDEA	25-Aug-26	16	CE	0.05	5,069	11,54,32,125	3,32,35,875
IDEA	25-Aug-26	13	PE	0.04	6,427	25,47,36,900	2,43,72,975
IDEA	29-Sep-26	13	PE	0.23	776	4,36,71,225	1,99,41,525
IDEA	29-Sep-26	14	PE	0.58	520	3,65,95,200	1,42,95,000
IDEA	29-Sep-26	14	CE	0.87	996	7,09,74,675	1,22,22,225
IDEA	29-Sep-26	15	CE	0.51	1,066	9,30,60,450	1,21,50,750
ASHOKLEY	25-Aug-26	180	CE	1.45	23,431	2,80,70,000	1,19,90,000
IDEA	29-Sep-26	16	CE	0.30	956	5,05,32,825	1,05,78,300

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	14	CE	0.41	12,259	38,98,96,125	-9,57,76,500
IDEA	25-Aug-26	13	CE	1.20	4,681	24,34,43,850	-7,77,64,800
IDEA	25-Aug-26	12	PE	0.02	1,317	18,72,64,500	-2,73,03,450
IDEA	25-Aug-26	12	CE	2.18	885	2,68,03,125	-1,03,63,875
IDEA	29-Sep-26	12	PE	0.09	502	3,60,23,400	-45,02,925
PNB	25-Aug-26	107	PE	0.10	554	14,64,000	-30,56,000
BHEL	25-Aug-26	420	CE	11.70	8,510	47,27,625	-29,66,250
PNB	25-Aug-26	125	CE	0.28	1,267	57,84,000	-25,44,000
TATASTEEL	25-Aug-26	185	PE	3.94	3,108	76,78,000	-24,99,750
ASHOKLEY	25-Aug-26	200	CE	0.20	12,311	1,36,90,000	-19,95,000

DAILY MORNING REPORT

Monday, August 17, 2026

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Investors are strongly advised to carefully consider all relevant risk factors, including their financial condition and suitability to risk-return profiles, and to seek professional advice before making any investment decisions.

Krishna Kumar Agarwal

Digitally signed by Krishna Kumar Agarwal
Date: 2026.08.17 08:41:09 +05'30'

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