DAILY MORNING REPORT

Tuesday, August 18, 2026

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TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Bearish candle with increase in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 23774
- Crucial moving average of 20/50 SMA are at 24325 and 24102
- 200 SMA trend deciding level exist at 24722

Indian Equity Market Performance

Indian equity markets ended Monday's session lower as investors digested weak economic data from the U.S., Japan and China, and kept a close eye on geopolitical developments in the Middle East.

Sectoral Front Performance

On the Sectoral front IT index down nearly 2%, while metal index rose 1.2% and Realty index up 1.5%.

Technical Analysis

Nifty 50 extended its weakness, forming a bearish candle with a lower shadow on the daily chart, signalling buying interest at lower levels but an overall fragile undertone. The index slipped below its short-term moving averages and the Bollinger Bands' midline, while continuing to hold above the 50- and 100-day EMAs. Momentum indicators also weakened, with the RSI easing to 49 and the MACD's bearish crossover gaining strength. The near-term bias has consequently turned mildly bearish. Immediate support lies at 24,200, where the 50- and 100-day EMAs converge with the 50% Fibonacci retracement. A decisive breach could drag the index towards 24,050–24,000, while 24,500 remains the key hurdle on the upside.

Option Activity

On option front, maximum Put OI is at 24300 followed by 24000 strike, while maximum Call OI is at 24400 followed by 24500 strike. Call writing was seen at 24400 strike, followed by 24350 strike while Put writing was seen at 24300 strike, followed by 24250.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	53460	-272.6	-0.51
Nasdaq	26645	-84.3	-0.32
S&P 500	7745	-40.7	-0.52
FTSE 100	10720	-29.8	-0.28
DAX	26339	-101.7	-0.38
Hang Seng	25400	-53.2	-0.21
Nikkei	68736	-484.3	-0.70
Sensex	77728	-281.1	-0.36
Nifty	24288	-78.4	-0.32

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,480.00	6.30	0.14
Silver ($/Oz)	66.45	0.21	0.32
Brent Crude ($/bl)	91.11	0.24	0.26
Dollar Index	99.45	-0.03	-0.03
USD/INR	95.61	0.01	0.01
USD/YEN	159.43	-0.01	-0.01
EUR/USD	1.16	0.00	0.03

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	76778	77438	77728	78428	78923
Nifty	24000	24200	24288	24500	24650
Nifty Fut	24105	24305	24393	24605	24755

Pivot Level	
Sensex	77704
Nifty	24292

ECONOMY NEWS

India should bring back a fuel variant with a lower blend of ethanol, according to a top government adviser, the first senior official to call for wider fuel options amid growing consumer anger against a contentious policy change. (BS)

Overall unemployment rate among persons aged 15 years and above declined to 5.1 per cent in July 2026 from 5.5 per cent in the previous month, according to a government survey. (BS)

The government has approved 31 fresh proposals under the Electronics Components Manufacturing Scheme, involving an investment of ₹7,877 crore, IT Secretary S Krishnan said. (BS)

The Pradhan Mantri Viksit Bharat Rozgar Yojana (PM-VBRY), India's flagship employment generation scheme, has created a third of its target for first-time jobs since its implementation on August 1, 2025. (BS)

The draft rules announced by the Department of Atomic Energy (DAE) under the Sustainable Harnessing and Advancement of Nuclear Energy (SHANTI) Act are "very well-structured" and many of its provisions are "genuine steps forward", according to independent experts. (BS)

The Centre's proposed free coaching network could put pressure on parts of India's private coaching market, particularly smaller and mid-tier providers, while established institutes may continue to attract students through personalised services, experts said. (BS)

Union Minister for Commerce and Industry Piyush Goyal on Monday held a meeting with Sundeep Sikka, MD and CEO of Nippon Life India Asset Management Ltd, and discussed measures to deepen retail investment and strengthen India's asset management ecosystem. (ET)

Rating agency ICRA estimated India's GDP growth at a four-quarter low of 7 per cent in the April-June quarter of the current fiscal, sliding from 7.8 per cent in the March quarter of FY26, on a slower pace of expansion in the services sector. (ET)

Renewable energy developers that miss project milestones will no longer necessarily lose their inter-state transmission connectivity immediately. The CERC has allowed eligible projects up to 12 months of additional time, in exchange for escalating compensation charges, potentially preventing substantially developed projects from being derailed by execution delays.

CORPORATE NEWS

L&T has bagged a ultra-mega order in the Middle East for the development of multiple offshore facilities. The company classifies orders worth over ₹15,000 crore as 'ultra-mega'.

Tata Power has signed a Master Research Agreement with IIT Bombay to boost innovations in next-generation energy technologies and advanced clean energy solutions.

Lenskart has set up a step-down subsidiary Wenzhou Framekart Trade Co Ltd in China that will be engaged in the business of trading, importing, exporting and procuring spectacle frames as well as other optical products.

Nelco has announced a partnership and an investment of $20 million (approximately ₹191.2 crore) in US-based Lunar Holdco, Inc., which operates as Elveo Mobile with aimed at bringing next-generation Direct-to-Device (D2D) and Internet of Things (IoT) satellite connectivity to India and South Asian markets.

Hexaware Technologies introduced the Zero Friction Enterprise, a delivery framework that folds the information technology services company's modernization, cybersecurity, engineering, operations, quality and enterprise software practices into a single offering aimed at the drag that builds up inside large technology estates.

Manipal Health Enterprises has signed a Business Transfer Agreement with Kindorama Healthcare to acquire the entire business operations and assets of Kinder Hospital for Rs 130 crore in Doddanekundi Industrial Area, Bengaluru.

Resilient Asset Management B.V., the parent and promoter entity of Vijay Shekhar Sharma, is likely to sell up to a 4.98 percent stake in One 97 Communications Paytm, with a floor price of Rs 1,535.10 per share, CNBC-TV18 reported.

Lloyds Engineering Works has entered into an agreement with Italy's Alpar Ingegneria S.R.L. to focuses on design, technology transfer and licensed manufacturing of advanced systems in India.

Jyoti CNC Automation's capital investment proposal amounting to Rs 1,020.65 crore over the next five years at its existing manufacturing facility in Rajkot has received approval under the Electronic Components Manufacturing Scheme of the Ministry of Electronics and Information Technology (MeitY), New Delhi.

BULK DEALS

- **Leap India Limited:** Government Of Singapore Buy 2215127 Shares @ Rs. 155.28
- **Ponni Sugars (Erode) Limi:** Atyant Capital India Fund I Sell 313525 Shares @ Rs. 349.85
- **Ratnaveer Precision Eng L:** Mathisys Quantcap Llp Sell 453076 Shares @ Rs. 238.37
- **Ratnaveer Precision Eng L:** Mathisys Quantcap Llp Buy 425126 Shares @ Rs. 238.6
- **Encompass Design India L:** Radiant Global Fund-Class B Participating Shares Buy 174000 Shares @ Rs. 232
- **Kesar:** Minerva Ventures Fund Buy 1178000 Shares @ Rs. 1265
- **Kesar:** Forbes Emf Sell 1178000 Shares @ Rs. 1265
- **Visachrome:** Al Maha Investment Fund Pcc - Onyx Strategy Buy 7894000 Shares @ Rs. 38
- **Visachrome:** Assets Care And Reconstruction Enterprise Limited Sell 7893513 Shares @ Rs. 38

INSIDER TRADE

Acquisition

- * Nippon Life India Asset Management Ltd: Sundeep Sikka, Director, Acquisition 250000 shares on 12-Aug-26
- * Alembic Ltd: Nirayu Private Limited, Promoter Group, Acquisition 454376 shares on 14-Aug-26

Disposal

- * Info Edge (India) Ltd: Promoter and Director, Disposal 1350000 shares on 17-Aug-26
- * Leap India Ltd: Promoter Group, Disposal 125786162 shares on 12-Aug-26
- * India Homes Ltd: Isisales India Pvt Ltd, Promoter Group, Disposal 78209 shares on 12-Aug-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
IPCALAB	1,875.2	8.1%	SCHNEIDER	1,232.2	-10.0%
HINDCOPPER	570.0	7.7%	BELRISE	236.9	-7.2%
PTCIL	20,400.0	7.1%	GSPL	268.4	-7.1%
GPIL	251.1	6.7%	NSLNISP	42.0	-5.7%
INOXWIND	78.2	6.1%	CPPLUS	3,343.1	-5.0%
FINCABLES	1,318.0	5.7%	J&KBANK	148.2	-4.7%
MOTILALOFS	955.0	5.7%	VOLTAS	1,263.0	-4.4%
BALRAMCHIN	654.5	4.7%	HONASA	482.0	-4.1%
CONCORDBIO	1,520.0	4.7%	JBCHEPHARM	2,408.9	-3.9%
OBEROIRLTY	1,930.0	4.6%	LGEINDIA	1,663.4	-3.8%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	16,654.08	11,552.62	5,101.46
FII	11,546.16	14,081.26	-2,535.10

Category	17-Aug-26	14-Aug-26	13-Aug-26	12-Aug-26	11-Aug-26	10-Aug-26
DII	5,101.46	356.40	4,353.09	5,841.66	24.77	-1,290.29
FII	-2,535.10	508.12	-510.69	-1,002.50	258.55	1,974.76

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DERIVATIVE REPORT

- Nifty declined by 0.32% with Nifty future added 2.20 lakh shares in open interest and stock
- Stock future shaded 1249.6 Lakh shares in open interest.
- Nifty PCR increased to 0.99 from 0.98
- Total Nifty Calls added 229.0 lakh shares in open interest.
- Total Nifty Puts added 249.2 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. 2,535.10 Cr (provisional), while DIIs bought net Rs. 5,101.46 Cr in cash market
- FII bought net Rs. 7355.18 Cr in F&O
- Securities in Ban Period: - BANDHANBNK, LICI, MANAPPURAM, SAIL

NIFTY TRACKER

	17-Aug-26	14-Aug-26	13-Aug-26	12-Aug-26
Spot	24,287.7	24,366.0	24,395.9	24,436.0
% Change in Spot	-0.32%	-0.12%	-0.16%	-0.15%
Nifty(FUT) Aug.	24392.7	24449.6	24468.0	24470.5
Nifty(FUT) Aug. Vol.	34812	25199	21683	46992
Nifty(FUT) Aug. - OI	12770940	12731485	12714650	12562810
Nifty(FUT) Sept.	24533.5	24587.0	24602.0	24602.9
Nifty(FUT) Sept. Vol.	6133	5168	3541	6585
Nifty(FUT) Sept. - OI	1907490	1758965	1587430	1528540

TRADE STATISTICS FOR 17-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	8,19,705	56,43,219	-
Index Options	12,90,68,277	39,00,193	0.99
Stock Options	73,17,628	5,98,301	0.46
Index Futures	67,841	11,12,420	-
NSE F&O Total Turnover	13,72,73,451	1,12,54,133	0.95
NSE Cash Turnover	-	1,08,280	-
BSE Cash Turnover	-	9,12,762	-
Total Turnover	-	1,22,75,175	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	17-Aug-26		14-Aug-26		13-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	-785	679	-1,315	587	-570	525
Index option	8,423	26,312	5,589	38,650	-13,538	28,520
Stock Future	147	1,314	-174	-118	361	1,068
Stock option	-429	2,384	-532	43,004	-403	-35,994
Total	**7,356**	**30,689**	**3,568**	**82,124**	**-14,150**	**-5,881**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	17-Aug-26	14-Aug-26	13-Aug-26	12-Aug-26	11-Aug-26
Index Futures	165	529	695	1,582	-6
Index Options	3,559	120	2,256	4,816	165
Stock Futures	1,28,733	1,14,372	1,66,474	-5,82,231	2,03,163
Stock Options	3,684	8,995	11,798	14,488	15,769
F&O Total	**1,36,141**	**1,24,016**	**1,81,223**	**-5,61,345**	**2,19,091**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
YESBANK	1,05,41,03,400	1,08,37,72,800	22.9	0.88%	2.81%
NMDC	32,48,16,750	33,44,49,000	85.4	1.64%	2.97%
SUZLON	44,67,22,500	45,37,58,300	49.0	3.51%	1.57%
ASHOKLEY	12,66,10,000	13,26,20,000	177.8	3.01%	4.75%
TATASTEEL	17,15,45,000	17,46,96,500	186.3	1.56%	1.84%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
VOLTAS	75,46,125	90,35,625	1,262.0	-4.84%	19.74%
BIOCON	4,79,82,500	4,93,10,000	414.2	-0.30%	2.77%
GMRAIRPORT	13,17,92,625	13,27,34,250	101.9	-0.20%	0.71%
WIPRO	20,51,85,000	20,61,12,000	181.8	-1.68%	0.45%
TMPV	7,81,93,600	7,90,86,400	331.3	-0.70%	1.14%

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NIFTY OPTION OPEN INTEREST STATISTICS

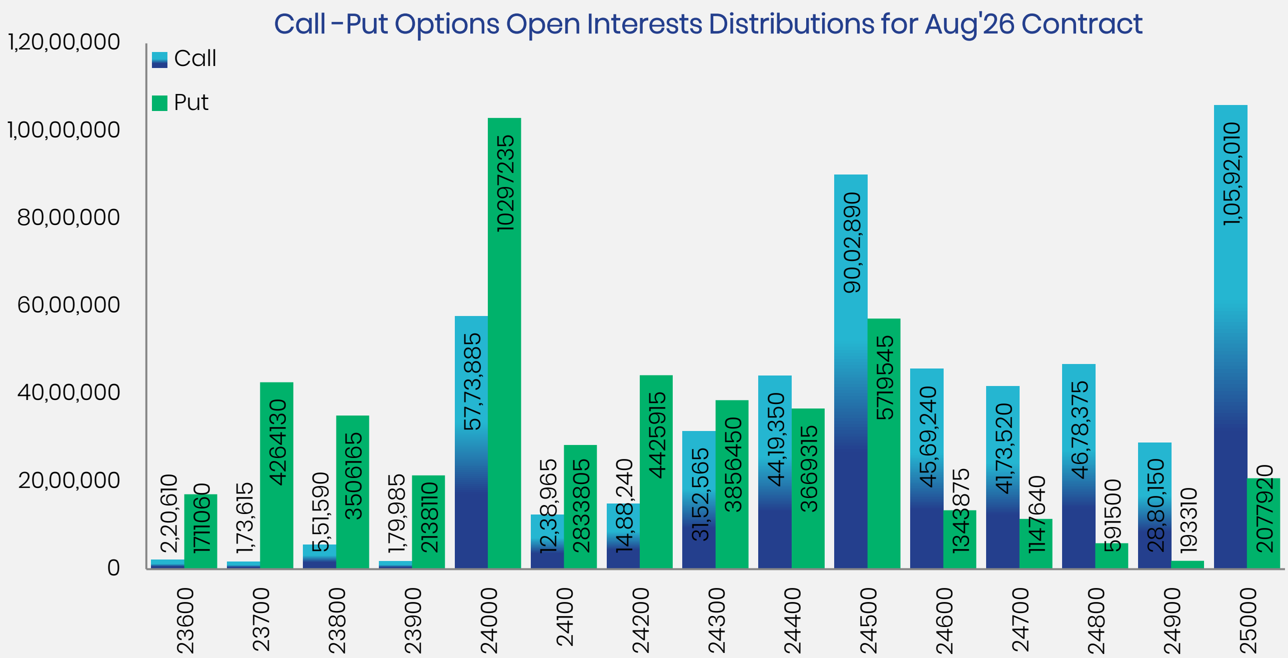
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	24,250	PE	21.10	68,71,751	82,58,835	43,51,490
18-Aug-26	24,300	PE	33.90	1,04,82,795	1,34,90,490	32,85,555
18-Aug-26	24,200	PE	13.30	58,94,407	1,04,02,600	31,60,105
18-Aug-26	24,350	CE	66.70	66,97,010	71,16,460	30,95,690
18-Aug-26	24,300	CE	97.00	81,81,092	62,35,840	30,22,110
25-Aug-26	23,000	PE	3.75	1,20,903	67,22,365	27,25,255
18-Aug-26	24,150	PE	8.35	30,69,852	62,15,625	25,76,925
18-Aug-26	24,400	CE	41.40	72,94,726	1,04,62,465	23,57,680
18-Aug-26	23,900	PE	2.25	16,47,549	65,26,715	21,13,540
18-Aug-26	24,550	CE	9.10	23,98,640	61,71,295	20,79,610

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	25,500	CE	0.50	5,16,249	55,49,180	-29,02,510
18-Aug-26	25,000	CE	0.90	14,58,954	87,17,670	-28,62,990
18-Aug-26	25,800	CE	0.35	1,51,649	7,92,480	-25,11,665
18-Aug-26	24,400	PE	77.45	42,60,832	48,01,095	-24,67,595
18-Aug-26	25,700	CE	0.40	1,66,674	13,30,745	-21,37,525
18-Aug-26	23,000	PE	0.55	2,96,127	37,64,475	-18,14,085
18-Aug-26	24,800	CE	1.50	17,48,108	85,49,320	-18,07,780
18-Aug-26	25,900	CE	0.35	72,215	9,71,100	-13,94,770
18-Aug-26	25,600	CE	0.40	1,75,801	22,20,985	-13,43,680
18-Aug-26	26,000	CE	0.35	1,67,619	27,37,865	-12,05,880

NIFTY OPTION OPEN INTEREST STATISTICS



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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	CE	0.20	5,528	41,97,01,200	2,98,05,075
IDEA	29-Sep-26	14	CE	0.59	931	9,84,21,075	2,74,46,400
IDEA	29-Sep-26	14	PE	0.73	466	5,33,91,825	1,67,96,625
IDEA	29-Sep-26	16	CE	0.17	877	6,64,00,275	1,58,67,450
IDEA	29-Sep-26	15	CE	0.32	938	10,83,56,100	1,52,95,650
IDEA	29-Sep-26	16	PE	2.26	222	1,61,53,350	1,47,23,850
IDEA	29-Sep-26	13	PE	0.26	395	5,21,76,750	85,05,525
ADANIPOWER	25-Aug-26	205	CE	4.38	8,562	1,01,21,050	72,81,050
IDEA	29-Sep-26	13	CE	1.13	202	2,79,46,725	49,31,775
IDEA	29-Sep-26	15	PE	1.43	93	1,04,35,350	42,88,500

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	13	CE	0.81	1,328	21,58,54,500	-2,75,89,350
IDEA	25-Aug-26	13	PE	0.06	3,655	22,85,77,050	-2,61,59,850
IRFC	25-Aug-26	90	CE	0.49	5,757	2,77,65,150	-86,63,725
IDEA	25-Aug-26	20	CE	0.01	154	2,84,47,050	-66,47,175
CANBK	25-Aug-26	140	CE	0.21	1,811	1,13,60,250	-59,80,500
ASHOKLEY	25-Aug-26	180	CE	2.44	19,786	2,30,60,000	-50,10,000
SUZLON	25-Aug-26	48	CE	1.58	3,796	1,03,25,100	-48,64,100
IDEA	25-Aug-26	16	PE	2.29	217	1,40,09,100	-48,60,300
IDEA	25-Aug-26	15	PE	1.31	169	8,62,70,325	-47,17,350
NMDC	25-Aug-26	85	CE	1.65	6,266	90,85,500	-41,58,000

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Krishna Kumar Agarwal

Digitally signed by Krishna Kumar Agarwal
Date: 2026.08.18 08:39:44 +05'30'

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