DAILY MORNING REPORT

Wednesday, August 19, 2026

www.ashikagroup.com

DAILY MORNING REPORT

Wednesday, August 19, 2026

TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Bearish candle with increase in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 23771
- Crucial moving average of 20/50 SMA are at 24324 and 24123
- 200 SMA trend deciding level exist at 24713

Indian Equity Market Performance

Indian equity markets closed lower on Tuesday as rising oil prices and global bond yields amid an apparent impasse in Middle East peace talks rekindled inflation and interest-rate worries.

Sectoral Front Performance

On the Sectoral front Media and Automobiles gained 0.3% each, while IT, Realty and PSU Banks were among the key laggards. The Nifty IT index declined nearly 2% for the third consecutive session.

Technical Analysis

Nifty 50 extended its weakness, forming a bearish candle with a minor upper shadow on the daily chart and closing below the previous session's low. The decline pushed the index below all key moving averages, while short-term averages continued to trend lower, signalling a deteriorating technical setup. Momentum indicators also remained weak, with the RSI slipping to 44 and the MACD sustaining its bearish crossover, suggesting that selling pressure is gradually intensifying. Notably, the index has failed to cross the previous session's high for 11 consecutive trading sessions, underscoring the fragile market structure. Nifty has also slipped below the 50% Fibonacci retracement level at 24,192. Sustained weakness below this mark could drag the index towards 24,050–24,000 and subsequently 23,800. On the upside, any rebound may face resistance in the 24,250–24,300 zone.

Option Activity

On option front, maximum Put OI is at 24000 followed by 23000 strike, while maximum Call OI is at 25000 followed by 24500 strike. Call writing was seen at 26300 strike, followed by 26100 strike while Put writing was seen at 23300 strike, followed by 24500.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	53343	-116.4	-0.22
Nasdaq	26290	-355.2	-1.33
S&P 500	7692	-53.3	-0.69
FTSE 100	10728	7.7	0.07
DAX	26128	-210.3	-0.80
Hang Seng	25455	-16.2	-0.06
Nikkei	65713	-1747.7	-2.59
Sensex	77235	-492.7	-0.63
Nifty	24155	-132.8	-0.55

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,409.70	10.90	0.25
Silver ($/Oz)	63.27	0.77	1.21
Brent Crude ($/bl)	91.91	0.89	0.98
Dollar Index	99.50	-0.06	-0.06
USD/INR	95.80	0.12	0.12
USD/YEN	159.40	-0.21	-0.13
EUR/USD	1.16	0.00	0.04

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	76394	76724	77235	77714	78374
Nifty	23900	24000	24155	24300	24500
Nifty Fut	23975	24075	24230	24375	24575

Pivot Level	
Sensex	77348
Nifty	24193

ECONOMY NEWS

India Ratings & Research projected India's GDP growth to slow down to 6.8% in the current fiscal year, as against 7.6% in the previous year, citing risks from fuel and food inflation stemming from West Asia conflict's uncertainty, weak currency, and the likely impact of El Nino on agriculture. (BS)

The size of the median Indian firm increased across key financial measures after the Covid-19 pandemic, with capital employed, revenue, profit and assets rising steadily between FY21 and FY24, according to a working paper by the Economic Advisory Council to the Prime Minister. (BS)

India's tanker exports surged more than six-fold to $1.36 billion in the June quarter from $221.1 million a year earlier, signalling the country's growing shipbuilding and maritime engineering capabilities, with the UAE emerging as the largest destination during the period, according to commerce ministry data. (BS)

India has sought consultations with the US at the World Trade Organization over tariffs imposed by the White House on some quartz products, adding another point of friction between the two countries as they remain without a trade deal.

China rolled out a series of measures to boost consumption in its counties and smaller cities to revive sluggish domestic demand, which has become a major source of economic slowdown.

The Odisha government announced a special assistance package of ₹1,000 crore for people affected by the floods in the state, assuring that the government would not impose any financial restriction on relief and restoration measures.

Despite $56.8 billion of inflows through the Reserve Bank of India’s (RBI) concessional swap windows, the rupee has appreciated only 0.1 per cent since the scheme was launched, far lower than the 8.8 per cent appreciation seen during the 2013 scheme. Economists said the muted response this time reflects the stronger influence of global factors on the local currency. (BS)

Industry bodies have sought relief from GST rules that prevent businesses from claiming input tax credit (ITC) on certain expenses, according to people familiar with the matter. A key demand is to allow companies to claim ITC on GST paid on construction work and materials that are later used to provide taxable services. (BS)

CORPORATE NEWS

Infosys announced a strategic, long-term collaboration with Knorr-Bremse AG, a global manufacturer of braking systems and safety-critical components for rail and commercial vehicles. Infosys will deliver end-to-end managed services across the company's entire enterprise application ecosystem spanning both Rail and Commercial Vehicle divisions.

ONGC has commissioned gas evacuation facilities at Khoraghat GGS-1 in Golaghat, Assam. The facility will enable surplus associated natural gas from the Upper Assam Shelf to be processed and evacuated through the North East Gas Grid (NEGG), developed by Indradhanush Gas Grid.

Biocon subsidiary has received supplemental approval from the US health regulator for Yesintek prefilled autoinjector for the treatment of moderate-to-severe plaque psoriasis and active psoriatic arthritis.

Crompton Greaves Consumer Electricals is betting on its expanded addressable market, premiumisation push and new product categories such as solar rooftops, wires and a newly-launched water purification range to drive growth in the coming years.

L&T Technology Services (LTTS) has signed a five-year deal worth over $75 million with a global technology enterprise. The contract focuses on deploying LTTS's Engineering Intelligence capabilities across the client's product development lifecycle.

L&T Finance plans to expand its gold-loan business in West Bengal, with 26 more locations expected to be added by March 2027 as the company looks to strengthen its presence in one of the country's large gold-credit markets.

Wipro Consumer Care & Lighting has acquired a 60% stake in skincare brand Dermatouch at an enterprise value of Rs 387.5 crore, marking its entry into India's premium skincare segment.

Jubilant Ingrevia has entered into a binding agreement with Zettaone Technologies India to acquire a 40% strategic stake for Rs 189.2 cr.

Centella Mauritius Holdings, affiliates of TPG, is likely to sell a 7.2 percent stake in Aster DM Quality Care through a block deal, with a floor price of Rs 766.1 per share, reports CNBC-TV18.

BULK DEALS

- **One 97 Communications Ltd:** Resilient Asset Management B V Sell 19210110 Shares @ Rs. 1535.1
- **Nxt-Infra Trust:** Larsen & Toubro Limited Buy 20875000 Shares @ Rs. 95.33
- **Cyient Limited:** Hdfc Mutual Fund Sell 532526 Shares @ Rs. 854.01
- **Ratnaveer Precision Eng L:** Mathisys Quantcap Llp Sell 382434 Shares @ Rs. 251.44
- **Ratnaveer Precision Eng L:** Mathisys Quantcap Llp Buy 357901 Shares @ Rs. 251.53
- **Propshop Events And Exh L:** Nova Global Opportunities Fund Pcc - Touchstone Sell 136000 Shares @ Rs. 70
- **Groww:** Yc Holdings Ii, Llc Sell 74687500 Shares @ Rs. 192.16

INSIDER TRADE

Acquisition

- * T T Ltd-$: T. T. BRANDS LIMITED, Promoter Group, Acquisition 127200 shares on 17-Aug-26
- * Jaro Institute Of Technology Management And Research Ltd: Balkrishna Namdeo Salunkhe, Promoter, Acquisition 22100 shares on 17-Aug-26
- * Vibhor Steel Tubes Ltd: VIJAY KUMAR KAUSHIK, Promoter and Director, Acquisition 5000 shares on 14-Aug-26

Disposal

- * Alphageo (India) Ltd-$: Promoter Group, Disposal 3600 shares on 17-Aug-26
- * Aarti Pharmalabs Ltd: Promoter Group, Disposal 93482 shares on 13-Aug-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
JYOTICNC	929.2	8.3%	SBICARD	615.0	-4.2%
TIINDIA	2,959.0	7.9%	INOXWIND	75.0	-4.1%
GLAXO	2,877.4	6.5%	PTCIL	19,791.0	-3.9%
ACE	1,184.8	6.4%	OBEROIRLTY	1,858.0	-3.8%
ZENTEC	1,982.4	6.3%	TORNTPOWER	1,264.1	-3.7%
AEGISLOG	1,367.7	6.3%	LODHA	1,211.1	-3.4%
ACUTAAS	3,391.4	6.0%	SONATSOFTW	309.5	-3.4%
HEG	739.3	5.9%	MPHASIS	2,432.0	-3.1%
WELSPUNLIV	177.8	5.7%	COLPAL	1,903.0	-3.1%
SCHNEIDER	1,274.4	5.1%	NSLNISP	40.5	-3.0%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	15,566.07	12,986.76	2,579.31
FII	13,543.30	11,891.77	1,651.53

Category	18-Aug-26	17-Aug-26	14-Aug-26	13-Aug-26	12-Aug-26	11-Aug-26
DII	2,579.31	5,101.46	356.40	4,353.09	5,841.66	24.77
FII	1,651.53	-2,535.10	508.12	-510.69	-1,002.50	258.55

DAILY MORNING REPORT

Wednesday, August 19, 2026

DERIVATIVE REPORT

- Nifty declined by 0.55% with Nifty future added 5.99 lakh shares in open interest and stock
- Stock future added 1116.5 Lakh shares in open interest.
- Nifty PCR decreased to 0.77 from 0.99
- Total Nifty Calls added 1151.2 lakh shares in open interest.
- Total Nifty Puts added 242.4 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. 1,651.53 Cr (provisional), while DIIs bought net Rs. 2,579.31 Cr in cash market
- FII sold net Rs. 29086.37 Cr in F&O
- Securities in Ban Period: - BANDHANBNK, LICI, MANAPPURAM, SAIL

NIFTY TRACKER

	18-Aug-26	17-Aug-26	14-Aug-26	13-Aug-26
Spot	24,154.9	24,287.7	24,366.0	24,395.9
% Change in Spot	-0.55%	-0.32%	-0.12%	-0.16%
Nifty(FUT) Aug.	24230.1	24392.7	24449.6	24468.0
Nifty(FUT) Aug. Vol.	33918	34812	25199	21683
Nifty(FUT) Aug. - OI	13031720	12770940	12731485	12714650
Nifty(FUT) Sept.	24359.9	24533.5	24587.0	24602.0
Nifty(FUT) Sept. Vol.	9198	6133	5168	3541
Nifty(FUT) Sept. - OI	2184715	1907490	1758965	1587430

TRADE STATISTICS FOR 18-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	10,55,193	73,16,516	-
Index Options	27,71,73,783	47,44,648	1.01
Stock Options	78,95,941	5,95,319	0.49
Index Futures	63,402	10,28,756	-
NSE F&O Total Turnover	28,61,88,319	1,36,85,239	0.99
NSE Cash Turnover	-	1,09,467	-
BSE Cash Turnover	-	10,94,199	-
Total Turnover	-	1,48,88,905	-

DAILY MORNING REPORT

Wednesday, August 19, 2026

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	18-Aug-26		17-Aug-26		14-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	-2,029	1,828	-785	679	-1,315	587
Index option	-24,163	-89,783	8,423	26,312	5,589	38,650
Stock Future	-1,753	-618	147	1,314	-174	-118
Stock option	-1,141	-300	-429	2,384	-532	43,004
Total	**-29,086**	**-88,873**	**7,356**	**30,689**	**3,568**	**82,124**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	18-Aug-26	17-Aug-26	14-Aug-26	13-Aug-26	12-Aug-26
Index Futures	1,687	165	529	695	1,582
Index Options	1,137	3,559	120	2,256	4,816
Stock Futures	3,55,837	1,28,733	1,14,372	1,66,474	-5,82,231
Stock Options	2,291	3,684	8,995	11,798	14,488
F&O Total	**3,60,952**	**1,36,141**	**1,24,016**	**1,81,223**	**-5,61,345**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDEA	5,30,49,45,975	5,48,42,76,750	14.2	3.13%	3.38%
BEL	7,99,26,825	8,72,85,525	413.3	0.05%	9.21%
MOTHERSON	11,40,27,150	11,88,85,650	170.0	0.51%	4.26%
ADANIPOWER	15,36,75,950	15,61,39,650	206.8	1.01%	1.60%
VBL	4,95,94,950	5,20,02,150	438.3	0.24%	4.85%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IREDA	8,52,87,200	8,69,93,125	113.9	-1.77%	2.00%
SUZLON	45,37,58,300	45,52,31,500	47.7	-2.85%	0.32%
INOXWIND	10,70,08,000	10,83,52,000	74.9	-4.71%	1.26%
TMPV	7,90,86,400	7,97,95,200	324.1	-2.25%	0.90%
IRFC	9,24,63,700	9,30,71,300	85.9	-1.71%	0.66%

DAILY MORNING REPORT

Wednesday, August 19, 2026

NIFTY OPTION OPEN INTEREST STATISTICS

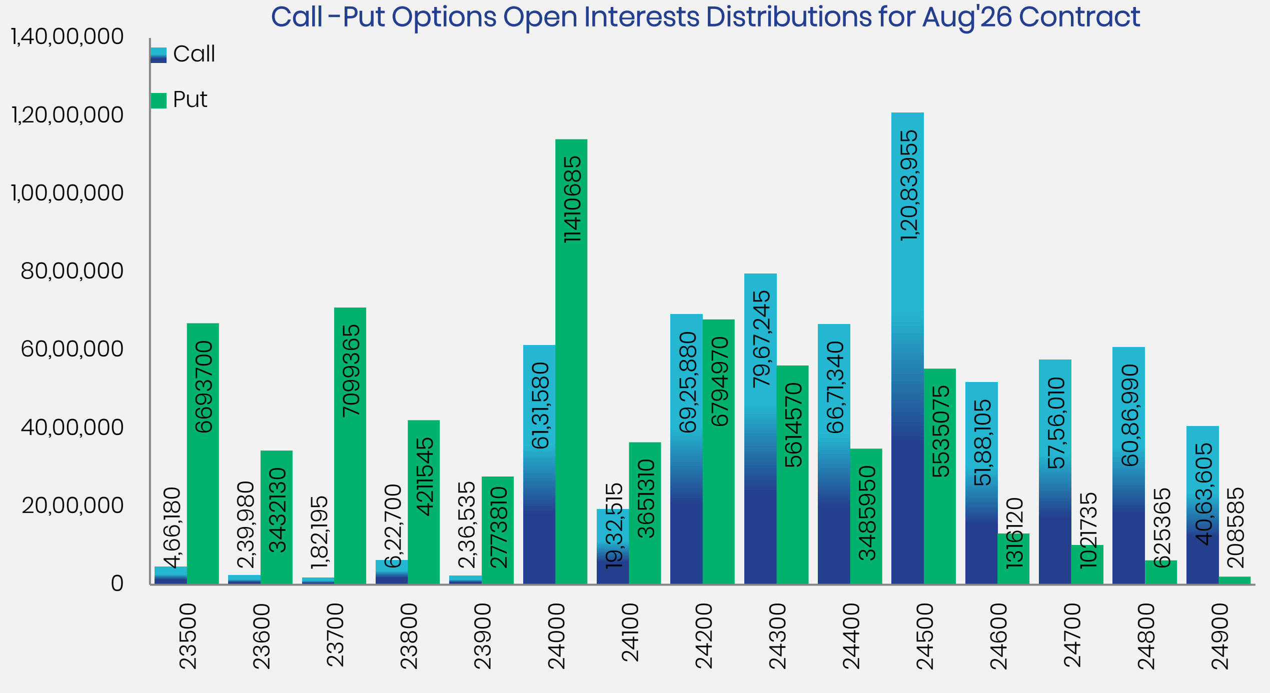
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
25-Aug-26	24,200	CE	144.65	5,03,567	69,25,880	54,37,640
25-Aug-26	24,300	CE	95.60	4,53,723	79,67,245	48,14,680
25-Aug-26	25,500	CE	1.80	2,40,094	94,06,735	45,15,485
25-Aug-26	25,000	CE	4.40	3,60,135	1,38,77,370	32,85,360
25-Aug-26	24,500	CE	35.55	4,07,251	1,20,83,955	30,81,065
25-Aug-26	24,450	CE	45.60	1,60,950	37,82,805	29,22,465
25-Aug-26	23,700	PE	13.00	2,79,748	70,99,365	28,35,235
25-Aug-26	24,200	PE	117.90	5,64,365	67,94,970	23,69,055
25-Aug-26	24,400	CE	59.15	3,17,600	66,71,340	22,51,990
25-Aug-26	25,300	CE	2.30	1,33,775	40,09,850	21,46,300

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
25-Aug-26	23,300	PE	4.00	65,722	13,11,115	-2,77,615
25-Aug-26	24,500	PE	307.25	84,300	55,35,075	-1,84,470
25-Aug-26	24,400	PE	232.45	1,16,546	34,85,950	-1,83,365
29-Sep-26	25,500	CE	30.65	25,942	24,16,960	-1,82,130
27-Oct-26	25,500	CE	97.60	9,716	7,06,940	-1,41,050
25-Aug-26	24,700	PE	488.55	12,652	10,21,735	-1,25,905
25-Aug-26	24,450	PE	270.45	16,245	4,80,805	-1,24,605
27-Oct-26	25,100	CE	186.90	3,229	54,275	-1,00,425
29-Sep-26	27,000	CE	5.05	3,760	16,57,175	-81,705
25-Aug-26	24,550	PE	351.95	6,341	2,66,370	-63,635

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
IDEA	29-Sep-26	16	PE	1.85	399	4,33,13,850	2,71,60,500
IDEA	29-Sep-26	14	CE	0.83	2,192	12,27,94,050	2,43,72,975
IDEA	29-Sep-26	15	CE	0.43	1,952	13,18,71,375	2,35,15,275
IDEA	29-Sep-26	16	CE	0.22	1,188	8,58,41,475	1,94,41,200
IDEA	29-Sep-26	13	CE	1.48	633	4,36,71,225	1,57,24,500
YESBANK	25-Aug-26	23	CE	0.14	1,700	9,11,85,200	78,68,300
IDEA	25-Aug-26	17	CE	0.00	589	5,08,90,200	52,17,675
IDEA	29-Sep-26	13	PE	0.19	821	5,63,22,300	41,45,550
INOXWIND	25-Aug-26	78	CE	0.67	4,586	83,58,400	41,02,400
SUZLON	25-Aug-26	50	CE	0.22	2,716	4,55,29,500	32,51,200

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	14	CE	0.35	11,136	35,04,41,925	-6,92,59,275
IDEA	25-Aug-26	13	CE	1.18	2,339	17,25,40,650	-4,33,13,850
IDEA	25-Aug-26	12	PE	0.01	1,343	16,66,08,225	-2,38,01,175
IDEA	25-Aug-26	15	PE	0.93	765	6,89,73,375	-1,72,96,950
IDEA	25-Aug-26	14	PE	0.20	6,217	21,64,97,775	-1,40,80,575
IDEA	25-Aug-26	16	CE	0.03	2,690	10,60,68,900	-59,32,425
YESBANK	25-Aug-26	22	PE	0.10	1,089	3,80,66,400	-41,36,300
IDEA	25-Aug-26	13	PE	0.03	3,908	22,47,88,875	-37,88,175
IDEA	25-Aug-26	12	CE	2.14	119	2,08,70,700	-36,45,225
PNB	25-Aug-26	124	CE	0.17	755	20,88,000	-35,92,000

DAILY MORNING REPORT

Wednesday, August 19, 2026

ANALYST CERTIFICATION

The undersigned analyst hereby certifies that all the opinions presented in this report accurately reflect their personal views regarding the subject securities, issuers, products, sectors, or industries. No part of their compensation has been, is, or will be directly or indirectly tied to specific recommendations or views expressed in this report. The analyst assumes primary responsibility for the creation of this research report and has diligently endeavored to establish and maintain independence and objectivity in formulating any recommendations.

Krishna Kumar Agarwal

Digitally signed by Krishna Kumar Agarwal
Date: 2026.08.19 08:43:41 +05'30'

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.

Ashika Stock Services Limited (ASSL) commenced its operations in 1994 and is currently a trading and clearing member of various prominent stock exchanges, including BSE Limited (BSE), National Stock Exchange of India Limited (NSE), Metropolitan Stock Exchange of India Limited (MSEI), National Commodity and Derivative Exchange (NCDEX), and Multi Commodity Exchange (MCX). ASSL is dedicated to offering a comprehensive range of services to its esteemed clients, encompassing broking services, depository services (both CDSL and NSDL), and the distribution of financial products such as mutual funds, IPOs, and bonds.

Recognized as a "Research Entity" under SEBI (Research Analyst) Regulations 2014 since 2015 (Registration No. INH000000206), ASSL operates as a wholly-owned subsidiary of Ashika Global Securities (P) Ltd., a non-deposit-taking NBFC company registered with the Reserve Bank of India (RBI). The broader Ashika Group, with detailed information available on our website (www.ashikagroup.com), serves as an integrated financial service provider involved in diverse activities, including Investment Banking, Corporate Lending, Debt Syndication, and other advisory services.

Over the past three years, ASSL has not faced any substantial or material disciplinary actions imposed by regulatory authorities. Nonetheless, routine inspections conducted by SEBI, Exchanges, and Depositories have identified certain operational deviations. In response to these observations, advisory letters or minor penalties have been issued by the relevant authorities.

DISCLOSURE

ASSL prepares and distributes research reports solely in its capacity as a Research Analyst under SEBI (Research Analyst) Regulations 2014. The disclosures and disclaimer provided herein are integral components of all research reports being disseminated.

1) ASSL, its associates, and its Research Analysts (including their relatives) may hold a financial interest in the subject company(ies). This financial interest extends beyond merely having an open stock market position and may include acting as an advisor to, or having a loan transaction with, the subject company(ies), in addition to being registered as clients.

2) ASSL and its Research Analysts (including their relatives) do not possess any actual or beneficial ownership of 1% or more of securities in the subject company(ies) at the conclusion of the month immediately preceding the publication date of the source research report or the date of the relevant public appearance. Nevertheless, it is noted that associates of ASSL may hold actual or beneficial ownership of 1% or more of securities in the subject company(ies).

3) ASSL and its Research Analysts (including their relatives) do not possess any other material conflict of interest at the time of publishing the source research report or the date of the relevant public appearance. It is important to note, however, that associates of ASSL may have an actual or potential conflict of interest, distinct from ownership considerations.

4) ASSL or its associates may have received compensation for investment banking, merchant banking, and brokerage services, from the subject companies within the preceding 12 months. However, it is important to clarify that neither ASSL, its associates, nor its Research Analysts (who are part of the Research Desk) have received any compensation or other benefits from the subject companies or third parties in relation to the specific research report or research recommendation. Furthermore, Research Analysts have not received any compensation from the companies mentioned in the research report or recommendation over the past twelve months.

5) The subject companies featured in the research report or recommendation may be a current client of ASSL or may have been a client within the twelve months preceding the date of the relevant public appearance, particularly for investment banking, merchant banking, or brokerage services.

6) ASSL or its Research Analysts have not been involved in managing or co-managing public offerings of securities for the subject company(ies) within the past twelve months. However, it is worth noting that associates of ASSL may have managed or co-managed public offerings of securities for the subject company(ies) in the past twelve months.

7) Research Analysts have not held positions as officers, directors, or employees of the companies mentioned in the report or recommendation.

8) Neither ASSL nor its Research Analysts have been engaged in market making activity for the companies mentioned in the report / recommendation.

DISCLAIMER

The research recommendations and information provided herein are intended solely for the personal use of the authorized recipient and should not be construed as an offer document or as investment, legal, or taxation advice, nor should it be considered a solicitation of any action based upon it. This report is strictly not for public distribution or use by any individual or entity in jurisdictions where such distribution, publication, availability, or utilization would contravene the law, regulation, or be subject to registration or licensing requirements. Recipients of this report will not be treated as customers merely by virtue of receiving it. The content is derived from information obtained from public sources deemed reliable, but we do not guarantee its accuracy or completeness. All estimates, expressions of opinion, and other subjective judgments contained herein are as of the date of this document and are subject to change without notice.

Recipients should conduct their own investigations and due diligence. ASSL disclaims any responsibility for any loss or damage that may result from inadvertent errors in the information contained in this report. Past performance should not be relied upon as a guide for future performance; future returns are not guaranteed, and the possibility of loss of capital exists.