DAILY MORNING REPORT

Thursday, August 20, 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 23783
- Crucial moving average of 20/50 SMA are at 24328 and 24139
- 200 SMA trend deciding level exist at 24704

Indian Equity Market Performance

Indian equity markets ended lower on Wednesday to extend losses for a seventh straight session as elevated oil prices and rising global bond yields amid an apparent impasse in Middle East peace talks dented investors' appetite for riskier assets.

Sectoral Front Performance

On the Sectoral front Nifty IT bucked the trend, gaining about 0.7%, while financials and other major sectors remained under pressure.

Technical Analysis

Nifty 50 extended its weak trend, forming a bearish candle with minor shadows on the daily chart and continuing its lower-high, lower-low pattern from the August swing high. The index remained below all key moving averages, while the RSI slipped to 42 and the MACD moved towards the zero line, signalling strengthening bearish momentum. The index further dipped below the 61.8% Fibonacci retracement level of 24,050 intraday, it managed to close above it. A decisive break below the 24,050–24,000 zone could trigger a decline towards 23,850 and subsequently 23,600. On the upside, 24,200 remains the immediate hurdle; a sustained move above it is needed to improve the near-term outlook.

Option Activity

On option front, maximum Put OI is at 24000 followed by 24100 strike, while maximum Call OI is at 24200 followed by 24300 strike. Call writing was seen at 24100 strike, followed by 24200 strike while Put writing was seen at 24100 strike, followed by 24000.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	53463	119.7	0.22
Nasdaq	26331	41.4	0.16
S&P 500	7708	16.2	0.21
FTSE 100	10743	15.3	0.14
DAX	26091	-37.0	-0.14
Hang Seng	25634	138.4	0.54
Nikkei	66012	685.6	1.05
Sensex	76910	-325.8	-0.42
Nifty	24078	-76.6	-0.32

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,545.0	0.30	0.01
Silver ($/Oz)	67.53	0.96	1.45
Brent Crude ($/bl)	92.16	0.54	0.59
Dollar Index	98.76	0.02	0.02
USD/INR	95.63	-0.12	-0.13
USD/YEN	158.43	0.25	0.16
EUR/USD	1.17	0.00	-0.02

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	75992	76322	76909	77642	78302
Nifty	23800	23900	24078	24300	24500
Nifty Fut	23839	23939	24117	24339	24539

Pivot Level	
Sensex	77027
Nifty	24092

ECONOMY NEWS

The Cabinet Committee on Economic Affairs on Wednesday approved five railway and highway projects worth ₹13,041 crore. These projects aim to increase infrastructure capacity in West Bengal, Odisha, Andhra Pradesh, Tamil Nadu, and Bihar. (BS)

India's organised employment market is shrinking for freshers even as short-term jobs see a rise owing to higher attrition, according to staffing firm Quess Corp's FY26 Pulse Report, released on Wednesday. Employers are increasingly prioritising professionals with four to 10 years of experience, the report said. In the global capability centre (GCC) segment, the share of fresher hiring fell to 15 per cent in 2025 from 28 per cent in 2024, as companies increasingly sought specialised and "deployment-ready" talent. (BS)

India needs to attract more foreign capital and deepen its corporate bond market to support its growth ambitions and strengthen its position as a key financial centre, Alok Tiwari, joint secretary, Department of Economic Affairs (DEA), said. (BS)

The Centre on Wednesday approved four major railway multitracking projects involving an investment of around ₹9,450 crore for adding nearly 410 km to the Indian Railways network and easing congestion on some of the country's key passenger and freight corridors. (BS)

The renewable energy bidding activity slumped to 14.7 gigawatt (GW) of capacity awarded in 2025-26 from 40.6 GW in 2024-25, amid challenges in the signing of power purchase agreements (PPAs) and power sale agreements (PSAs), and lagging transmission infrastructure, rating agency ICRA said on Wednesday. The slowdown in bidding activity continued in the current year, with 4.7 GW awarded till August 10, 2026, it added. (BS)

After a gap of almost 10 years, India is set to import around 1 million tonnes (mt) of raw sugar at nil duty to cool down domestic prices, with the benchmark ex-mill price in Maharashtra reaching a high of ₹5,400-5,560 per quintal. The steep rise in prices since March 2026, just as the country is entering the high-consumption festival period, is largely attributed to bone-dry pipeline stocks with mills as consumption exceeded production in the 2025-26 season that started on October 1, 2025.

CORPORATE NEWS

BSE has entered into an agreement with MSCI for a number of its indexes. The exchange will explore the launch of futures and options contracts in India linked to these indexes, subject to regulatory approvals. The move aims to offer investors an additional avenue to access and hedge their exposure to the Indian market.

Hyundai Motor India has planned to increase the prices of its vehicles by up to 1% across its portfolio, effective September 2026. Price revision has been necessitated by a combination of rising input and commodity costs and continuing geopolitical uncertainties.

Hexaware Technologies has announced Zero Vulnerability, a cybersecurity offering built to address a growing problem faced by enterprises. AI is helping vulnerabilities surface faster, while security and engineering teams continue to have finite capacity to investigate and fix them.

Strides Pharma Science has announced that its flagship manufacturing facility in Bengaluru, India, has received the Establishment Inspection Report (EIR) from the USFDA.

Ramco Systems Corporation, USA, a subsidiary of Ramco Systems, announced that Pem-Air, an engine MRO services and accessory repair provider, has selected Ramco Aviation software as the technological foundation for its engine MRO operations.

Escorts Kubota has announced a ₹2,000 crore investment to set up a new manufacturing plant in YEIDA industrial area, Uttar Pradesh.

Ceigall India said its joint ventures secured five Letters of Acceptance (LOAs) from the Ministry of Road Transport & Highways (MoRTH) worth a combined bid cost of Rs 2,423.70 crore for road construction on NH-913 (Frontier Highway) in Arunachal Pradesh.

Titagarh Rail Systems has been included in the Approved Vendor category of Indian Railways for supply of 3-phase asynchronous traction motor type 6FRA-6068 for 3-phase locomotives, with an approved capacity of 1,200 numbers per annum.

EMS has received the lowest bidder status from the Public Health Engineering Department, Government of Rajasthan, for the construction of a water treatment plant in Kota, Rajasthan. The estimated order value is Rs 190.86 crore.

BULK DEALS

- **Aster Dm Quality Care Ltd:** Centella Mauritius Holdings Limited Sell 58100000 Shares @ Rs. 766.17
- **Aster Dm Quality Care Ltd:** Hdfc Mutual Fund Buy 9789107 Shares @ Rs. 766.1
- **Himadri Speciality Chem L:** Vt Capital Market Pvt Ltd Buy 5668897 Shares @ Rs. 736.65
- **Aster Dm Quality Care Ltd:** Citigroup Global Markets Singapore Pte Limited Buy 5288000 Shares @ Rs. 766.1
- **Aster Dm Quality Care Ltd:** Hdfc Mutual Fund Buy 5220857 Shares @ Rs. 766.1
- **Aster Dm Quality Care Ltd:** Integrated Core Strategies Asia Pte Ltd Buy 4994505 Shares @ Rs. 766.14
- **Aster Dm Quality Care Ltd:** Kotak Mahindra Mutual Fund Buy 4568000 Shares @ Rs. 766.1
- **Himadri Speciality Chem L:** Vt Capital Market Pvt Ltd Sell 2463897 Shares @ Rs. 761.99
- **Waterways Leisure Tour L:** Belgrave Investment Fund Sell 698749 Shares @ Rs. 825.11
- **Shiprocket Limited:** Goldman Sachs Fds Goldman Sachs India Eq Portfolio Buy 4024040 Shares @ Rs. 131
- **Behari Lal Engineering L:** 360 One Mutual Fund Buy 505000 Shares @ Rs. 470.13
- **Optimystix Ent India Ltd:** Necta Bloom Vcc - Necta Bloom One Sell 276800 Shares @ Rs. 178.91
- **Pramodini Medicare Ltd:** Beacon Stone Capital Vcc - Beacon Stone I Sell 231600 Shares @ Rs. 119.32
- **Propshop Events And Exh L:** Nova Global Opportunities Fund Pcc - Touchstone Sell 78000 Shares @ Rs. 69.79
- **Tipco:** Inti Capital Vcc - Inti Capital I Sell 145600 Shares @ Rs. 192
- **Glpl:** Vikasa India Eif I Fund - Share Class P Sell 66000 Shares @ Rs. 39.79

DAILY MORNING REPORT

Thursday, August 20, 2026

INSIDER TRADE

Acquisition

- * Alembic Ltd: Nirayu Private Limited, Promoter Group, Acquisition 115719 shares on 18-Aug-26
- * Excelsoft Technologies Ltd: Mysore Sudhindratheertha Adarsh, Promoter Group, Acquisition 30000 shares on 14-Aug-26
- * Godawari Power And Ispat Ltd: N P Agrawal, Promoter, Acquisition 19911155 shares on 17-Aug-26
- * Ncl Industries Ltd-$:, Promoter Group, Acquisition 67261 shares on 17-Aug-26

Disposal

- * Aarti Pharmalabs Ltd: Safechem Enterprises Private Limited, Promoter Group, Disposal 15000 shares on 18-Aug-26

DAILY MORNING REPORT

Thursday, August 20, 2026

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
ICICIAMC	3,290.0	5.9%	GSPL	268.4	-7.1%
GLAXO	3,025.2	5.1%	NETWEB	5,068.4	-5.3%
KAYNES	3,817.0	4.7%	CESC	159.5	-5.1%
RRKABEL	2,910.0	4.5%	ACUTAAS	3,225.0	-4.9%
NAM-INDIA	1,217.0	4.0%	POWERINDIA	33,550.0	-4.9%
CYIENT	891.7	3.9%	CEMPRO	1,263.0	-4.6%
ELGIEQUIP	637.0	3.7%	HEG	708.0	-4.2%
THELEELA	535.9	3.2%	BATAINDIA	721.6	-4.2%
FSL	272.1	3.1%	3MINDIA	33,500.0	-4.1%
CHENNPETRO	1,444.1	2.9%	HSCL	750.1	-4.1%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	17,288.58	13,314.86	3,973.72
FII	12,875.76	12,467.77	407.99

Category	19-Aug-26	18-Aug-26	17-Aug-26	14-Aug-26	13-Aug-26	12-Aug-26
DII	3,973.72	2,579.31	5,101.46	356.40	4,353.09	5,841.66
FII	407.99	1,651.53	-2,535.10	508.12	-510.69	-1,002.50

DAILY MORNING REPORT

Thursday, August 20, 2026

DERIVATIVE REPORT

- Nifty declined by 0.32% with Nifty future added 5.55 lakh shares in open interest and stock
- Stock future added 1535.8 Lakh shares in open interest.
- Nifty PCR increased to 0.81 from 0.77
- Total Nifty Calls shaded 1441.5 lakh shares in open interest.
- Total Nifty Puts shaded 1002.1 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 24500 and 24000 put.
- FII's bought net Rs. 407.99 Cr (provisional), while DIIs bought net Rs. 3,973.72 Cr in cash market
- FII sold net Rs. 22268.80 Cr in F&O
- Securities in Ban Period: - BANDHANBNK, MANAPPURAM, SAIL

NIFTY TRACKER

	19-Aug-26	18-Aug-26	17-Aug-26	14-Aug-26
Spot	24,078.3	24,154.9	24,287.7	24,366.0
% Change in Spot	-0.32%	-0.55%	-0.32%	-0.12%
Nifty(FUT) Aug.	24117.6	24230.1	24392.7	24449.6
Nifty(FUT) Aug. Vol.	38673	33918	34812	25199
Nifty(FUT) Aug. - OI	12922845	13031720	12770940	12731485
Nifty(FUT) Sept.	24238.8	24359.9	24533.5	24587.0
Nifty(FUT) Sept. Vol.	15739	9198	6133	5168
Nifty(FUT) Sept. - OI	2783950	2184715	1907490	1758965

TRADE STATISTICS FOR 19-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	15,44,348	1,03,96,798	-
Index Options	4,51,35,980	23,92,314	0.91
Stock Options	88,98,321	5,80,020	0.53
Index Futures	79,325	12,82,015	-
NSE F&O Total Turnover	5,56,57,974	1,46,51,147	0.83
NSE Cash Turnover	-	1,10,315	-
BSE Cash Turnover	-	9,32,813	-
Total Turnover	-	1,56,94,275	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	19-Aug-26		18-Aug-26		17-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	-2,493	2,150	-2,029	1,828	-785	679
Index option	-19,126	74,653	-24,163	-89,783	8,423	26,312
Stock Future	447	1,278	-1,753	-618	147	1,314
Stock option	-1,097	-3,024	-1,141	-300	-429	2,384
Total	**-22,269**	**75,057**	**-29,086**	**-88,873**	**7,356**	**30,689**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	19-Aug-26	18-Aug-26	17-Aug-26	14-Aug-26	13-Aug-26
Index Futures	1,360	1,687	165	529	695
Index Options	3,344	1,137	3,559	120	2,256
Stock Futures	-5,86,087	3,55,837	1,28,733	1,14,372	1,66,474
Stock Options	-5,044	2,291	3,684	8,995	11,798
F&O Total	**-5,86,428**	**3,60,952**	**1,36,141**	**1,24,016**	**1,81,223**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
YESBANK	1,06,83,78,300	1,13,53,36,600	22.7	0.53%	6.27%
GMRAIRPORT	13,22,66,925	13,55,31,225	102.4	0.39%	2.47%
PNB	25,01,76,000	25,25,28,000	117.3	0.40%	0.94%
MOTHERSON	11,88,85,650	12,07,86,000	171.1	0.61%	1.60%
IDFCFIRSTB	32,07,48,050	32,24,45,375	85.7	0.82%	0.53%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
NMDC	33,03,24,750	34,13,27,250	83.3	-0.96%	3.33%
SAIL	16,03,12,300	16,25,49,500	171.7	-0.61%	1.40%
SWIGGY	7,32,04,400	7,52,15,550	273.0	-0.53%	2.75%
RELIANCE	10,27,34,500	10,46,76,000	1,307.5	-0.98%	1.89%
INOXWIND	10,83,52,000	11,02,84,800	73.9	-1.41%	1.78%

NIFTY OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
25-Aug-26	24,100	CE	125.80	24,62,931	98,64,725	79,32,210
25-Aug-26	24,200	CE	80.40	17,43,779	1,10,84,840	41,58,960
25-Aug-26	24,300	CE	48.80	11,45,333	1,16,09,455	36,42,210
25-Aug-26	24,100	PE	109.10	29,95,866	68,43,460	31,92,150
25-Aug-26	24,050	CE	153.75	12,65,907	32,17,500	31,08,235
25-Aug-26	24,500	CE	17.25	9,51,238	1,48,64,265	27,80,310
25-Aug-26	24,150	CE	101.40	12,58,905	33,65,505	26,14,300
25-Aug-26	25,500	CE	1.45	4,43,967	1,17,23,790	23,17,055
25-Aug-26	25,200	CE	2.05	3,60,165	60,67,555	22,58,750
25-Aug-26	24,000	PE	69.50	25,09,725	1,36,69,110	22,58,425

HIGHEST REDUCTIONS

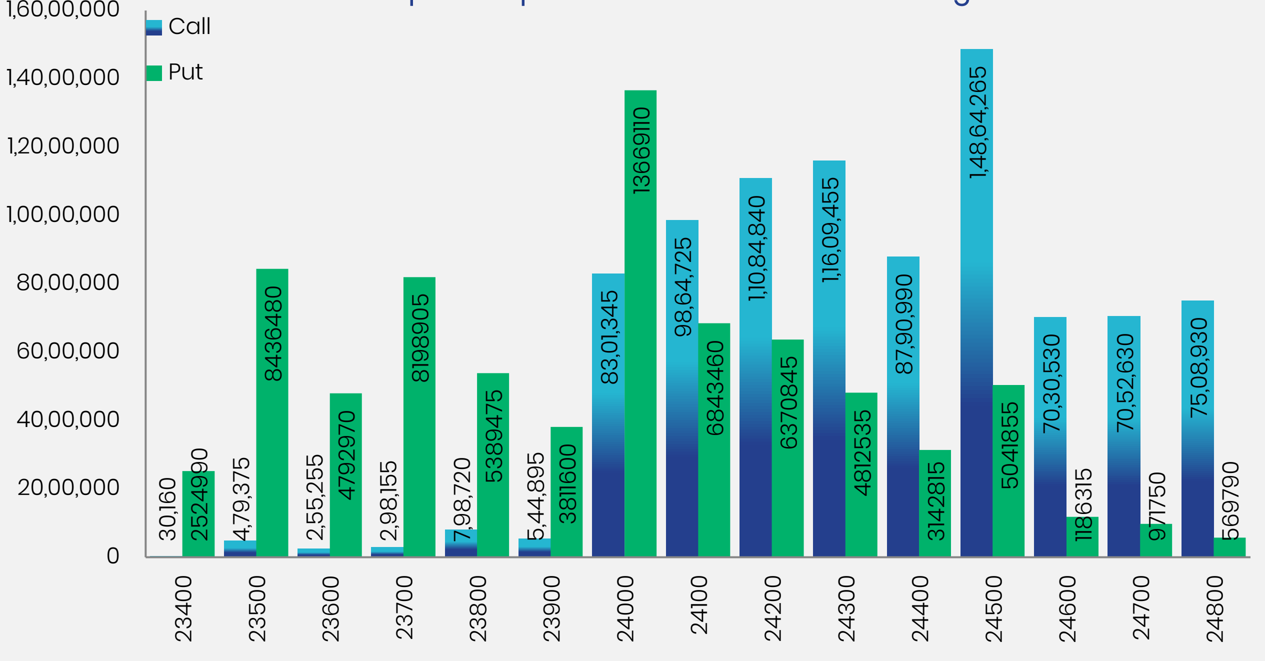
Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
25-Aug-26	24,450	CE	22.15	4,35,554	25,37,535	-12,45,270
25-Aug-26	24,300	PE	231.70	3,33,857	48,12,535	-8,02,035
25-Aug-26	24,500	PE	397.80	62,793	50,41,855	-4,93,220
25-Aug-26	24,200	PE	163.25	11,90,864	63,70,845	-4,24,125
25-Aug-26	24,250	PE	195.90	3,04,957	10,50,010	-4,10,020
25-Aug-26	24,400	PE	312.15	1,05,843	31,42,815	-3,43,135
25-Aug-26	22,000	PE	1.45	54,317	31,31,895	-3,27,535
1-Sep-26	25,000	CE	8.85	52,000	10,91,545	-2,56,490
25-Aug-26	26,000	CE	0.80	1,68,865	78,78,260	-1,57,430
25-Aug-26	23,200	PE	3.65	1,83,622	22,19,880	-1,37,800

DAILY MORNING REPORT

Thursday, August 20, 2026

NIFTY OPTION OPEN INTEREST STATISTICS

Call -Put Options Open Interests Distributions for Aug'26 Contract



DAILY MORNING REPORT

Thursday, August 20, 2026

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	1.94	369	6,48,27,825	2,15,13,975
IDEA	29-Sep-26	15	CE	0.35	1,092	15,15,27,000	1,96,55,625
IDEA	29-Sep-26	14	CE	0.74	943	14,09,48,700	1,81,54,650
IDEA	29-Sep-26	16	CE	0.16	767	10,22,09,250	1,63,67,775
IDEA	25-Aug-26	15	CE	0.05	7,706	34,77,97,350	1,35,80,250
IDEA	29-Sep-26	12	PE	0.07	259	4,36,71,225	74,33,400
IDEA	29-Sep-26	13	CE	1.37	299	5,10,33,150	73,61,925
IDEA	29-Sep-26	14	PE	0.55	447	6,16,82,925	66,47,175
IDEA	25-Aug-26	14	PE	0.17	2,663	22,12,15,125	47,17,350
IRFC	29-Sep-26	89	PE	5.42	866	45,78,700	45,67,850

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	14	CE	0.21	5,197	31,22,02,800	-3,82,39,125
IDEA	25-Aug-26	13	CE	1.05	894	15,33,85,350	-1,91,55,300
YESBANK	25-Aug-26	23	PE	0.48	1,434	6,35,06,200	-1,29,06,500
IDEA	25-Aug-26	15	PE	1.01	528	5,64,65,250	-1,25,08,125
YESBANK	25-Aug-26	23	CE	0.13	3,286	8,08,28,900	-1,03,56,300
IDEA	25-Aug-26	12	PE	0.01	252	15,78,16,800	-87,91,425
YESBANK	25-Aug-26	26	CE	0.01	360	3,24,99,500	-78,37,200
YESBANK	25-Aug-26	22	CE	0.71	586	1,34,66,300	-50,07,100
ADANIPOWER	25-Aug-26	205	CE	1.98	7,577	38,76,600	-48,56,400
YESBANK	25-Aug-26	24	CE	0.03	1,632	7,89,94,000	-43,85,100

DAILY MORNING REPORT

Thursday, August 20, 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

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Date: 2026.08.20 08:37:14 +05'30'

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