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DAILY MORNING REPORT

Friday, August 21, 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 23841
- Crucial moving average of 20/50 SMA are at 24346 and 24160
- 200 SMA trend deciding level exist at 24695

Indian Equity Market Performance

Indian equity markets ended notably higher on Thursday after seven consecutive sessions of losses. A weakening U.S. dollar in international markets and easing global bond yields boosted investor sentiment following a surprise liquidity support announcement by the U.S. Treasury to stem a rout in the bond market.

Sectoral Front Performance

On the Sectoral front IT and financial stocks led the recovery, while realty and FMCG also outperformed as the Nifty snapped its seven-session losing streak.

Technical Analysis

Nifty 50 opened with a gapup posting healthy gains however at the ended forming a Doji-like candlestick on the daily chart, signalling indecision between buyers and sellers. The index reclaimed its 50-day and 100-day EMAs and moved above the 50% Fibonacci retracement level, though it remained below the 20-day and 200-day EMAs.Momentum indicators showed some improvement, with the RSI rising to 48, though still below the neutral 50 mark. The MACD also moved closer to the zero line, suggesting that bearish momentum may be easing.The 24,290–24,320 zone, where the 20-day EMA is placed, is likely to be a key hurdle. A sustained move above 24,320 could trigger a pullback towards 24,450. On the downside, support is seen at 24,130–24,100; a break below this zone may revive the corrective trend and drag the index towards 23,950.

Option Activity

On option front, maximum Put OI is at 24200 followed by 24000 strike, while maximum Call OI is at 24500 followed by 24300 strike. Call writing was seen at 24250 strike, followed by 24350 strike while Put writing was seen at 24200 strike, followed by 24250.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	52759	-703.8	-1.32
Nasdaq	26067	-263.9	-1.00
S&P 500	7641	-66.8	-0.87
FTSE 100	10748	4.8	0.04
DAX	25983	-108.3	-0.42
Hang Seng	25876	177.5	0.69
Nikkei	66015	-263.0	-0.40
Sensex	77538	628.0	0.82
Nifty	24232	153.6	0.64

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,585.70	14.30	0.31
Silver ($/Oz)	69.27	0.38	0.56
Brent Crude ($/bl)	93.91	0.13	0.14
Dollar Index	98.66	-0.16	-0.16
USD/INR	95.79	0.09	0.09
USD/YEN	158.97	-0.08	-0.05
EUR/USD	1.17	0.00	0.15

Support/Resistance levels for Indian Equity Indices	S2	S1	CMP	R1	R2
Sensex	76606	77101	77537	77827	78256
Nifty	23950	24100	24232	24320	24450
Nifty Fut	24011	24161	24293	24381	24511

Pivot Level	
Sensex	77507
Nifty	24227

ECONOMY NEWS

Growth in India’s nine core sectors decelerated to 5.4 per cent in July from an upwardly revised 6 per cent in June, as five of the nine sectors recorded a deterioration in performance compared with the previous month, according to provisional data released by the Ministry of Commerce and Industry on Thursday. (BS)

India and Mexico have finalised the Terms of Reference (ToR) for a proposed preferential trade agreement (PTA), with the formal signing of the roadmap likely to take place soon, a government official said. (BS)

The Reserve Bank of India received strong demand at the variable rate reverse repo (VRRR) auctions on Thursday, with cumulative bids amounting to Rs 1.91 trillion against the total notified amount of Rs 1.5 trillion. (BS)

Competition intensity in Hybrid Annuity Model (HAM) projects is showing the first signs of reduction in recent years after a notification issued by the Ministry of Road Transport and Highways (MoRTH) on July 10 increased package sizes and tightened net worth requirements, according to India Ratings & Research, a credit rating and research agency. (BS)

India is widening its crude oil sourcing to Latin America as disruptions linked to the Iran conflict and the Strait of Hormuz push the world's third-largest oil consumer to diversify supplies, ship tracking data showed. (BS)

The Union government has tightened sugar stockholding limits as prices hit record highs ahead of the festive season, ordering bulk consumers using more than 10 metric tonnes of sugar a month to hold inventories for no more than 15 days. (BS)

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)

At a time when the government is trying to revive private-funded highway building, an association of highway developers has asked the Road Transport and Highways Ministry to reconsider several provisions of the revised build-operate-transfer (BOT)-Toll model. (BS)

CORPORATE NEWS

The government has allowed imports of 1 million tonnes of raw sugar at nil duty to cool down domestic prices, a move it has had to resort to after a gap of almost 10 years. The imports will be permitted till October 31, 2026. India presently imposes a duty of 100 per cent on raw sugar imports.

Mankind Pharma has entered into an exclusive in-licensing and marketing agreement with China's Chongqing Chenan Biopharmaceutical Co Ltd for commercialisation of two insulin analogues in India for diabetes care.

Coal India will soon open an office in Singapore to cater to its overseas investments in critical minerals. The Singapore office will help Coal India Ltd (CIL) expand its critical minerals business, pursue overseas asset acquisitions.

Welspun Corp has secured the largest single order in its history — valued at approx $1.8 billion (₹17,200 crore) — for the supply of pipes from its manufacturing facility in the United States.

Krishna Institute of Medical Sciences (KIMS) has entered into an Operations and Management Agreement with Aurevia Hospitals (AHPL) for an initial term of five years, with an extension for a further five years on an exclusive basis, to run, manage, operate, direct and control Arete Hospitals.

Tata Power Renewable Energy has launched its 'Har Ghar Solar' initiative in Bihar, aiming at facilitating rooftop solar adoption in 5 lakh homes over the next 3 years.

Vedanta Aluminium Metal said it is broadening the availability of high-performance and automotive-grade alloys designed and manufactured in India, enabling vehicle manufacturers to strengthen domestic sourcing and reduce import dependency.

Trudy Holdings, AVP I Fund and Accel are likely to sell a combined 5% stake in Amagi Media Labs through a block deal worth around Rs 600 crore, with a floor price of Rs 550 per share, CNBC-TV18 reported, quoting sources.

Saatvik Green Energy's subsidiary, Saatvik Solar Industries, has received an order worth Rs 190 crore from a renowned independent power producer/EPC player for the supply of solar photovoltaic modules.

BULK DEALS

- **Kfin Technologies Limited:** General Atlantic Singapore Fund Pte Ltd Sell 15135135 Shares @ Rs. 925
- **Kfin Technologies Limited:** Invesco Mutual Fund Buy 4324324 Shares @ Rs. 925
- **Kfin Technologies Limited:** Mirae Asset Mutual Fund Buy 2562162 Shares @ Rs. 925
- **Kfin Technologies Limited:** Kotak Mahindra Mutual Fund Buy 2000000 Shares @ Rs. 925
- **Nxt-Infra Trust:** Actis Highway Infra Limited Sell 19125000 Shares @ Rs. 93.85
- **Kfin Technologies Limited:** Hsbc Mutual Fund Buy 1783784 Shares @ Rs. 925
- **Kfin Technologies Limited:** Edelweiss Mutual Fund Buy 1081081 Shares @ Rs. 925
- **Kfin Technologies Limited:** Motilal Oswal Mutual Fund Buy 983784 Shares @ Rs. 925
- **Nxt-Infra Trust:** Larsen & Toubro Limited Buy 9575000 Shares @ Rs. 93.85
- **Nxt-Infra Trust:** Kotak Mahindra Bank Limited Buy 9550000 Shares @ Rs. 93.85
- **Behari Lal Engineering L:** Mathisys Quantcap Llp Buy 331894 Shares @ Rs. 534.41
- **Behari Lal Engineering L:** Mathisys Quantcap Llp Sell 331894 Shares @ Rs. 534.15
- **Amrutajan Health Ltd:** Envision India Fund Sell 213000 Shares @ Rs. 523.58
- **Propshop Events And Exh L:** Nova Global Opportunities Fund Pcc - Touchstone Sell 230000 Shares @ Rs. 69.51
- **Pfizer:** Quant Mutual Fund Buy 267864 Shares @ Rs. 4899.97
- **Amrutanjan:** Pari Washington India Master Fund, Ltd. Buy 583481 Shares @ Rs. 500
- **Amrutanjan:** Dsp Mutual Fund Sell 500000 Shares @ Rs. 500.01
- **Glpl:** Upsurge Opportunities Fund 1 Sell 51000 Shares @ Rs. 41.2

INSIDER TRADE

Acquisition

- * Stel Holdings Ltd: SOFREAL MERCANTRADE PRIVATE LTD, Promoter Group, Acquisition 164 shares on 19-Aug-26
- * Senco Gold Ltd: Jai Hanuman Shri Siddhivinayak Trust Trustee- Mr. Suvankar Sen & Mrs. Joita Sen , Promoter, Acquisition 3250 shares on 18-Aug-26
- * Liberty Shoes Ltd: Anupam Bansal, Promoter, Acquisition 70000 shares on 17-Aug-26
- * T T Ltd-$: T. T. BRANDS LIMITED, Promoter Group, Acquisition 67775 shares on 19-Aug-26
- * Jay Shree Tea & Industries Ltd: MRS.JAYASHREE MOHTA, Promoter and Director, Acquisition 227 shares on 18-Aug-26
- * Crestchem Ltd: DIPAK NARENDRAPRASAD PATEL, Promoter and Director, Acquisition 500 shares on 19-Aug-26
- * Milkfood Ltd: J HOUSING PRIVATE LIMITED, Promoter Group, Acquisition 43702 shares on 17-Aug-26

Disposal

- * Info Edge (India) Ltd: Kapil Kapoor, Director, Disposal 500000 shares on 18-Aug-26

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NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
BALRAMCHIN	778.0	19.5%	GSPL	268.4	-7.1%
NETWEB	5,411.0	6.8%	HSCL	702.9	-6.3%
MMTC	66.4	6.8%	ASTERDM	765.7	-4.3%
BRIGADE	627.7	6.8%	JBCHEPHARM	2,408.9	-3.9%
MEESHO	209.9	6.6%	SYRMA	1,437.9	-3.8%
COHANCE	475.2	6.3%	CHENNPETRO	1,386.3	-3.7%
HBLENGINE	713.0	6.1%	PFC	363.6	-2.9%
ZEEL	108.2	5.9%	AIIL	535.0	-2.8%
ELECON	452.5	5.5%	BDL	1,314.0	-2.6%
CPPLUS	3,468.6	5.0%	AEGISLOG	1,330.3	-2.5%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	16,932.72	13,395.01	3,537.71
FII	11,411.73	11,995.09	-583.36

Category	20-Aug-26	19-Aug-26	18-Aug-26	17-Aug-26	14-Aug-26	13-Aug-26
DII	3,537.71	3,973.72	2,579.31	5,101.46	356.40	4,353.09
FII	-583.36	407.99	1,651.53	-2,535.10	508.12	-510.69

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DERIVATIVE REPORT

- Nifty gained by 0.64% with Nifty future added 3.03 lakh shares in open interest and stock
- Stock future shaded 1059.0 Lakh shares in open interest.
- Nifty PCR increased to 1.12 from 0.81
- Total Nifty Calls shaded 248.7 lakh shares in open interest.
- Total Nifty Puts shaded 539.7 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 24500 and 24000 put.
- FII's sold net Rs. 583.36 Cr (provisional), while DIIs bought net Rs. 3,537.71 Cr in cash market
- FII bought net Rs. 606 Cr in F&O
- Securities in Ban Period: - BANDHANBNK, MANAPPURAM, SAIL

NIFTY TRACKER

	20-Aug-26	19-Aug-26	18-Aug-26	17-Aug-26
Spot	24,231.9	24,078.3	24,154.9	24,287.7
% Change in Spot	0.64%	-0.32%	-0.55%	-0.32%
Nifty(FUT) Aug.	24293.0	24117.6	24230.1	24392.7
Nifty(FUT) Aug. Vol.	56285	38673	33918	34812
Nifty(FUT) Aug. - OI	10834655	12922845	13031720	12770940
Nifty(FUT) Sept.	24392.6	24238.8	24359.9	24533.5
Nifty(FUT) Sept. Vol.	43506	15739	9198	6133
Nifty(FUT) Sept. - OI	5115240	2783950	2184715	1907490

TRADE STATISTICS FOR 20-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	44,47,711	3,01,30,764	-
Index Options	4,79,28,161	19,68,402	0.98
Stock Options	94,47,233	6,01,790	0.50
Index Futures	1,38,452	22,48,885	-
NSE F&O Total Turnover	6,19,61,557	3,49,49,841	0.88
NSE Cash Turnover	-	1,10,062	-
BSE Cash Turnover	-	9,36,669	-
Total Turnover	-	3,59,96,572	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	20-Aug-26		19-Aug-26		18-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	-363	460	-2,493	2,150	-2,029	1,828
Index option	-2,460	19,400	-19,126	74,653	-24,163	-89,783
Stock Future	3,243	7,671	447	1,278	-1,753	-618
Stock option	185	-4,664	-1,097	-3,024	-1,141	-300
Total	**605**	**22,867**	**-22,269**	**75,057**	**-29,086**	**-88,873**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	20-Aug-26	19-Aug-26	18-Aug-26	17-Aug-26	14-Aug-26
Index Futures	912	1,360	1,687	165	529
Index Options	1,334	3,344	1,137	3,559	120
Stock Futures	73,061	-5,86,087	3,55,837	1,28,733	1,14,372
Stock Options	-12,249	-5,044	2,291	3,684	8,995
F&O Total	**63,058**	**-5,86,428**	**3,60,952**	**1,36,141**	**1,24,016**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
SAIL	15,46,72,300	17,07,65,100	175.0	1.93%	10.40%
CANBK	26,64,36,000	28,20,08,250	129.6	0.71%	5.84%
AXISBANK	7,89,25,000	9,41,41,250	1,250.0	0.95%	19.28%
IDFCFIRSTB	31,14,82,325	32,62,48,125	86.2	0.61%	4.74%
KOTAKBANK	14,05,78,000	15,48,74,000	398.8	1.77%	10.17%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
TATAPOWER	5,50,59,400	6,35,50,600	374.9	-0.82%	15.42%
IOC	14,17,69,875	14,73,61,500	135.8	-0.48%	3.94%
ASHOKLEY	12,61,10,000	13,10,75,000	173.7	-0.06%	3.94%
NAUKRI	1,24,28,900	1,50,03,450	1,361.9	-0.85%	20.71%
FEDERALBNK	8,19,00,000	8,34,60,000	356.2	-1.03%	1.90%

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NIFTY OPTION OPEN INTEREST STATISTICS

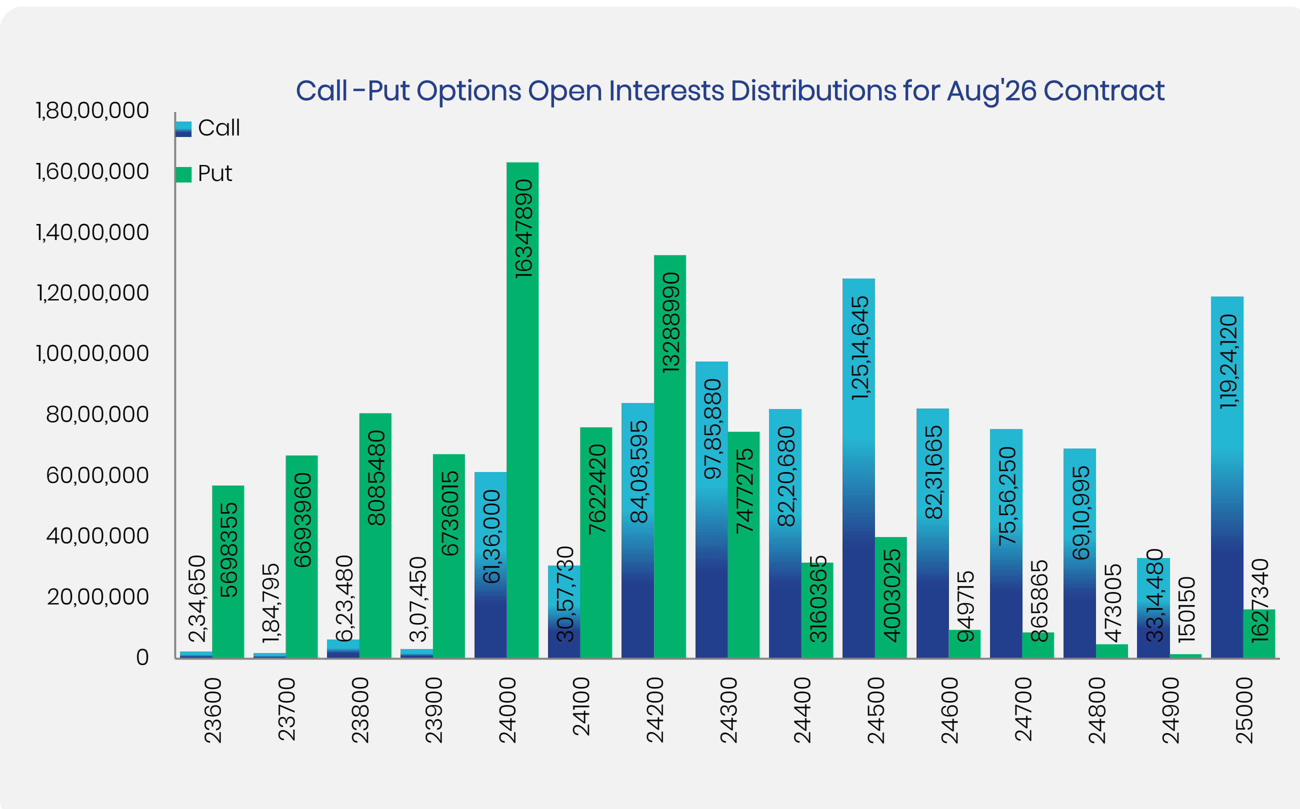
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
25-Aug-26	24,200	PE	56.35	30,30,619	1,32,88,990	69,18,145
25-Aug-26	24,250	PE	74.20	16,33,659	49,77,505	39,27,495
25-Aug-26	23,900	PE	10.45	5,59,906	67,36,015	29,24,415
25-Aug-26	24,150	PE	42.55	9,11,666	46,52,050	27,28,635
25-Aug-26	23,800	PE	6.65	6,36,890	80,85,480	26,96,005
25-Aug-26	24,000	PE	18.40	11,44,062	1,63,47,890	26,78,780
25-Aug-26	24,300	PE	96.05	14,48,371	74,77,275	26,64,740
25-Aug-26	23,850	PE	8.15	2,99,207	37,82,155	21,47,990
25-Aug-26	23,400	PE	2.90	4,10,590	41,99,910	16,74,920
25-Aug-26	22,000	PE	1.05	1,61,850	46,53,090	15,21,195

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
25-Aug-26	24,100	CE	224.85	6,62,625	30,57,730	-68,06,995
25-Aug-26	25,500	CE	0.60	3,99,374	87,99,505	-29,24,285
25-Aug-26	24,200	CE	150.45	23,11,365	84,08,595	-26,76,245
25-Aug-26	25,000	CE	1.45	9,86,702	1,19,24,120	-26,70,980
25-Aug-26	24,050	CE	267.20	1,62,505	6,13,795	-26,03,705
25-Aug-26	24,900	CE	1.70	7,67,529	33,14,480	-25,30,125
25-Aug-26	24,500	CE	21.90	13,40,280	1,25,14,645	-23,49,620
25-Aug-26	24,000	CE	310.75	2,32,134	61,36,000	-21,65,345
25-Aug-26	24,150	CE	185.90	5,60,677	12,52,290	-21,13,215
25-Aug-26	24,300	CE	89.60	19,07,612	97,85,880	-18,23,575

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	29-Sep-26	14	CE	0.76	1,054	17,03,24,925	2,93,76,225
IDEA	29-Sep-26	15	CE	0.36	937	17,11,11,150	1,95,84,150
IDEA	29-Sep-26	14	PE	0.53	482	7,72,64,475	1,55,81,550
IDEA	29-Sep-26	16	CE	0.16	708	11,77,19,325	1,55,10,075
IDEA	29-Sep-26	16	PE	2.29	243	7,89,79,875	1,41,52,050
IDEA	29-Sep-26	13	PE	0.20	364	6,08,25,225	78,62,250
IDFCFIRSTB	29-Sep-26	90	CE	1.35	1,715	1,18,34,900	66,22,350
YESBANK	29-Sep-26	23	PE	0.64	365	1,64,51,900	65,62,100
IDEA	25-Aug-26	15	CE	0.03	6,035	35,42,30,100	64,32,750
IDEA	29-Sep-26	13	CE	1.41	250	5,71,80,000	61,46,850

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	14	CE	0.14	5,389	25,10,91,675	-6,11,11,125
IDEA	25-Aug-26	13	CE	1.10	778	12,26,51,100	-3,07,34,250
IDEA	25-Aug-26	14	PE	0.08	2,997	19,30,53,975	-2,81,61,150
IDEA	25-Aug-26	13	PE	0.01	1,224	20,83,49,625	-1,52,24,175
YESBANK	25-Aug-26	23	CE	0.11	2,448	6,56,83,200	-1,51,45,700
IDEA	25-Aug-26	15	PE	0.93	302	4,38,85,650	-1,25,79,600
SUZLON	25-Aug-26	60	CE	0.01	1,560	2,90,44,900	-1,22,68,200
IDEA	25-Aug-26	16	CE	0.01	750	9,84,21,075	-1,21,50,750
IDEA	25-Aug-26	12	PE	0.01	302	14,98,83,075	-79,33,725
YESBANK	25-Aug-26	23	PE	0.33	971	5,62,91,000	-72,15,200

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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: 2026.08.21 08:48:13 +05'30'

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