SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY WEEKLY REPORT

05th September 2026

Market Snapshot

KEY INDICES	04-Sep-26	28-Aug-26	%Ch
S&P CNX NIFTY	23897.70	24175.65	-1.15
SENSEX	76515.43	77264.51	-0.97
NIFTY MIDCAP 100	63079.05	64069.50	-1.55
NIFTY SMLCAP 100	20095.45	20080.00	0.08

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	04-Sep-26	28-Aug-26	%Ch
NIFTY BANK	57369.65	57496.30	-0.22
NIFTY AUTO	27710.90	28851.80	-3.95
NIFTY FMCG	45892.75	46815.00	-1.97
NIFTY IT	30695.10	31281.70	-1.88
NIFTY METAL	13317.45	13525.35	-1.54
NIFTY PHARMA	26478.10	26991.85	-1.90
NIFTY REALTY	907.90	908.85	-0.10
BSE CG	77868.58	79514.98	-2.07
BSE CD	63243.97	65066.70	-2.80
BSE Oil & GAS	26169.67	25977.70	0.74
BSE POWER	7475.80	7512.83	-0.49

(Source: Investing.com)

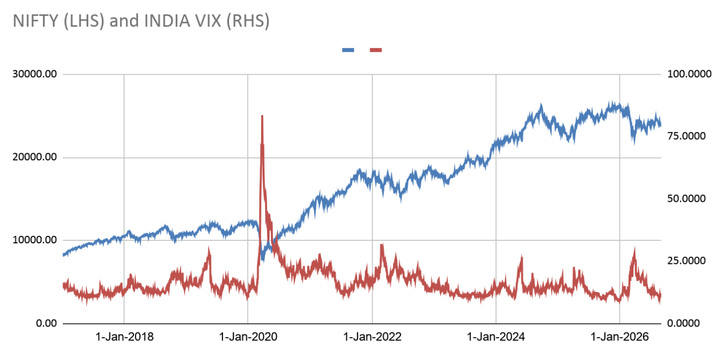
FII & DII Activities (Rs Crore)

28/08/2026 to 04/09/2026

Activities	FIIs	DIIs
Buy	146061.95	105862.98
Sell	153918.35	77522.67
Net	-7856.40	28340.31

(Source: Capitaline)

Nifty Vs. INDIA VIX



(Source: NSE)

Markets end lower for week amid mixed global cues

Indian equity markets closed lower for the week, with the key benchmarks coming under pressure through most of the trading sessions. In the week ended on Friday, 04 September 2026, the S&P BSE Sensex declined 749.08 points or 0.97% to settle at 76,515.43. The Nifty 50 index lost 277.95 points or 1.15% to settle at 23,897.70. The BSE 150 Mid-Cap index fell 1.36% to close at 17,098.91. The BSE 250 Small-Cap shed 0.21% to end at 7,264.06.

India's real GDP grew 7.8% year-on-year in Q1 FY27 (April-June 2026), beating the Reserve Bank of India's 7% projection. Real Gross Value Added (GVA) grew 8.2%, with manufacturing and financial services among the key drivers. GDP growth moderated from the revised 8.6% recorded in Q4 FY26. The stronger-than-expected growth points to resilient domestic economic activity, although investors will continue to track crude oil prices, inflation and geopolitical risks.

Sensex Gainers - Weekly

SCRIPS	04-Sep-26	28-Aug-26	%Ch
RELIANCE	1322.00	1284.40	2.93
TATASTEEL	189.00	186.20	1.50
INDUSINDBK	1006.00	992.90	1.32
AXISBANK	1273.00	1264.00	0.71
NTPC	332.60	331.50	0.33

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	04-Sep-26	28-Aug-26	%Ch
MARUTI	12700.00	13385.50	-5.12
M&M	3168.90	3332.40	-4.91
TITAN	5010.00	5165.00	-3.00
ASIANPAINT	2527.75	2602.00	-2.85
SBIN	1017.00	1046.05	-2.78

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	04-Sep-26	28-Aug-26	%Ch
COALINDIA	415.35	401.00	3.58
RELIANCE	1322.00	1287.00	2.72
UPL	582.15	571.00	1.95
INDUSINDBK	1008.50	994.00	1.46
GAIL	173.40	171.10	1.34

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	04-Sep-26	28-Aug-26	%Ch
HEROMOTOCO	5300.00	5600.00	-5.36
EICHERMOT	7630.50	8059.00	-5.32
MARUTI	12694.00	13376.00	-5.10
M&M	3170.00	3334.00	-4.92
BRITANNIA	5101.50	5308.50	-3.90

(Source: Capitaline)

India's HSBC Manufacturing PMI eased to 52.8 in August 2026 from 53.5 in July, revised down from the preliminary reading of 52.9. The HSBC Services PMI was revised to 54.1 from the flash estimate of 54.5, up from 53.3 in July, as higher demand and new business supported growth. Separately, India's HSBC Composite PMI stood at 54.3 in August 2026, down from the flash estimate of 54.6 but unchanged from July.

The Reserve Bank of India (RBI) on Wednesday said forex inflows under its special USD-INR forex swap facility stood at $136.38 billion as of 31 August 2026, according to provisional data reported by authorised dealer banks. The inflows included $127.23 billion through Foreign Currency Non-Resident (Bank) [FCNR(B)] deposits, while overseas foreign currency borrowings (OFCBs) contributed $5.26 billion and external commercial borrowings (ECBs) accounted for $3.89 billion.

Global Markets:

US economic data released overnight presented a mixed picture. The ISM Manufacturing PMI eased to 54.6 in August from 55.6 in July, indicating that manufacturing activity continued to expand, but at a slower pace. The New Orders Index declined to 53.7 from 56.7, while the Employment Index fell to 51.2 from 52.8. The Prices Index remained elevated at 71.1, pointing to continued input-cost pressures.

The US labour market remained relatively resilient, with job openings rising by 89,000 to 7.271 million in July. However, hiring fell by 278,000 to 5.054 million, while the hires rate declined to 3.2%, suggesting some moderation in labour-market momentum despite continued demand for workers.

US Private-sector employment increased by 38,000 in August, according to the ADP National Employment Report. The figure was below market expectations of 48,000 and down from a revised 46,000 increase in July. Manufacturing

Nifty Midcap 100 Gainers - Weekly

SCRIPS	04-Sep-26	28-Aug-26	%Ch
IGL	158.04	147.61	7.07
TORNTPOWER	1299.10	1217.70	6.68
LICHSGFIN	562.05	535.00	5.06
IDFCFIRSTB	86.71	83.12	4.32
TATACOMM	1756.10	1694.70	3.62

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	04-Sep-26	28-Aug-26	%Ch
ZEEL	91.61	101.51	-9.75
POLYCAB	8300.00	9088.00	-8.67
ZYDUSLIFE	1120.00	1191.00	-5.96
DALBHARAT	1749.30	1845.30	-5.20
LAURUSLABS	1840.00	1938.50	-5.08

(Source: Capitaline)

World Markets

KEY INDICES	04-Sep-26	28-Aug-26	%Ch
DJIA	53414.25	53559.99	-0.27
NASDAQ	26506.99	26402.42	0.40
BOVESPA	185147.16	175664.62	5.40
FTSE 100	10831.09	10824.26	0.06
CAC 40	8278.77	8401.18	-1.46
DAX	26046.40	26569.99	-1.97
MOEX RUSSIA	2253.41	2114.93	6.55
NIKKEI 225	65020.94	66405.56	-2.09
HANG SENG	25650.87	25584.79	0.26
STRAITS TIMES	5801.96	5699.93	1.79
SHANGHAI COMPOSITE	3930.12	3952.18	-0.56
JAKARTA	6636.48	6518.12	1.82

(Source: Capitaline, Investing.com)

employment fell by 17,000, while education and health services added 45,000 jobs.

China's manufacturing activity remained in contraction for a second consecutive month in August, although the pace of decline eased. The official manufacturing purchasing managers' index rose to 49.8 from 49.2 in July, remaining below the 50 mark that separates expansion from contraction. The reading was also better than economists' expectations.

(Source: Capitaline)

Outlook and Technical View

Global developments, including the evolving U.S.-Iran conflict, movements in crude oil prices, movement of rupee against USD, energy market dynamics, interest-rate outlook and other international macroeconomic cues, will also remain key drivers of market sentiment in the near term. Besides, Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be closely monitored.

From the technical standpoint, Nifty may find support at 23860, 23750, 23631, 23502 while levels of 23970, 24080, 24210, 24352 may act as resistance with pivot point at 23933.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	29-Sep-26	24048.00	24349.00	**-1.24%**	**150.30**	672578	614835	**9.39%**
BANKNIFTY	29-Sep-26	57775.00	57860.00	**-0.15%**	**405.35**	134378	133836	**0.40%**

(Source: NSE)

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	196.80	200.83	29-Sep-26	**29.90%**
LICHSGFIN	562.05	570.40	29-Sep-26	**21.69%**
UPL	582.15	588.90	29-Sep-26	**16.93%**
SHREECEM	23855.00	24125.00	29-Sep-26	**16.52%**
CANBK	125.50	126.89	29-Sep-26	**16.17%**
BHEL	431.10	435.70	29-Sep-26	**15.58%**
BPCL	315.70	319.05	29-Sep-26	**15.49%**
RELIANCE	1322.00	1335.60	29-Sep-26	**15.02%**
HINDPETRO	356.50	360.05	29-Sep-26	**14.54%**
DIVISLAB	9100.00	9188.00	29-Sep-26	**14.12%**

(Source: NSE)

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HAVELLS	1154.00	1144.30	29-Sep-26	**-12.27%**
SBILIFE	1775.00	1774.90	29-Sep-26	**-0.08%**

(Source: NSE)

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	68365235	60851325	**1.12**

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. IGL	**2. RELIANCE**	**3. HEROMOTOCO**	**4. EICHERMOT**	**5. MARUTI**
6. TIINDIA	**7. M&M**	**8. EXIDEIND**	**9. BHARATFORG**	**10. TVSMOTOR**
11. ASHOKLEY	**12. BOSCHLTD**	**13. SONACOMS**		

(Source: Moneycontrol)

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