SHRIRAM Insight

HAR HAATH MEIN DHAN KI REKHA

EQUITY WEEKLY REPORT

08th August 2026

Market Snapshot

KEY INDICES	07-Aug-26	31-JuL-26	%Ch
S&P CNX NIFTY	24570.65	24383.60	**0.77**
SENSEX	78499.17	78094.64	**0.52**
NIFTY MIDCAP 100	63463.55	62915.30	**0.87**
NIFTY SMLCAP 100	19867.80	19339.65	**2.73**

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	07-Aug-26	31-JuL-26	%Ch
NIFTY BANK	57746.45	57264.85	**0.84**
NIFTY AUTO	29647.90	28744.15	**3.14**
NIFTY FMCG	49435.20	49121.20	**0.64**
NIFTY IT	31547.70	30708.90	**2.73**
NIFTY METAL	13189.85	12719.00	**3.70**
NIFTY PHARMA	26541.80	26534.80	**0.03**
NIFTY REALTY	885.95	901.45	**-1.72**
BSE CG	79282.73	77012.22	**2.95**
BSE CD	64972.91	65145.56	**-0.27**
BSE Oil & GAS	26349.18	26484.24	**-0.51**
BSE POWER	7660.66	7668.81	**-0.11**

(Source: Investing.com)

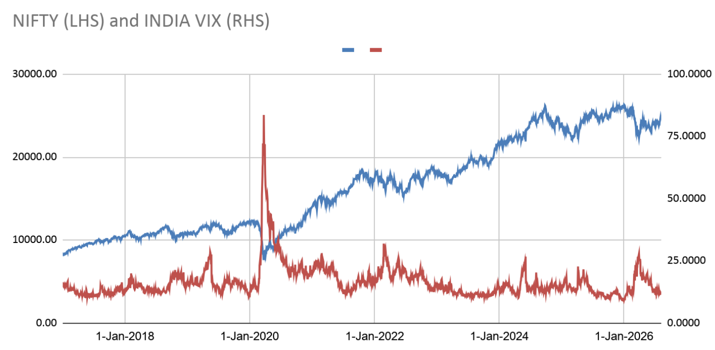
FII & DII Activities (Rs Crore)

31/07/2026 to 07/08/2026

Activities	FIIs	DIIs
Buy	109653.81	108209.85
Sell	91944.89	98182.11
Net	**17708.92**	**10027.74**

(Source: Capitaline)

Nifty Vs. INDIA VIX



(Source: NSE)

Indices end lower as CAS rollout weighs; Nifty ends below 24,600 level

Indian equity markets ended the week with moderate losses as investor sentiment remained subdued amid the rollout of the Securities and Exchange Board of India (SEBI)'s new Closing Auction Session (CAS) mechanism, which triggered sharp price movements in several heavyweight stocks during the closing minutes of trade. The heightened volatility also affected the settlement of weekly derivatives contracts on both the NSE and BSE, adding to investor caution.

Investor caution was further reinforced after the Reserve Bank of India (RBI) kept the benchmark repo rate unchanged at 5.25% while retaining its neutral monetary policy stance.

Although the RBI expressed confidence in the domestic economy by raising its FY27 GDP growth forecast to 6.7% and lowering its inflation projection to 5.0%, the positive macroeconomic outlook failed to lift market sentiment. Instead, investors remained focused on near-term risks, including heightened market volatility, geopolitical

Sensex Gainers - Weekly

SCRIPS	07-Aug-26	31-JuL-26	%Ch
SBIN	1096.05	1026.80	**6.74**
INFY	1173.10	1130.00	**3.81**
TCS	2453.70	2365.60	**3.72**
M&M	3501.40	3396.35	**3.09**
LT	4045.00	3938.60	**2.70**

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	07-Aug-26	31-JuL-26	%Ch
BAJFINANCE	1082.00	1141.70	**-5.23**
POWERGRID	271.75	284.30	**-4.41**
HDFCBANK	732.00	747.90	**-2.13**
SUNPHARMA	1949.00	1989.35	**-2.03**
BAJAJFINSV	2001.90	2029.40	**-1.36**

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	07-Aug-26	31-JuL-26	%Ch
HINDALCO	1059.60	974.45	**8.74**
GRASIM	3323.00	3100.80	**7.17**
SBIN	1097.20	1027.40	**6.79**
HEROMOTOCO	5725.00	5386.00	**6.29**
INFY	1175.10	1130.10	**3.98**

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	07-Aug-26	31-JuL-26	%Ch
BAJFINANCE	1078.00	1141.20	**-5.54**
UPL	573.00	604.30	**-5.18**
POWERGRID	271.60	284.25	**-4.45**
GAIL	173.63	181.44	**-4.30**
SUNPHARMA	1945.00	1990.50	**-2.29**

(Source: Capitaline)

developments, and uncertainty surrounding the impact of the new CAS framework on trading dynamics.

In the week ended on Friday, 7 August 2026, the S&P BSE Sensex shed 139.86 points or 0.18% to settle at 78,499.17. The Nifty 50 index declined 203.65 points or 0.82% to settle at 24,570.65. The BSE 150 Mid-Cap index gained 0.96% to close at 17,240.08. The BSE 250 Small-Cap jumped 1.23% to end at 7,240.15.

Effective 3 August 2026, the Closing Auction Session (CAS) has been introduced for stocks in the F&O segment, revising market closing timings while keeping the opening time unchanged. Continuous trading in F&O stocks will now end at 3:15 pm, followed by the closing auction session, while non-F&O stocks will continue to trade until 3:30 pm. Trading in index and stock futures and options will conclude at 3:40 pm. The new mechanism is aimed at enhancing price discovery for the official closing price, reducing end-of-day volatility, and facilitating transparent execution of large institutional orders.

India's services sector continued to expand in July, although growth slowed sharply, according to the latest HSBC India Services PMI survey. The Business Activity Index fell to 53.3 from 57.4 in June, marking the weakest expansion in 53 months while remaining above the 50-point threshold that separates growth from contraction.

At the broader level, the HSBC India Composite PMI Output Index declined to 54.3 from 57.1, signalling the slowest pace of private-sector expansion since March 2022, even as employment continued to rise and business confidence remained positive despite easing to a seven-month low.

Global Markets:

The S&P Global UK Services PMI rose to 52.1 in July from 48.8 in June, returning to expansion territory for the first time in three months, although it remained below its long-run average of 54.2. The Composite PMI also improved to 52.2.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	07-Aug-26	31-JuL-26	%Ch
DEVYANI	134.73	114.18	**18.00**
HINDZINC	603.00	539.20	**11.83**
JUBLFOOD	486.50	438.25	**11.01**
NAVINFLUOR	8271.00	7567.50	**9.30**
DEEPAKNTR	1796.50	1662.20	**8.08**

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	07-Aug-26	31-JuL-26	%Ch
ZEEL	94.19	114.55	**-17.77**
TORNTPOWER	1350.80	1413.30	**-4.42**
SUNTV	486.65	508.65	**-4.33**
CROMPTON	249.95	260.20	**-3.94**
CONCOR	505.20	525.50	**-3.86**

(Source: Capitaline)

World Markets

KEY INDICES	07-Aug-26	31-JuL-26	%Ch
DJIA	54036.93	52485.03	**2.96**
NASDAQ	26690.62	25373.85	**5.19**
BOVESPA	172513.42	177999.00	**-3.08**
FTSE 100	10901.09	10868.05	**0.30**
CAC 40	8714.93	8509.64	**2.41**
DAX	26319.45	25629.24	**2.69**
MOEX RUSSIA	2281.31	2226.36	**2.47**
NIKKEI 225	65606.71	64362.02	**1.93**
HANG SENG	25668.03	25884.43	**-0.84**
STRAITS TIMES	5698.43	5628.50	**1.24**
SHANGHAI COMPOSITE	3940.04	3832.26	**2.81**
JAKARTA	6409.65	6236.13	**2.78**

(Source: Capitaline, Investing.com)

China's exports grew more than expected in July, although the pace moderated from June's robust expansion, supported by strong global demand for high-tech components.

Official customs data released on Friday showed that exports rose 23% year-on-year in U.S. dollar terms in July, easing from 27% growth in June—the fastest pace since October 2021. Imports increased 27.5% from a year earlier, compared with a 36% jump in June, which had marked the strongest growth in five years.

China's trade surplus stood at $112.5 billion in July, narrowing from $125.6 billion recorded in June.

(Source: Capitaline)

Outlook and Technical View

Going forward, market participants are expected to closely monitor the impact of the NSE's Closing Auction Session (CAS) on market liquidity and price discovery, the progress of the on-going corporate earnings season, and management commentary on sector-specific demand trends. Global developments, including the evolving U.S.-Iran conflict, movements in crude oil prices, movement of rupee against USD, energy market dynamics, 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 24520, 24467, 24412, 24252 while levels of 24627, 24683, 24735, 24898 may act as resistance with pivot point at 24575.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	25-Aug-26	24651.20	24430.00	**0.91%**	**80.55**	481944	504837	**-4.53%**
BANKNIFTY	25-Aug-26	58013.00	57412.00	**1.05%**	**266.55**	138566	141014	**-1.74%**

(Source: NSE)

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
MUTHOOTFIN	2890.00	2915.10	25-Aug-26	**17.61%**
BAJFINANCE	1078.00	1086.60	25-Aug-26	**16.18%**
NTPC	342.50	345.20	25-Aug-26	**15.99%**
AXISBANK	1238.00	1247.70	25-Aug-26	**15.89%**
TECHM	1635.00	1647.80	25-Aug-26	**15.87%**
INDIGO	5333.00	5374.50	25-Aug-26	**15.78%**
ICICIPRULI	501.05	504.90	25-Aug-26	**15.58%**
HDFCBANK	731.00	736.45	25-Aug-26	**15.12%**
NAUKRI	1225.30	1234.40	25-Aug-26	**15.06%**
TATASTEEL	187.55	188.94	25-Aug-26	**15.03%**

(Source: NSE)

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
LICHSGFIN	504.25	495.00	25-Aug-26	**-37.20%**
IOC	143.38	141.55	25-Aug-26	**-25.88%**
JUBLFOOD	486.50	480.70	25-Aug-26	**-24.17%**
BANDHANBNK	176.02	174.54	25-Aug-26	**-17.05%**
BHEL	405.20	402.15	25-Aug-26	**-15.26%**
HAVELLS	1288.00	1278.80	25-Aug-26	**-14.48%**
GODREJCP	1050.00	1043.40	25-Aug-26	**-12.75%**
PAGEIND	39900.00	39665.00	25-Aug-26	**-11.94%**
PETRONET	280.60	278.95	25-Aug-26	**-11.92%**
DRREDDY	1172.00	1165.40	25-Aug-26	**-11.42%**

(Source: NSE)

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	51415585	47096725	**1.09**

(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. HINDZINC	**2. WELCORP**	**3. HINDCOPPER**	**4. NATIONALUM**	**5. HINDALCO**
6. APLAPOLLO	**7. VEDL**	**8. SAIL**	**9. OBEROIRLTY**	**10. DLF**
11. ABREL	**12. SOBHA**			

(Source: Moneycontrol)

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