SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY WEEKLY REPORT

22nd August 2026

Market Snapshot

KEY INDICES	21-Aug-26	14-Aug-26	%Ch
S&P CNX NIFTY	24252.00	24366.00	-0.47
SENSEX	77540.83	78009.25	-0.60
NIFTY MIDCAP 100	63735.75	63782.15	-0.07
NIFTY SMLCAP 100	19977.75	19738.55	1.21

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	21-Aug-26	14-Aug-26	%Ch
NIFTY BANK	57761.95	57491.10	0.47
NIFTY AUTO	29124.60	29207.90	-0.29
NIFTY FMCG	47510.95	48615.05	-2.27
NIFTY IT	30532.25	31357.75	-2.63
NIFTY METAL	13172.60	12941.70	1.78
NIFTY PHARMA	26359.75	26445.55	-0.32
NIFTY REALTY	911.60	895.65	1.78
BSE CG	79219.75	80120.02	-1.12
BSE CD	65276.34	65702.75	-0.65
BSE Oil & GAS	26090.60	26273.21	-0.70
BSE POWER	7541.66	7643.35	-1.33

(Source: Investing.com)

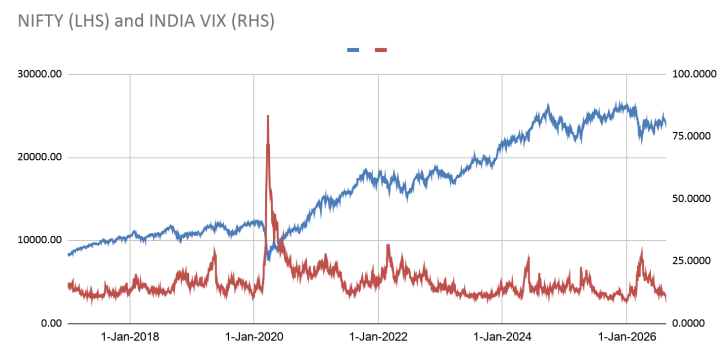
FII & DII Activities (Rs Crore)

14/08/2026 to 21/08/2026

Activities	FIIs	DIIs
Buy	85661.67	95995.65
Sell	78387.78	78322.91
Net	**7273.89**	**17672.74**

(Source: Capitaline)

Nifty Vs. INDIA VIX



(Source: NSE)

Benchmarks decline for 3rd straight week amid geopolitical tensions

Indian equity benchmarks ended the week with significant losses, weighed down by elevated crude oil prices and escalating tensions between the US and Iran. Continued foreign institutional investor (FII) selling, higher US bond yields and a weaker rupee further dampened investor sentiment.

The broader market outperformed the frontline indices during the week, with mid- and small-cap stocks ending marginally higher. With the earnings season largely over, investors are likely to shift their focus towards upcoming economic data, the interest-rate outlook, global cues and stock- and sector-specific developments.

Persistent concerns over the impact of elevated crude oil prices on inflation, corporate margins, dollar inflows and India's external balances remained a key overhang for domestic equities. At the same time, elevated US Treasury yields and continued foreign fund outflows kept risk appetite subdued.

Sensex Gainers - Weekly

SCRIPS	21-Aug-26	14-Aug-26	%Ch
KOTAKBANK	402.80	393.00	2.49
AXISBANK	1246.30	1217.40	2.37
POWERGRID	272.30	266.50	2.18
LT	4088.05	4062.70	0.62
BAJFINANCE	1093.20	1087.70	0.51

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	21-Aug-26	14-Aug-26	%Ch
TMPV	317.70	334.20	-4.94
INFY	1120.00	1169.05	-4.20
HCLTECH	1304.00	1360.00	-4.12
HINDUNILVR	2017.00	2089.25	-3.46
TECHM	1583.05	1634.70	-3.16

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	21-Aug-26	14-Aug-26	%Ch
HDFCLIFE	554.80	535.85	3.54
KOTAKBANK	402.80	391.15	2.98
POWERGRID	272.40	266.05	2.39
AXISBANK	1245.80	1217.40	2.33
JSWSTEEL	1293.70	1270.00	1.87

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	21-Aug-26	14-Aug-26	%Ch
TMPV	317.90	334.50	-4.96
HCLTECH	1302.50	1360.00	-4.23
INFY	1121.00	1169.20	-4.12
BRITANNIA	5365.00	5558.00	-3.47
ITC	269.40	278.20	-3.16

(Source: Capitaline)

In the week ended on Friday, 21 August 2026, the barometer index, the S&P BSE Sensex declined 468.42 points or 0.60% to 77,540.83. The Nifty 50 index dropped 114 points or 0.47% to 24,252. The BSE 150 Mid-Cap index gained 0.04% to close at 17,282.07. The BSE 250 Small-Cap rose 0.36% to end at 7,242.51.

The Index of Core Industries (ICI) recorded a year-on-year growth of 5.4% in July 2026, according to provisional estimates released by the Ministry of Commerce and Industry. Growth was lower than the 6% recorded in June. However, cumulative growth during April-July 2026 stood at 4.3%, compared with 1.5% during the corresponding period a year earlier. Iron ore registered the highest growth among the eight core sectors, rising 29.5 per cent year-on-year in July.

The Cabinet Committee on Economic Affairs approved five infrastructure projects worth a combined Rs 13,041 crore, including four railway multitracking projects worth Rs 9,450 crore across West Bengal, Odisha, Tamil Nadu and Andhra Pradesh, and an Rs 3,590.73 crore upgrade of the Muzaffarpur-Sitamarhi-Sonbarsa section of NH-22 in Bihar. The railway projects will add about 410 km to the network, ease congestion, improve connectivity to around 6,448 villages and support additional freight traffic of 76 million tonnes per annum, while the Bihar highway project will upgrade 82.578 km to four-lane standards and strengthen connectivity with the India-Nepal border.

Global Market:

European Markets

UK annual consumer price inflation accelerated to 2.9% in July from 2.6% in June, driven by the sharpest increase in gas prices since October 2022. The rise in inflation was led by a 3.4% increase in services prices, while goods prices rose 1.7%. Housing and household services, particularly gas and electricity, made the largest upward contribution to inflation, while transport costs provided the biggest downward offset, the UK Office for National Statistics said.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	21-Aug-26	14-Aug-26	%Ch
IPCALAB	1911.20	1734.20	10.21
HINDZINC	594.90	561.90	5.87
TUBEINVEST	2885.80	2733.50	5.57
ZEEL	107.58	102.28	5.18
DIXON	14850.00	14130.00	5.10

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	21-Aug-26	14-Aug-26	%Ch
BATAINDIA	701.05	755.70	-7.23
GUJENERGY	263.35	282.95	-6.93
TATACHEM	626.75	670.65	-6.55
VOLTAS	1235.00	1320.50	-6.47
CUMMINSIND	5107.50	5400.00	-5.42

(Source: Capitaline)

World Markets

KEY INDICES	21-Aug-26	14-Aug-26	%Ch
DJIA	53277.01	53732.41	-0.85
NASDAQ	26180.46	26729.16	-2.05
BOVESPA	171031.73	166934.20	2.45
FTSE 100	10816.56	10750.11	0.62
CAC 40	8484.43	8636.80	-1.76
DAX	26136.56	26440.31	-1.15
MOEX RUSSIA	2134.97	2136.35	-0.06
NIKKEI 225	66016.36	68713.80	-3.93
HANG SENG	26009.46	25116.85	3.55
STRAITS TIMES	5688.96	5743.59	-0.95
SHANGHAI COMPOSITE	3905.20	3927.18	-0.56
JAKARTA	6525.69	6401.89	1.93

(Source: Capitaline, Investing.com)

Asian Markets:

China's economy lost momentum in July, retail sales grew 0.6% year-on-year, slowing from 1% growth in June. Urban fixed-asset investment fell 6.7%, compared with a 5.7% decline in the first half, while industrial output growth slowed to 4.5% from 5.3% in June. The urban unemployment rate rose to 5.2% from 5% in June.

US Markets:

US inflation data last week showed consumer prices rose 0.1% in July, while producer prices were unchanged. Markets now see about a 30% chance of a September rate hike, down from around 50% a week earlier.

Minutes of the Federal Reserve's July meeting showed that many policymakers were open to further rate hikes if inflation remained elevated; the Fed had kept its policy rate unchanged at 3.50%-3.75%.

(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 24212, 24135, 24011, 23852 while levels of 24289, 24325, 24413, 24498 may act as resistance with pivot point at 24248.

(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	24288.00	24450.00	**-0.66%**	**36.00**	370302	509259	**-27.29%**
BANKNIFTY	25-Aug-26	57705.00	57670.00	**0.06%**	**-56.95**	93398	139694	**-33.14%**

(Source: NSE)

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	173.46	174.46	25-Aug-26	**52.61%**
MUTHOOTFIN	3022.00	3039.20	25-Aug-26	**51.94%**
HCLTECH	1302.50	1309.30	25-Aug-26	**47.64%**
HDFCBANK	726.95	730.45	25-Aug-26	**43.93%**
MARUTI	13565.00	13628.00	25-Aug-26	**42.38%**
ICICIPRULI	515.00	517.35	25-Aug-26	**41.64%**
HINDPETRO	363.25	364.80	25-Aug-26	**38.94%**
SRF	2571.90	2582.40	25-Aug-26	**37.25%**
ONGC	236.40	237.30	25-Aug-26	**34.74%**
TATAPOWER	374.30	375.70	25-Aug-26	**34.13%**

(Source: NSE)

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
BANKBARODA	247.00	244.78	25-Aug-26	**-82.01%**
DIVISLAB	8597.00	8523.50	25-Aug-26	**-78.01%**
CANBK	129.96	128.91	25-Aug-26	**-73.72%**
CIPLA	1432.20	1421.10	25-Aug-26	**-70.72%**
HEROMOTOCO	5735.00	5692.00	25-Aug-26	**-68.42%**
FEDERALBNK	361.00	358.55	25-Aug-26	**-61.93%**
TVSMOTOR	4390.00	4360.40	25-Aug-26	**-61.53%**
AUROPHARMA	1621.30	1611.00	25-Aug-26	**-57.97%**
GRASIM	3308.00	3287.30	25-Aug-26	**-57.10%**
SBIN	1048.70	1042.50	25-Aug-26	**-53.95%**

(Source: NSE)

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	189715175	176062900	**1.08**

(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. WELCORP	**2. HINDCOPPER**	**3. HINDZINC**	**4. NATIONALUM**	**5. VEDL**
6. JINDALSTEL	**7. BRIGADE**	**8. LTM**	**9. MPHASIS**	**10. HCLTECH**
11. INFY	**12. TECHM**			

(Source: Moneycontrol)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |