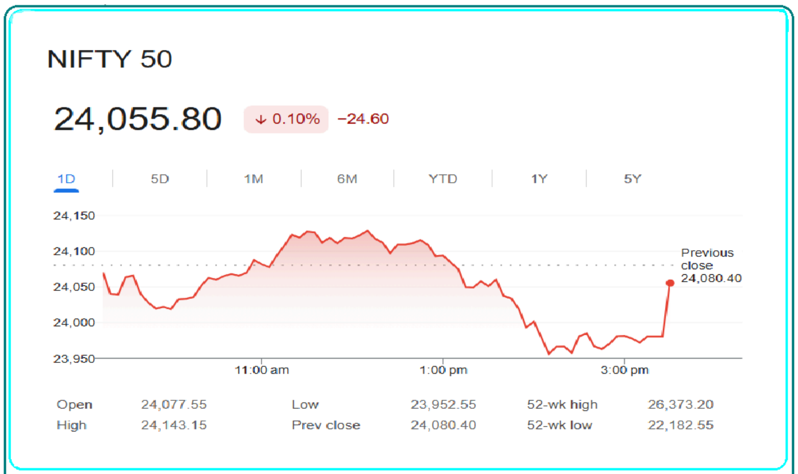
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

01st September 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24055.80	24080.40	**-0.10%**
S&P BSE SENSEX	76944.28	76957.27	**-0.02%**
NIFTY MID100	63334.50	64224.75	**-1.39%**
NIFTY SML100	19886.25	19931.65	**-0.23%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity indices ended with minor losses, extending their decline for the second consecutive session, as escalating Middle East tensions pushed oil prices and bond yields higher, while heavyweight bank stocks reversed gains recorded in Monday's closing auction. Nifty closed below the 24,100 level.
- The S&P BSE Sensex declined 12.99 points or 0.02% to 76,944.28. The Nifty 50 index lost 24.60 points or 0.01% to 24,055.80.
- The BSE 150 MidCap Index declined 0.74% and the BSE 250 SmallCap Index added 0.04%.
- Among the sectoral indices, the Nifty IT index (up 0.98%), the Nifty FMCG index (up 0.94%) and the Nifty Media index (up 0.26%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Healthcare index (down 1.60%), the Nifty Pharma index (down 1.45%) and the Nifty Realty index (down 1.42%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **September** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **8353** contracts at the end of the day.
- **Long** position build up for the **September** series has been witnessed in **RELIANCE**, **INFY**.
- **Short** position build up for the **September** series has been witnessed in **SBIN**, **HDFCBANK**, **BAJFINANCE**.
- **Unwinding** position for the **September** series has been witnessed in **LT**, **BHARTIARTL**, **ICICIBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57409.60	58024.95	-1.06%
NIFTY AUTO	28491.05	28841.50	-1.22%
NIFTY FMCG	46457.15	46025.55	0.94%
NIFTY IT	31496.70	31191.45	0.98%
NIFTY METAL	13189.85	13193.90	-0.03%
NIFTY PHARMA	26792.65	27186.45	-1.45%
NIFTY REALTY	891.30	904.15	-1.42%
BSE CG	78500.41	79249.51	-0.95%
BSE CD	63916.90	64726.79	-1.25%
BSE Oil & GAS	26157.16	25930.55	0.87%
BSE POWER	7408.24	7414.14	-0.08%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	66215.34	66311.93	-0.15%
HANG SENG	25329.73	25566.99	-0.93%
STRAITS TIMES	5710.37	5755.36	-0.78%
SHANGHAI	3979.89	3986.30	-0.16%
KOSPI	6835.80	6820.02	0.23%
JAKARTA	6599.94	6525.48	1.14%
TAIWAN	46948.72	46128.47	1.78%
KLSE COMPOSITE	1700.54	1725.88	-1.47%
All ORDINARIES	9260.90	9271.40	-0.11%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	124032.64	181717.85
NSE F&O	148721.64	136853.22

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1143.38
NET SELL	-

(Source: NSE)

Corporate News

- **Maruti Suzuki India** reported a 21.3% year-on-year rise in total sales to 2,19,220 units in August 2026, compared with 1,80,683 units in the same month last year, as domestic passenger vehicle sales continued to drive growth. The automaker's domestic sales, including light commercial vehicles, rose 34.3% to 1,80,078 units from 1,34,050 units a year earlier. Exports, however, declined 7.4% to 33,844 units from 36,538 units.

- **Tata Motors Ltd** reported a 49% growth in total commercial vehicle sales in August at 44,411 units as compared to 29,863 units in the same month last year. Domestic commercial vehicle sales were up 33% at 36,619 units last month as compared to 27,481 units in August last year. International business volumes were at 7,792 units in August as against 2,382 units in the year-ago month, registering a 227% growth year-on-year.

- **Bajaj Auto** reported a 28% rise in total sales to 5,35,764 units in August compared to 4,17,616 units in the same month last year. Total domestic sales increased 10% to 2,55,708 units last month, as against 2,32,398 units in the year-ago period. Exports of two-wheelers stood 53% higher at 2,41,850 units last month as compared to 1,57,778 units in the same month a year ago.

- **Mahindra & Mahindra Ltd** reported a 42% jump in total vehicle sales to 1,07,648 units in August compared with the same month last year. The overall auto sales for August 2026 stood at 1,07,648 vehicles, a growth of 42%, including exports. It said domestic sales of commercial vehicles stood at 27,415 units, registering a year-on-year growth of 22%.

- **Escorts Kubota** said that its Agri Machinery Business in August 2026 sold 10,072 tractors as against 8,456 tractors sold in August 2025, thereby registering a growth of 19.1% on year-on-year (YoY) basis. While domestic tractor sales jumped by 20.5% to 9,523 tractors, exports declined by 0.9% to 549 units in August 2026 over August 2025.

- **Hyundai Motor India Ltd** reported an 8.8% year-on-year rise in total sales at 65,796 units in August. The total monthly sales comprised domestic sales of 54,396 units, up 23.6% year-on-year, and exports of 11,400 units. The shipments fell 19.6% to 38,708 units, compared with

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ITC	266.60	255.50	**4.34%**
BHARTIARTL	1877.20	1811.90	**3.60%**
ADANIPORTS	1647.50	1593.10	**3.41%**
HCLTECH	1351.40	1312.20	**2.99%**
RELIANCE	1309.00	1277.00	**2.51%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	1059.10	1109.90	**-4.58%**
MARUTI	12950.00	13547.00	**-4.41%**
NESTLEIND	1438.20	1496.50	**-3.90%**
MAXHEALTH	1003.00	1042.10	**-3.75%**
INDIGO	5052.00	5234.00	**-3.48%**

(Source: Moneycontrol)

- **Hero MotoCorp** has expanded its presence in Central America with the launch of the company's flagship store at Calle El Progreso in collaboration with San Salvador-based automotive distributor VELOSA (Oriental Motors, S.A).

- **HFCL** has bagged an export order of USD 244 million, about Rs 2,329 crore, for supplying high-quality optical fibre cable to a global multinational corporation.

- **Canara Bank** has recovered all its dues totalling Rs 510 crore from debt laden Rajesh Exports following an order by a debt recovery tribunal (DRT), which asked the company to deposit the money to prevent its properties being sold.

48,140 units in the same period last year.

- **Tata Elxsi** and Sarla Aviation will collaborate on India's first indigenous electric aircraft. The Shunya eVTOL aircraft is designed to carry six passengers and one pilot. This partnership will accelerate the development of flight-critical systems for the new aircraft. Sarla Aviation targets the Shunya's first flight within the next eighteen to twenty-four months. The collaboration aims to advance urban air mobility and related applications.

- **Cipla** said that it has entered into an exclusive license and supply agreement with Chia Tai Tianqing Pharmaceutical Group Co. for Rolditamig Deuderuxtecan, a potential best-in-class HER2 bispecific antibody-drug conjugate (ADC).

- **Sun Pharmaceutical** has agreed to extend Most Favoured Nation (MFN) pricing to US state Medicaid programmes and future innovative drug launches under a White House initiative aimed at improving access to affordable medicines.

- **Mankind Pharma** has completed the sale of its entire stake in Broadway Hospitality Services. The transaction involved transferring 100% ownership to AKRK Projects LLP and its partners. This divestment officially concluded on August 31, 2026, as per the company's filing. Broadway Hospitality Services is no longer a wholly-owned subsidiary of Mankind Pharma. The total consideration for this divestment was reported as Rs 49 crore.

- Lannett Company LLC, a wholly owned subsidiary of **Aurobindo Pharma** US, has launched a generic equivalent of Advair Diskus (fluticasone propionate and salmeterol inhalation powder) in the US market in 100/50 mcg and 250/50 mcg strengths.

(Source: Business Standard, Economic Times, Smart investor)

Global News

- China's RatingDog Manufacturing PMI increased to 51.5 in August 2026 from July's four-month low of 50.9.
- U.S. actual reading for the Chicago PMI came in at 47.1, indicating contraction.
- U.K. S&P Global Manufacturing PMI eased to 51.7 in August of 2026 from 51.9 in the previous month.
- Eurozone annual inflation accelerated to 3.3% in August 2026 from 2.9% in July. The core inflation rate eased to 2.4% in August of 2026 from 2.5% in the previous month.
- Eurozone's seasonally adjusted unemployment rate held at 6.4% in July, matching June's revised reading.
- Eurozone S&P Global Manufacturing PMI rose to 52.7 in August 2026 from 51.9 in July.
- Germany's annual inflation rate edged up to 2.9% in August 2026, its highest level since April. The monthly inflation rate also rose to a four-month high of 2.9%
- Germany's retail sales fell 3.4% month-on-month in July 2026, following an upwardly revised flat reading in the previous month. On an annual basis, retail sales declined 2.5%, reversing an upwardly revised 0.6% increase in June.
- Germany S&P Global Manufacturing PMI was revised slightly higher to 54.3 in August 2026 from a preliminary of 54.1, compared to 52.2 in July.
- France S&P Global Manufacturing PMI rose to 51.1 in August 2026 from 51.5 in the preliminary estimate and 49.8 in July.
- Australia's current account deficit widened to AUD 27.2 billion in the second quarter of 2026 from a downwardly revised AUD 25.4 billion in the previous quarter.
- Japan S&P Global Japan Manufacturing PMI was revised lower to 54.9 in August 2026 from the preliminary estimate of 55.1, after a final reading of 54.5 in the previous month.

(Source: Market Watch, RTT News, Reuters, Bloomberg)

Economic News

- Crude Oil traded at US$ 87.83/bbl (IST 17:00).
- INR strengthened to Rs. 94.96 from Rs. 95.18 against each US$ resulting in daily change of 0.23%.
- India's HSBC Manufacturing PMI eased to 52.8 in August 2026 from 53.5 in July.
- India's gross GST revenue rose 14.8% year-on-year to Rs 1.99 lakh crore in August 2026, up from Rs 1.74 lakh crore a year earlier. However, collections fell from Rs 2.11 lakh crore in July 2026.
- Over 7.8 crore Income Tax Returns were filed for AY 2026-27 by August 31. This marked the close of the revised statutory

deadline for non-audit taxpayers. The Income Tax Department thanked taxpayers and professionals for their timely compliance. Non-audit business and professional taxpayers had an extended filing period. Belated returns can be filed until December 31, 2026.

- India's services sector saw a remarkable expansion in July, with exports climbing 13.4% to USD 38.25 billion alongside a 19.1% rise in imports to USD 20.61 billion. This development yielded a services trade surplus nearing USD 17.65 billion. For the period from April to July, total services exports stood at USD 145 billion, and imports were at USD 75.14 billion.
- India's UPI processed transactions near record highs in August, reaching Rs. 29.8 lakh crore. The platform handled a fresh record of 24.51 billion transactions, a significant jump from July. This impressive performance was bolstered by festive activity and expanding consumer adoption across the nation. Industry experts highlight the importance of resilient digital infrastructure for continued growth.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 02/09/2026

Persistent Systems Limited	Fund Raising
Technocraft Ventures Limited	Financial Results

(Source: NSE)

Corporate Actions as on 02/09/2026

Gujarat Pipavav Port Limited	Dividend - Rs 5 Per Share
NTPC Limited	Dividend - Rs 3.50 Per Share
Chemfab Alkalis Limited	Dividend - Rs 1.25 Per Share
Dr Agarwals Eye Hospital Limited	Dividend - Rs 4 Per Share
GAIL (India) Limited	Dividend - Re 0.50 Per Share
Tribhovandas Bhimji Zaveri Limited	Dividend - Rs 2.50 Per Share
Triveni Turbine Limited	Dividend - Rs 2 Per Share

(Source: NSE)

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