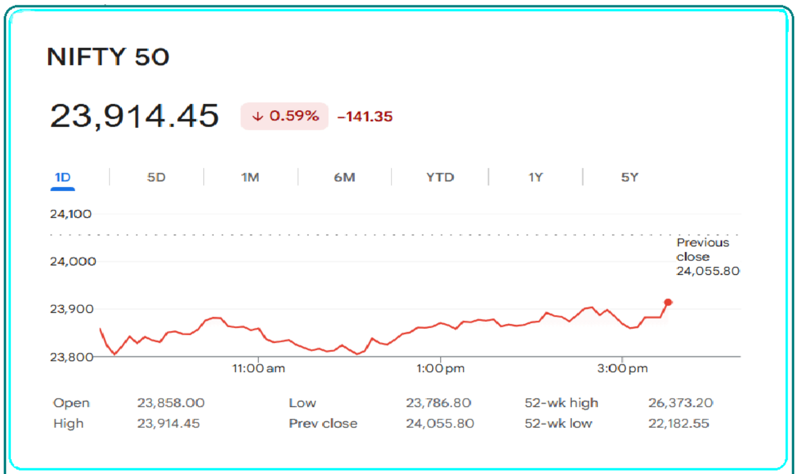
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

02nd September 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23914.45	24055.80	**-0.59%**
S&P BSE SENSEX	76570.35	76944.28	**-0.49%**
NIFTY MID100	63001.60	63334.50	**-0.53%**
NIFTY SML100	19812.25	19886.25	**-0.37%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity indices ended with minor losses, extending their decline for the third consecutive trading session, as rising crude oil prices and higher bond yields heightened concerns over a potential resurgence in inflation and raised fears of tighter monetary policy by global central banks. Escalating US-Iran tensions further dampened investor sentiment and kept risk appetite subdued. The Nifty ended below the 23,950 mark.
- The S&P BSE Sensex declined 373.90 points or 0.49% to 76,570.35. The Nifty 50 index lost 141.35 points or 0.59% to 23,914.45. In the three consecutive trading session, the Sensex declined 0.90%, while the Nifty fell 1.08%.
- The BSE 150 MidCap Index dropped 0.55% and the BSE 250 SmallCap Index fell 0.51%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 0.33%), the Nifty Realty index (up 0.21%) and the Nifty PSU Bank index (up 0.07%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Auto index (down 1.79%), the Nifty Media index (down 1.75%) and the Nifty IT index (down 1.25%) 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 **10480** contracts at the end of the day.
- **Long** position build up for the **September** series has been witnessed in **RELIANCE**, **BAJFINANCE**.
- **Short** position build up for the **September** series has been witnessed in **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- **Unwinding** position for the **September** series has been witnessed in **LT**, **ONGC**, **BHARTIARTL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57172.00	57409.60	-0.41%
NIFTY AUTO	27981.95	28491.05	-1.79%
NIFTY FMCG	46240.55	46457.15	-0.47%
NIFTY IT	31102.90	31496.70	-1.25%
NIFTY METAL	13157.35	13189.85	-0.25%
NIFTY PHARMA	26780.70	26792.65	-0.04%
NIFTY REALTY	893.15	891.30	0.21%
BSE CG	77649.94	78500.41	-1.08%
BSE CD	63606.29	63916.90	-0.49%
BSE Oil & GAS	26165.36	26157.16	0.03%
BSE POWER	7446.87	7408.24	0.52%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	64325.64	66215.34	-2.85%
HANG SENG	25311.21	25329.73	-0.07%
STRAITS TIMES	5744.11	5710.37	0.59%
SHANGHAI	3941.39	3979.89	-0.97%
KOSPI	6562.72	6835.80	-3.99%
JAKARTA	6595.78	6599.94	-0.06%
TAIWAN	46164.72	46948.72	-1.67%
KLSE COMPOSITE	1708.74	1700.54	0.48%
All ORDINARIES	9160.30	9260.90	-1.09%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	115184.52	124032.64
NSE F&O	109317.10	148721.64

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	6688.37
NET SELL	-

(Source: NSE)

Corporate News

- **Tata Motors** has secured all necessary regulatory approvals for its acquisition. The company's subsidiary obtained prior authorisations under the sectoral regulatory framework. Final clearance came from the European Central Bank for financial services businesses. This key hurdle has now been cleared for the tender offer. The proposed acquisition of Iveco Group is valued at GBP 3.8 billion.

- **Coal India** is investing nearly fifty thousand crore rupees in coal gasification projects. The company is also actively seeking overseas critical mineral assets, particularly lithium. Coal India targets nine point five gigawatts of renewable capacity by the year twenty thirty. These initiatives aim to reduce import dependence and capture new growth engines. The state-run miner is establishing a robust coal gasification ecosystem in India.

- **Coal India**'s supplies increased by 5.5 percent to 60.60 million tonnes in August. Non-regulated sector supplies saw robust growth of 9.6 percent during the same period. Total supplies for the first five months reached 322.90 million tonnes, showing 6.70 percent growth. However, coal production declined by 5.72 percent to 47.52 million tonnes in August. The company aims for 815 million tonnes production and 850 million tonnes offtake this fiscal.

- **Sun Pharmaceutical Industries** will offer its drugs at prices matching other developed nations. This agreement aims to make healthcare affordable for low-income Americans. Analysts believe the financial impact on Sun Pharma will be minimal. The company's US revenue contribution is significant, reinforcing its growth strategy. This pact recognizes Sun Pharma's investment in the American market.

- Astro Offshore PTE, step down subsidiary of **Adani Ports & Special Economic Zone** has incorporated a wholly owned subsidiary (WOS), namely, Astro Offshore MESA Company on 31 August 2026.

- **Adani Ports and Special Economic Zone** said that the company had handled its highest ever monthly cargo volume of 50MMT in a single month during August 2026. The cargo volume is higher by 19% as compared with the

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	417.85	401.60	**4.05%**
ADANIPORTS	1672.70	1647.50	**1.53%**
ADANIENT	2891.80	2863.90	**0.97%**
BAJAJFINSV	1990.00	1972.00	**0.91%**
TMPV	312.75	310.00	**0.89%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	7711.50	7970.00	**-3.24%**
WIPRO	177.09	181.70	**-2.54%**
M&M	3190.00	3259.00	**-2.12%**
BAJAJ-AUTO	12130.00	12361.00	**-1.87%**
ASIANPAINT	2527.50	2575.50	**-1.86%**

(Source: Moneycontrol)

figure of 41.9 MMT recorded in August 2025.

- **EMS** received the Lowest Bidder (L-1) status from the Directorate of Local Bodies, Government of Rajasthan, for a sewerage project.
- **BEML** announced that it has secured an additional order worth Rs 180.60 crore from Integral Coach Factory for manufacturing & supply of Vande Bharat (Sleeper) trainsets.
- **Texmaco Rail & Engineering** announced that Tsiko Africa Logistics, together with Barberry Holdings, has issued a letter of award for a project worth $135 million.
- **NMDC** reported a 20.77% year-on-year (YoY) increase in iron ore production to 4.07 million tonnes (MT) in August 2026, compared with 3.37 MT in August 2025. Iron ore sales rose 5.60% YoY to 3.58 MT in August 2026 from 3.39 MT in August 2025.

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

Global News

- U.S. S&P Global Manufacturing PMI was at 53.9 for a third consecutive month in August of 2026, revised higher from the flash estimate of 53.2.
- U.S. ISM Manufacturing PMI fell to 54.6 in August 2026 from July's near four-year high of 55.6.
- Australia's economy grew 0.4% qoq in Q2 2026, up from a 0.3% expansion in Q1, which had marked the slowest growth in a year. Annually, GDP advanced 2.1%, slowing from 2.5% in Q1, the softest pace in three quarters.

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

Economic News

- Crude Oil traded at US$ 90.38/bbl (IST 17:00).
- INR weakened to Rs. 94.98 from Rs. 94.96 against each US$ resulting in daily change of 0.02%.
- India's current account deficit widened to $4.2 billion, or 0.5% of GDP, in Q1 of fiscal 2026-27, from $3.4 billion, or 0.4% of GDP, a year earlier.
- India's electric vehicle market witnessed an impressive 51% year-over-year growth in August. Despite this surge, a 12%

sequential decline was recorded, attributed to festival-related office holidays. Electric two-wheelers experienced a remarkable 69% annual increase, bolstered by prominent manufacturers such as Bajaj Auto and TVS Motor. Meanwhile, electric car registrations saw a 12% month-on-month decrease from July's record levels, yet industry leaders are optimistic about ongoing strong consumer interest.

- Indian refiners sharply increased edible oil imports in August to build stocks ahead of the festive season. Palm oil imports rose 7% to 780,000 tonnes, while soyoil imports jumped 21% to a record 601,000 tonnes.
- India's economic indicators showed resilience and growth in August. Goods and services tax collections rose 14.8% to Rs. 2 lakh crore. Bulk car sales surged 36%, and UPI transactions reached a new record. Power consumption increased 12.9%, signaling economic momentum. These figures reflect healthy consumption and improving compliance across the nation.
- India and Afghanistan have agreed on follow-up measures to strengthen bilateral trade and economic cooperation, including enhanced customs and data-sharing cooperation, improved trade connectivity and regulatory coordination in pharmaceuticals and agriculture.
- Indian banks have lowered interest rates on foreign-currency deposits significantly. This action follows the closure of the Reserve Bank of India's special swap window. Banks offered unusually high rates to attract overseas funds during the ten-week period. This special facility enabled lenders to provide substantially higher returns to depositors. The strong inflows prompted the RBI to advance the closure of this window.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 03/09/2026

Canara Bank	Fund Raising

(Source: NSE)

Corporate Actions as on 03/09/2026

Action Construction Equipment Limited	Dividend - Rs 2 Per Share
Carraro India Limited	Dividend - Rs 6.75 Per Share
Interarch Building Solutions Limited	Dividend - Rs 12.50 Per Share
Nirlon Limited	Dividend - Rs 15 Per Share
Vadilal Industries Limited	Dividend - Rs 43 Per Share

(Source: NSE)

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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 |