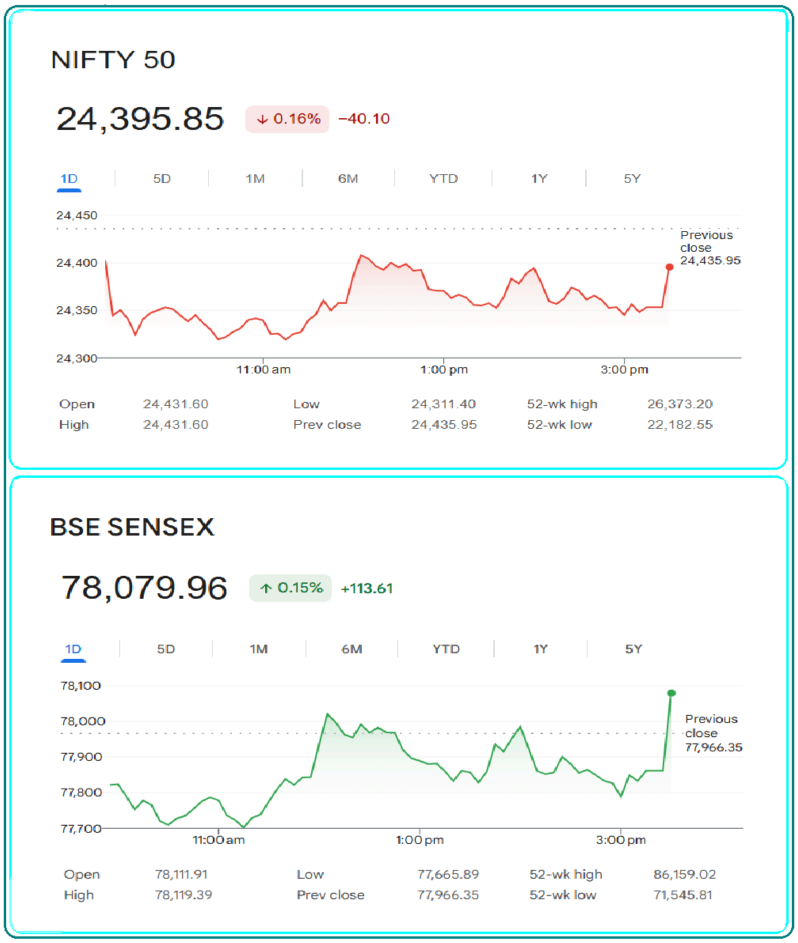
EQUITY DAILY REPORT

13th August 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24395.85	24435.95	**-0.16%**
S&P BSE SENSEX	78079.96	77966.35	**0.15%**
NIFTY MID100	64121.55	64024.40	**0.15%**
NIFTY SML100	19875.10	19821.65	**0.27%**

(Source: NSE, BSE)

Market Wrap Up

- The domestic equity benchmarks ended sideways amid the weekly expiry of BSE derivatives contracts. Market participants also assessed a slew of Q1 FY27 earnings announcements, with stock- and sector-specific movements dominating trading activity amid the ongoing results season. The Nifty closed below the 24,400 level.
- The S&P BSE Sensex advanced 113.61 points or 0.15% to 78,079.96. The Nifty 50 index lost 40.10 points or 0.16% to 24,395.85.
- The BSE 150 MidCap Index added 0.29% and the BSE 250 SmallCap Index rose 0.09%.
- Among the sectoral indices, the Nifty chemical index (up 1.25%), the Nifty realty index (up 0.97%) and the Nifty FMCG index (up 0.84%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Financial Metal index (down 1.05%), Nifty Bank index (down 0.43%) and the Nifty Financial Services Index (down 0.37%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **August** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **3599** contracts at the end of the day.
- **Long** position build up for the **August** series has been witnessed in **BHARTIARTL**, **BAJFINANCE**.
- **Short** position build up for the **August** series has been witnessed in **RELIANCE**, **BHEL**, **HDFCBANK**, **INFY**.
- **Unwinding** position for the **August** series has been witnessed in **SBIN**, **ICICIBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57635.25	57885.85	-0.43%
NIFTY AUTO	29392.15	29363.05	0.10%
NIFTY FMCG	48837.30	48429.35	0.84%
NIFTY IT	31453.90	31332.55	0.39%
NIFTY METAL	13033.75	13171.45	-1.05%
NIFTY PHARMA	26686.80	26762.50	-0.28%
NIFTY REALTY	898.40	889.80	0.97%
BSE CG	80033.42	79861.37	0.22%
BSE CD	65588.77	65437.79	0.23%
BSE Oil & GAS	26391.08	26401.93	-0.04%
BSE POWER	7659.38	7645.82	0.18%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	68308.59	67524.06	1.16%
HANG SENG	25396.51	25440.17	-0.17%
STRAITS TIMES	5720.05	5720.75	-0.01%
SHANGHAI	3926.96	3946.68	-0.50%
KOSPI	6813.34	6579.04	3.56%
JAKARTA	6301.77	6373.85	-1.13%
TAIWAN	46021.48	45518.07	1.11%
KLSE COMPOSITE	1734.71	1741.61	-0.40%
All ORDINARIES	9381.40	9404.70	-0.25%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	111635.71	130811.40
NSE F&O	90933.08	122749.83

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	510.69

(Source: NSE)

Corporate News

- **Tata Motors Commercial Vehicles Ltd** reported 83% rise in consolidated net profit at Rs 2,560 crore for the quarter ended June 30. Revenue rose 20% to Rs 20,576 crore in Q1FY27 as compared to Rs 17,192 crore in Q1FY26.

- **Hindustan Aeronautics Ltd** reported a net profit of Rs 1,580 crore for the April-June quarter. Profit rose 14.7% from Rs 1,377 crore in the corresponding quarter of the previous year. Revenue increased 14.4% year-on-year to Rs 5,515 crore from Rs 4,819 crore, also topping the poll estimate of Rs 5,268 crore.

- **Grasim Industries** reported a 51% year-on-year rise in consolidated net profit to Rs 2,145.9 crore for the quarter ended June 2026. Consolidated revenue from operations rose 21% year-on-year to Rs 48,716.2 crore in Q1 FY27, compared with Rs 40,118 crore in the corresponding quarter of the previous financial year.

- **Larsen & Toubro** has secured a mega order to build what it described as India's largest single-cluster AI infrastructure, deploying 10,000 NVIDIA B300 GPUs at its Chennai data centre campus for US-based AI cloud company Together AI. The order is classified to be in the range of Rs 10,000 crore to Rs 15,000 crore.

- **Bharti Airtel** has discontinued several popular prepaid recharge plans nationwide. This move effectively increases Airtel's tariffs by three to four%. The Rs 299 plan's discontinuation is expected to have the biggest impact. Following this revision, Rs 349 becomes the cheapest unlimited prepaid plan. This rationalisation aims to encourage subscribers towards higher-value recharge packs.

- **VA Tech Wabag** reported a 29.8% decline in consolidated net profit to Rs 90.1 crore in Q1 FY27, compared with Rs 128.3 crore in Q4 FY26. Revenue increased 20.8% YoY to Rs 886.8 crore in the quarter ended 30 June 2026.

- **Lenskart Solutions** posted consolidated adjusted net profit increased 239.83% YoY and 10.76% QoQ to Rs 221.84 crore in Q1 FY27. Net sales increased 43.27% YoY and 7.89% QoQ to Rs 2,714.18 crore.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATACONSUM	1090.50	1061.90	**2.69%**
TMPV	349.60	343.00	**1.92%**
NTPC	344.25	339.45	**1.41%**
HINDUNILVR	2092.00	2063.00	**1.41%**
SHRIRAMFIN	1132.30	1117.20	**1.35%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	1046.25	1078.50	**-2.99%**
ICICIBANK	1406.80	1431.70	**-1.74%**
ULTRACEMCO	11706.00	11891.00	**-1.56%**
GRASIM	3257.00	3307.80	**-1.54%**
POWERGRID	266.60	269.45	**-1.06%**

(Source: Moneycontrol)

- **Vascon Engineers** has received a work order worth Rs 126.39 crore from the Executive Engineer, Public Works Department, Arvi Division, Wardha-Nagpur, Maharashtra, for the development of a 300-bed general hospital at Wardha-Nagpur.

- **Hindustan Petroleum Corp** has bought 4 million barrels of Middle Eastern crude through a spot tender, according to trade sources. The state-run refiner purchased 2 million barrels of Murban crude each from BP and PetroChina, along with 1 million barrels of Oman crude from Trafigura, with deliveries expected in early October.

- **Coal India** and ArcelorMittal Nippon Steel India signed an agreement for a coal gasification project. This collaboration will explore using synthesis gas near the steelmaker's Odisha pellet plant. The project aims to assess technical and commercial feasibility for a new facility. It also involves carbon capture, utilisation, and storage technology integration.

- **Mishra Dhatu Nigam** announced that it has secured S400 approval from GE Aerospace.

- **RailTel Corporation of India** announced that it has received a work order worth Rs 63 crore from Deendayal Port Authority (DPA).

- **CESC** announced that the Board of Directors of the Company have recommended the interim dividend of Rs 6 per equity Share.

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

Global News

- U.S. annual inflation rate slowed for a second consecutive month to 3.4% in July 2026, from 3.5% in June. On a monthly basis, the CPI rose 0.1%, rebounding from a 0.4% decline in June. The core consumer prices went up 0.2%, following a flat reading in June, while the annual core inflation rate eased to 2.5% from 2.6% in the previous month.

- U.S. government posted a $432 billion budget deficit in July 2026, widening from a $291 billion shortfall a year earlier.

- U.K. economy expanded by 0.4% quarter-on-quarter in Q2 2026, slowing from 0.6% growth in Q1. Services output rose 0.5% (vs 0.8% in Q1). On an annual basis, GDP expanded 1.2%, accelerating from 0.9% growth in Q1. The economy grew by 0.3% month-on-month in June 2026, compared with zero growth in May. On an annual basis, GDP rose 1.1%, slowing slightly from a revised 1.2% increase in May. GDP increased by 0.4% in the three months to June, following a revised 0.6% rise in the previous period.

- U.K.'s trade deficit increased to GBP 5.54 billion in June 2026, up from an upwardly revised GBP 3.46 billion in the previous month. Exports dropped 2.8% mom to GBP 80.21 billion, while imports edged down 0.2% to a four-month low of GBP 85.74 billion.

- U.K. industrial production fell 0.2% month-on-month in June 2026, easing from a 0.7% drop in the previous month. On a yearly basis, industrial output fell 0.2%, reversing May's 1% gain.
- U.K. manufacturing production fell 0.5% month-on-month in June 2026, worse than May's downwardly revised 0.2% drop. On an annual basis, manufacturing output growth slowed to a four-month low of 0.5% from a downwardly revised 2.0% in May.
- Eurozone industrial production was unchanged in June 2026, after a 0.3% rise in May. Year-over-year, industrial production increased 0.1%.
- Germany's current account surplus reached EUR 19 billion in June 2026, widening from a surplus of EUR 17.2 in the same period a year earlier.
- Japan's producer prices rose 7.2% year-on-year in July 2026, easing slightly from a marginally revised 7.3% increase in the prior month. On a monthly basis, producer prices edged up 0.1%, slowing sharply from an upwardly revised 0.5% gain in June.

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

Economic News

- Crude Oil traded at US$ 81.52/bbl (IST 17:00).
- INR weakened to Rs. 95.45 from Rs. 95.34 against each US$ resulting in daily change of 0.12%.
- India's trade deficit widened to $31.98 billion in July 2026, up from $27.5 billion in the same month of the previous year. Imports jumped by 18% annually to an all-time high of $76.2 billion while exports advanced by 19.2% to $44.2 billion.
- India's domestic passenger vehicle dispatches to dealers rose 34.3% year-on-year to 4,57,810 units in July, as per SIAM. Passenger vehicle dispatches stood at 3,40,772 units in July 2025. Total two-wheeler sales rose 22.6% to 19,23,483 units last month, as against 15,69,120 units in July last year. Three-wheeler dispatches to dealers were up 33.4% last month at 92,560 units as against 69,403 units in the year-ago period.
- India and the Southern African Customs Union have commenced discussions by signing Terms of Reference for a trade agreement. Expected to finalize within a few months, this preferential trade pact is designed to enhance bilateral trade significantly. India plays a pivotal role as a key supplier to SACU nations across a range of industrial sectors, promising to cultivate stronger economic ties throughout Africa.
- Bank deposits saw their fastest growth in nearly ten years by July. Overseas Indians deposited about $37 billion in foreign currency accounts. Bank credit growth also accelerated to its fastest pace since June 2024. This surge was driven by corporate demand and MSME lending programs. India garnered nearly $41 billion in total inflows by July 31.
- The government has initiated a proposal to refer the Foreign Contribution (Regulation) Amendment Bill, 2026 to a Joint Committee of Parliament. This significant bill will engage thirty-one members from the Lok Sabha and Rajya Sabha, tasked with scrutinizing its contents and offering recommendations, with a report expected by the Winter Session of 2026.
- The Reserve Bank of India is harmonizing interest rate determination methods for regulated entities. New guidelines will

define internal benchmarks and loan pricing components for banks. Floating rate loans will have benchmark resets not exceeding three months. Existing loans must migrate to the new framework by April 2029. These draft guidelines are open for public comment until September 11.

- A parliamentary committee suggests a self-reliant revenue model for UPI's financial sustainability. Amendments to the Payment and Settlement Systems Act now permit transaction charges on digital payments. The committee noted a significant funding gap between allocations and operational costs. Future merchant discount rate charges will be nominal and apply to limited high-value transactions.
- India nearly doubled its planned coal mining capacity in 2025, fuelling a global rise in proposed coal mine developments. India's proposed coal mine capacity rose to 638 million metric tons per annum (mtpa) from 329 mtpa a year earlier, accounting for almost all of the growth in the global coal project pipeline, which expanded 11% to 2,521 mtpa.
- Automakers privately expressed concerns about E20 fuel contamination, citing chloride and moisture issues. This data emerged after the auto lobby withdrew a complaint to the government. Industry tests found high chloride and moisture levels in many fuel samples. These contaminants are reportedly harming vehicles and reducing performance.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 14/08/2026

Ashok Leyland Limited	Financial Results
Bharat Dynamics Limited	Financial Results
Cochin Shipyard Limited	Financial Results
Natco Pharma Limited	Financial Results/Dividend/Fund Raising
NMDC Limited	Financial Results
Cholamandalam Financial Holdings Limited	Financial Results
Anupam Rasayan India Limited	Financial Results
Apeejay Surrendra Park Hotels Limited	Financial Results
3M India Limited	Financial Results
Aarey Drugs & Pharmaceuticals Limited	Financial Results
Advani Hotels & Resorts (India) Limited	Financial Results
Ahluwalia Contracts (India) Limited	Financial Results
Alkem Laboratories Limited	Financial Results
Allcargo Global Limited	Financial Results
Archies Limited	Financial Results
ARSS Infrastructure Projects Limited	Financial Results
Asian Hotels (West) Limited	Financial Results
Bannari Amman Sugars Limited	Financial Results
Belrise Industries Limited	Financial Results/Dividend
BF Utilities Limited	Financial Results

Bharat Road Network Limited	Financial Results
Bharati Defence and Infrastructure Limited	Financial Results
Borosil Limited	Financial Results
CSM Technologies Limited	Financial Results
D P Wires Limited	Financial Results
Deepak Builders & Engineers India Limited	Financial Results
Dishman Carbogen Amcis Limited	Financial Results
Easy Trip Planners Limited	Financial Results
Eros International Media Limited	Financial Results
Everest Kanto Cylinder Limited	Financial Results
Fertilizers and Chemicals Travancore Limited	Financial Results
GMR Power and Urban Infra Limited	Financial Results/Fund Raising
Gujarat Apollo Industries Limited	Financial Results
Gujarat Kidney And Super Speciality Limited	Financial Results
GVK Power & Infrastructure Limited	Financial Results
Heranba Industries Limited	Financial Results
Hitech Corporation Limited	Financial Results
HMT Limited	Financial Results
ICSA (India) Limited	Financial Results
Jai Balaji Industries Limited	Financial Results
Jindal Poly Films Limited	Financial Results
Jupiter Wagons Limited	Financial Results
Kitex Garments Limited	Financial Results/Fund Raising
Knowledge Marine & Engineering Works Limited	Financial Results/Stock Split
Kwality Wall's (India) Limited	Financial Results
Lux Industries Limited	Financial Results
Mamata Machinery Limited	Financial Results
Max Estates Limited	Financial Results
Mcleod Russel India Limited	Financial Results
MM Forgings Limited	Financial Results
Nectar Lifesciences Limited	Financial Results
NIBE Limited	Financial Results
Nitin Fire Protection Industries Limited	Financial Results
NMDC Steel Limited	Financial Results
Orchid Pharma Limited	Financial Results
Paramount Communications Limited	Financial Results
Patanjali Foods Limited	Financial Results/Dividend
Physicswallah Limited	Financial Results
Pilani Investment and Industries Corporation Limited	Financial Results
Prakash Pipes Limited	Financial Results
PTC Industries Limited	Financial Results
Puravankara Limited	Financial Results
Rajesh Exports Limited	Financial Results

Rubicon Research Limited	Financial Results
S&S Power Switchgears Limited	Financial Results
Schneider Electric Infrastructure Limited	Financial Results
Semac Construction Limited	Financial Results
Shivalik Rasayan Limited	Financial Results
Solarworld Energy Solutions Limited	Financial Results
Southern Petrochemicals Industries Corporation Limited	Financial Results
Sreeleathers Limited	Financial Results
Talwalkars Better Value Fitness Limited	Financial Results
TCI Finance Limited	Financial Results
TD Power Systems Limited	Fund Raising
Tips Films Limited	Financial Results
Tube Investments of India Limited	Financial Results
Turtlemint Fintech Solutions Limited	Financial Results
Udayshivakumar Infra Limited	Financial Results
UFLEX Limited	Financial Results
Valor Estate Limited	Financial Results
Voltas Limited	Financial Results
Western Carriers (India) Limited	Financial Results
Zaggle Prepaid Ocean Services Limited	Financial Results
Zee Media Corporation Limited	Financial Results

(Source: NSE)

Corporate Actions as on 14/08/2026

Apollo Hospitals Enterprise Limited	Dividend - Rs 10 Per Sh
Astral Limited	Dividend - Rs 2.50 Per Share
Dynamatic Technologies Limited	Interim Dividend - Rs 3 Per Share
Ganesh Consumer Products Limited	Dividend - Rs 2.50 Per Share
Godawari Power And Ispat limited	Dividend - Re 1 Per Share
Hindustan Aeronautics Limited	Dividend - Rs 10 Per Sh
Hindustan Petroleum Corporation Limited	Dividend - Rs 19.25 Per Share
Indian Oil Corporation Limited	Dividend - Rs 1.25 Per Share
Kalyani Investment Company Limited	Dividend - Rs 10 Per Share
Mangalam Cement Limited	Dividend - Rs 1.50 Per Share
Minda Corporation Limited	Dividend - Re 0.80 Per Share
NCC Limited	Dividend - Rs 2.20 Per Share
Premco Global Limited	Interim Dividend - Rs 2 Per Share
RBL Bank Limited	Dividend - Re 1 Per Share
REC Limited	Dividend - Rs 1.55 Per Share
Sanghvi Movers Limited	Dividend - Rs 2 Per Share
Sarda Energy & Minerals Limited	Dividend - Rs 2 Per Share

Sonata Software Limited	Interim Dividend - Rs 1.25 Per Share
The Anup Engineering Limited	Dividend - Rs 12 Per Share
The Federal Bank Limited	Dividend - Rs 1.20 Per Share
The Sandesh Limited	Dividend - Rs 5 Per Share
Tourism Finance Corporation of India Limited	Dividend - Re 0.60 Per Share
Xchanging Solutions Limited	Dividend - Rs 2 Per Share

(Source: NSE)

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