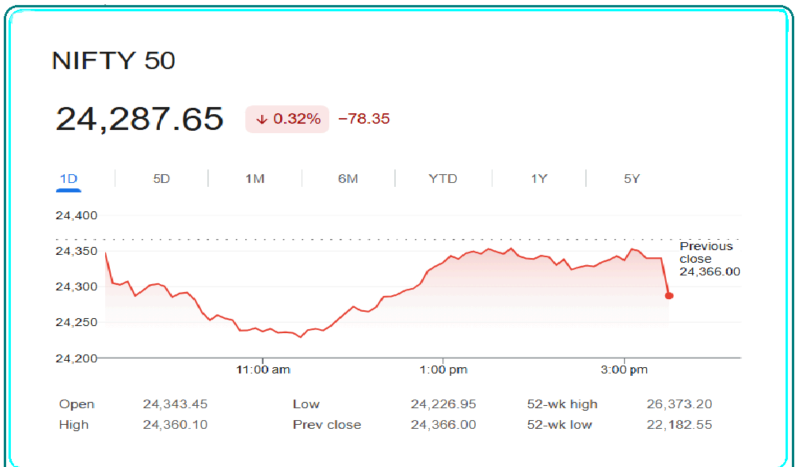
EQUITY DAILY REPORT

17th August 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24287.65	24366.00	**-0.32%**
S&P BSE SENSEX	77728.16	78009.25	**-0.36%**
NIFTY MID100	63817.00	63782.15	**0.05%**
NIFTY SML100	19809.25	19738.55	**0.36%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity benchmarks ended with modest losses, extending their losing streak to a second consecutive session, as investors continued to focus on sector- and stock-specific bets amid stronger-than-expected Q1 FY27 earnings and persistent geopolitical concerns. The Nifty settled below the 24,300 level.
- The S&P BSE Sensex lost 281.09 points or 0.36% to 77,728.16. The Nifty 50 index declined 78.35 points or 0.32% to 24,287.65. The Sensex declined 0.45% in two consecutive trading sessions, while the Nifty fell 1.20% in five consecutive trading sessions.
- The BSE 150 MidCap Index rose 0.18% and the BSE 250 SmallCap Index advanced 0.06%.
- Among the sectoral indices, the Nifty Realty index (up 1.46%), the Nifty Metal index (up 1.26%) and the Nifty Media index (up 0.36%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.75%), the Nifty FMCG index (down 1.05%) and the Nifty Consumer Durables index (down 0.46%) 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 **1494** contracts at the end of the day.
- **Long** position build up for the **August** series has been witnessed in **RELIANCE**, **ONGC**, **ICICIBANK**, **HDFCBANK**.
- **Short** position build up for the **August** series has been witnessed in **BRITANNIA**, **ETERNAL**.
- **Unwinding** position for the **August** series has been witnessed in **BHARTIARTL**, **SBIN**, **INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57497.80	57491.10	0.01%
NIFTY AUTO	29178.10	29207.90	-0.10%
NIFTY FMCG	48105.05	48615.05	-1.05%
NIFTY IT	30807.80	31357.75	-1.75%
NIFTY METAL	13104.60	12941.70	1.26%
NIFTY PHARMA	26341.55	26445.55	-0.39%
NIFTY REALTY	908.70	895.65	1.46%
BSE CG	80744.45	80120.02	0.78%
BSE CD	65412.58	65702.75	-0.44%
BSE Oil & GAS	26293.31	26273.21	0.08%
BSE POWER	7649.81	7643.35	0.08%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	69220.25	68713.80	0.74%
HANG SENG	25453.23	25116.85	1.34%
STRAITS TIMES	5768.46	5743.59	0.43%
SHANGHAI	3982.65	3927.18	1.41%
KOSPI	CLOSED	6977.94	-
JAKARTA	CLOSED	6401.89	-
TAIWAN	45857.27	45811.01	0.10%
KLSE COMPOSITE	1725.89	1727.39	-0.09%
All ORDINARIES	9279.00	9313.20	-0.37%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	108280.21	105584.66
NSE F&O	112541.53	104258.29

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2535.10

(Source: NSE)

Corporate News

- **PTC Industries** reported a consolidated net profit of Rs 29.2 crore in Q1 FY27, which is higher by 466.2% as compared with the PAT figure of Rs 5.2 crore posted in Q1 FY26. Total income increased by 83% year-on-year (YoY) to Rs 197.1 crore during the period under review.

- **Cochin Shipyard** reported a 19.38% decline in consolidated net profit to Rs 151.45 crore on a 2.40% increase in revenue from operations to Rs 1,094.21 crore in Q1 FY27 over Q1 FY26.

- **Larsen & Toubro** said that L&T Energy Hydrocarbon Offshore (LTEH Offshore) has secured an 'ultra-mega' order from a prestigious client in the Middle East. The value of this 'ultra-mega' contract is more than Rs 15,000 crore.

- **ONGC** has received a US Treasury license to resume full operations in Venezuela. This approval removes sanctions-related risks, allowing expanded production and new agreements. ONGC Videsh holds stakes in San Cristobal and Carabobo oil projects. The company expects to recover pending dividends and potentially take operatorship. India seeks to diversify oil resources amid heightened geopolitical risks.

- **Airtel** has revised its prepaid recharge portfolio, discontinuing several plans including the popular Rs 299 pack. Users seeking 1.5GB daily data for 28 days will now have to opt for the Rs 349 recharge, while the Rs 859 plan has been repriced to Rs 899. Several other 1.5GB/day and 2GB/day plans have also been withdrawn.

- **Tata Consultancy Services** has launched TCS ADD™ AgentHub, a role-based, enterprise ready, and trusted AI platform that enables the use of agentic AI in drug development at scale. This new agentic AI workforce transforms clinical trials and pharmacovigilance services while maintaining regulatory and audit requirements.

- **Swiggy** has introduced Guru, an AI-powered business assistant for its restaurant partners. This platform offers 24x7 support and data-driven decision-making capabilities. Guru helps manage operations and improve sales through a conversational interface. It analyzes sales funnels and provides actionable performance insights. The assistant supports over 20 vernacular languages for

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	1049.90	1029.50	**1.98%**
TATASTEEL	186.00	183.50	**1.36%**
HDFCLIFE	543.00	535.85	**1.33%**
ONGC	238.49	236.40	**0.88%**
AXISBANK	1227.30	1217.40	**0.81%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1325.00	1360.00	**-2.57%**
INFY	1139.90	1169.20	**-2.51%**
SUNPHARMA	1882.00	1930.00	**-2.49%**
TCS	2313.20	2361.00	**-2.02%**
NESTLEIND	1470.00	1499.10	**-1.94%**

(Source: Moneycontrol)

- **Saatvik Green Energy**'s Mahindra unveiled its new Scorpio Lifestyler pickup truck for global markets. This new vehicle will launch in India by April 2027. The automaker plans to price the entry-level model below nineteen point seven nine lakh. It combines pickup utility with SUV comfort and features. The Scorpio Lifestyler will also be sold internationally.

- Ola Electric introduced its Shakti energy storage series. This groundbreaking lineup incorporates locally sourced LFP battery technology for various uses. Home users can expect the Shakti Gen2 to arrive by November 2026, while the Shakti Rack and Mahashakti for businesses will roll out in March 2027. The goal is to effectively capture and use clean energy on all levels.

wider accessibility.

- **Lupin Ltd** announced receiving final USFDA approval for its generic Pitolisant tablets. These tablets are indicated for treating excessive daytime sleepiness in patients. The US health regulator approved strengths of 4.45 mg and 17.8 mg. Lupin's Pitolisant tablets are bioequivalent to Wakix, a prescription medicine.

- **Aurobindo Pharma** announced its subsidiary Eugia Pharma received a USFDA warning letter. This follows an inspection of their Telangana formulation manufacturing facility. The inspection concluded with four observations and an official action indicated status. The company stated existing US market supplies remain unaffected by this development.

- **Sun Pharmaceutical Industries** said that the company and certain subsidiaries have secured a favourable outcome in the long-running US antitrust litigation related to the 2008 Pfize-Ranbaxy patent settlement for generic Lipitor (atorvastatin).

- **Juniper Green Energy** received a Letter of Award from SECI for a 230 MW renewable energy project. This project will provide round-the-clock power at a tariff of Rs 5.26 per unit. The company won this bid in an e-reverse auction conducted by SECI.

- **Aurobindo Pharma**'s US facility received a Voluntary Action Indicated classification. The US FDA closed its inspection of the Raleigh manufacturing plant. This classification allows applications for inhalers and other products to proceed. The inspection covered inhaler, dermatology, and transdermal product manufacturing operations.

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

Global News

- China’s retail sales rose 0.6% year-on-year in July 2026, slowing from 1% growth in June. On a monthly basis, retail sales rose 0.06%, following a 0.35% gain in the previous period.

- China’s industrial production expanded 4.5% yoy in July 2026, slowing from a 5.3% rise in June. Monthly, industrial output rose by 0.11%.

- China's fixed-asset investment dropped by 6.7% year-on-year in the January to July 2026 period, worse than 5.7% decline recorded in the first half of the year. On a monthly basis, fixed-asset investment decreased by 1.42% in July, accelerating from a 0.37% fall in the preceding period.
- China's surveyed urban unemployment rate rose to 5.2% in July 2026 from 5.0% in June.
- China house prices fell 3.2% year-on-year in July 2026, following a 3.3% decline in the previous month. On a monthly basis, new home prices edged down 0.1%, matching June's decline.
- U.S. retail sales fell 0.6% month-on-month in July 2026, reversing June's 0.2% gain. Core retail sales decreased 0.3% month-over-month in June 2026, following a 0.2% decline in June.
- U.S. University of Michigan's consumer sentiment index fell to 51 in early August 2026, down from 55.2 in July.
- U.S. business inventories came in virtually unchanged in June after climbing by an upwardly revised 0.4% in May.
- U.K. Rightmove House Price Index dropped by 1.0% (-GBP 3,832) this month to GBP 372,359. While a price drop in July is normal, this month's fall is much larger than the ten-year average in July (0.2%).
- Japan's GDP grew 0.3% quarter-on-quarter in Q2 2026, slowing from Q1's pace. The economy expanded at an annualized rate of 1.1% in Q2 2026, easing from a marginally revised 1.9% growth in the previous quarter.
- Japan's industrial production rose 1.9% month-over-month in June 2026, picking up from a 0.1% increase in the previous month. On an annual basis, industrial output grew by 4.9%, reversing a 2.1% decline in May.

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

Economic News

- Crude Oil traded at US$ 82.88/bbl (IST 17:00).
- INR weakened to Rs. 95.62 from Rs. 95.44 against each US$ resulting in daily change of 0.19%.
- The Reserve Bank of India shortened its zero-cost FX swap facility for banks. This action followed substantial foreign deposit inflows from non-resident Indians. Policymakers also considered domestic liquidity effects and fundraising costs. The overseas fundraising supported the rupee, which had reached record lows earlier. These measures have bolstered foreign exchange reserves significantly.
- The government is discussing a 50 basis point reduction in interest subvention for Kisan Credit Card loans. This move aims to align subsidies with recent policy rate cuts by the Reserve Bank of India. Banks currently receive a 1.5% subsidy to offer loans at a 7% interest rate. Discussions are preliminary and part of extending the scheme until 2031-32. Farmers repaying promptly will continue to receive additional interest benefits.
- The government is increasing scrutiny of sugar stocks due to surging prices. Large industrial buyers are now providing consumption data to the food ministry. Sugar mills must now detail sales of 500 metric tonnes or more annually. Physical stock checks are being conducted at mills across various states. This action follows observations of discrepancies in reported sugar stock data.

- India has set maximum LPG production targets for refineries and upstream companies. This move aims to build a domestic supply buffer after import disruptions. The government will review these production schedules every six months. Companies must maintain adequate infrastructure for LPG storage and transport. This framework ensures adequate domestic availability and fair prices for consumers.

- India's solar cell and module manufacturing capacity has grown significantly. However, the nation still imports essential upstream components like polysilicon. China dominates global photovoltaic manufacturing, supplying most of India's imports. India's solar capacity is expanding, requiring greater domestic component production. Expanding from polysilicon to cell manufacturing is critical for future integration.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 18/08/2026

B.A.G Films and Media Limited	Financial Results
Balkrishna Industries Limited	Fund Raising
Bharat Petroleum Corporation Limited	Fund Raising
International Gemological Institute Limited	Dividend
Piccadily Agro Industries Limited	Dividend

(Source: NSE)

Corporate Actions as on 18/08/2026

Sun TV Network Limited	Interim Dividend - Rs 5 Per Share
Ecos (India) Mobility & Hospitality Limited	Dividend - Rs 2.38 Per Share
Jullundur Motor Agency (Delhi) Limited	Dividend - Rs 2 Per Share & Special Dividend Re 1 Per Share
Kirloskar Pneumatic Company Limited	Face Value Split (Sub-Division) - From Rs 2/- Per Share To Re 1/- Per Share
Mahanagar Gas Limited	Dividend - Rs 18 Per Share
NGL Fine-Chem Limited	Dividend - Rs 1.75 Per Share
Rail Vikas Nigam Limited	Dividend - Re 0.71 Per Share
ROUTE MOBILE LIMITED	Dividend - Rs 2 Per Share
Seshaasai Technologies Limited	Dividend - Rs 2.50 Per Share
Syrma SGS Technology Limited	Dividend - Rs 1.50 Per Share
Thejo Engineering Limited	Dividend - Rs 5 Per Share

(Source: NSE)

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