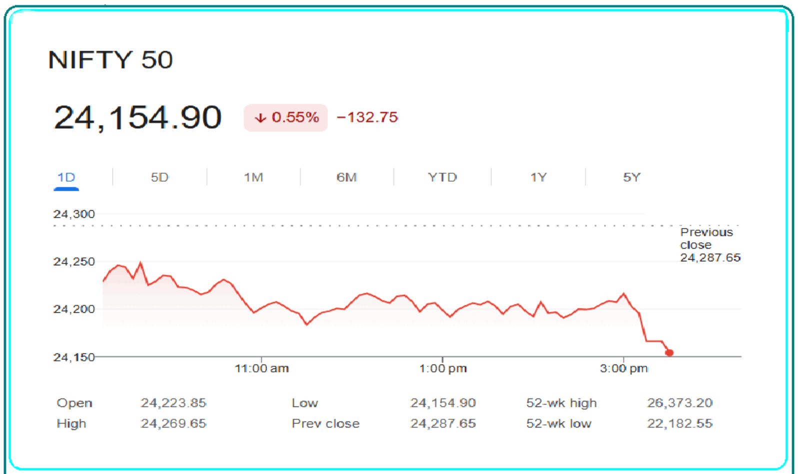
SHRIRAM Insight

HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

18th August 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24154.90	24287.65	**-0.55%**
S&P BSE SENSEX	77235.46	77728.16	**-0.63%**
NIFTY MID100	63539.40	63817.00	**-0.43%**
NIFTY SML100	19808.85	19809.25	**0.00%**

(Source: NSE, BSE)

Market Wrap Up

- The headline equity benchmarks ended with substantial losses, weighed down by renewed geopolitical concerns in the Middle East and a surge in crude oil prices following the expiry of the US-Iran ceasefire, while uncertainty over the reopening of the Strait of Hormuz further dampened investor sentiment. The Nifty also remained under pressure amid volatility surrounding the weekly Nifty 50 derivatives expiry and settled below the 24,200 level. The S&P BSE Sensex dropped 492.70 points or 0.63% to 77,235.46. The Nifty 50 index lost 132.75 points or 0.55% to 24,154.90. The Sensex declined 1.08% in three consecutive trading sessions, while the Nifty fell 1.74% in six consecutive trading sessions. The BSE 150 MidCap Index fell 0.35% and the BSE 250 SmallCap Index added 0.19%. On the BSE, 1,938 shares rose and 2,378 shares fell. A total of 231 shares were unchanged.

- Among the sectoral indices, the Nifty Media index (up 0.40%), the Nifty Auto index (up 0.30%) and the Nifty Pharma index (up 0.08%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 1.93%), the Nifty Realty index (down 1.42%) and the Nifty PSu Bank index (down 1.01%) 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 **6990** contracts at the end of the day.

- **Long** position build up for the **August** series has been witnessed in **GRASIM**, **FORTIS**.

- **Short** position build up for the **August** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.

- **Unwinding** position for the **August** series has been witnessed in **POWERGRID**, **TITAN**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57262.40	57497.80	-0.41%
NIFTY AUTO	29264.55	29178.10	0.30%
NIFTY FMCG	47734.80	48105.05	-0.77%
NIFTY IT	30213.45	30807.80	-1.93%
NIFTY METAL	13025.30	13104.60	-0.61%
NIFTY PHARMA	26361.90	26341.55	0.08%
NIFTY REALTY	895.80	908.70	-1.42%
BSE CG	80368.84	80744.45	-0.47%
BSE CD	64880.92	65412.58	-0.81%
BSE Oil & GAS	26238.36	26293.31	-0.21%
BSE POWER	7599.80	7649.81	-0.65%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	67460.73	69220.25	-2.54%
HANG SENG	25471.15	25453.23	0.07%
STRAITS TIMES	5701.40	5768.46	-1.16%
SHANGHAI	3990.30	3982.65	0.19%
KOSPI	6869.83	6977.94	-1.55%
JAKARTA	6449.83	6401.89	0.75%
TAIWAN	45308.68	45857.27	-1.20%
KLSE COMPOSITE	1733.36	1725.89	0.43%
All ORDINARIES	9274.20	9279.00	-0.05%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	109466.84	108280.21
NSE F&O	136852.81	112541.53

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1651.53
NET SELL	-

(Source: NSE)

Corporate News

- **Maruti Suzuki**'s Fronx has achieved 2 lakh exports in under 38 months. This Indian-made SUV is now the fastest to reach this significant export milestone. The vehicle began its export journey in June 2023 and has reached many countries. Fronx has become a key contributor to the automaker's overseas performance. It is now India's number one exported passenger vehicle since FY25.

- **Axis Bank** is broadening its corporate banking services beyond just lending. The lender targets fee income and low-cost deposits from corporate ecosystems. It handles collections, payments, trade finance, and salary accounts for businesses. Investment banking and wealth management services are also offered to companies and their promoters. This strategy aims to build liability and fee franchises by managing more corporate cash flows.

- **Sigma Advanced Systems** secured orders worth approximately Rs 155 crore from the Government of India for its Indrajaal Ranger anti-drone patrol vehicle.

- **Piramal Pharma** has completed the acquisition of 1,46,400 equity shares of Rs 10 each of Yapan Bio (an associate company) from its existing shareholders for an aggregate cash consideration of approximately Rs 76 crore. Pursuant to the acquisition, the Company's shareholding in Yapan has increased from 33.33% to 74.00% of the equity share capital of Yapan.

- **Ceigall India**, jointly with Sushee Infra Mining, has received four letters of acceptance from the Ministry of Road Transport & Highways (MoRTH) for undertaking the EPC construction of 204 km of intermediate-lane roads on NH-913 in Arunachal Pradesh.

- **Highway Infrastructure** received a Letter of Acceptance (LoA) worth Rs 80.16 crore from the National Highways Authority of India (NHAI) for operations at Palayam Fee Plaza in Tamil Nadu.

- **KPI Green Energy** announced that it has energized 130 MW AC / 195 MW DC solar capacity under its 370 MW AC / 677 MW DC Wind-Solar Hybrid Power Project (IPP) at Bharuch, Gujarat.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
AXISBANK	1243.00	1227.30	**1.28%**
MAXHEALTH	1014.40	1003.70	**1.07%**
M&M	3421.50	3390.40	**0.92%**
GRASIM	3278.70	3250.50	**0.87%**
POWERGRID	268.00	266.15	**0.70%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TMPV	322.80	330.20	**-2.24%**
ASIANPAINT	2628.40	2687.50	**-2.20%**
INFY	1115.00	1139.90	**-2.18%**
WIPRO	178.06	181.90	**-2.11%**
HCLTECH	1298.00	1325.00	**-2.04%**

(Source: Moneycontrol)

- **Hindustan Copper** plans significant capital investment over the next five to six years. This expansion drive includes exploration and mine revival initiatives. The company is also pursuing strategic partnerships for growth opportunities. Rising domestic copper demand fuels these ambitious expansion plans.

- **Hatsun Agro Products** said its Arun Icecreams brand participated in the New York India Day Parade 2026 on Madison Avenue on 16 August, marking its debut at the event and strengthening its presence in the US market.

- **Nelco** announced a $20 million strategic investment in Lunar Holdco, Inc., doing business as Elveo Mobile.

- Biocon said that its US subsidiary has received supplemental U.S. Food and Drug Administration (FDA) approval for Yesintek (ustekinumab-kfce) single-dose prefilled autoinjector in various strengths.

- **EMS** announced the receipt of the lowest bidder (L-1) status awarded by Municipal Corporation Jodhpur for sewerage work. The value of this contract is Rs 129.80 crore.

- Inox Clean Energy has acquired Vena Energy India's renewable platform for Rs 6,000 crore. This rapid transaction was completed within two months, showcasing strong financing capabilities. Vena Energy India's portfolio includes operational and developing solar, wind, and BESS assets. Following this acquisition, Inox Clean's operational capacity will reach approximately four gigawatts.

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

Global News

- U.K. unemployment rate was unchanged at 4.9% in the three months to June 2026. The number of people claiming unemployment benefits decreased by 11 thousand to 1.665 million in July 2026, following a revised 6.4 thousand drop in the previous month.

- Eurozone ZEW Indicator of Economic Sentiment rose further to 31.4 in August 2026. The assessment of the current situation also improved, with the index surging 16.2 points to -21.5, while inflation expectations declined 8 points to 2.4.

- Germany's ZEW Indicator of Economic Sentiment rose 7.9 points to 34.2 in August 2026. The current conditions also improved, with the corresponding indicator rising 16.5 points to -61.1.

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

Economic News

- Crude Oil traded at US$ 84.95/bbl (IST 17:00).
- INR weakened to Rs. 95.69 from Rs. 95.62 against each US$ resulting in daily change of 0.07%.
- India’s unemployment rate fell to a four-month low of 5.1% in July from 5.5% in June, with rural unemployment declining to 4.5%, official PLFS data showed. Women and youth also recorded improvements. The labour force participation rate rose to 55.4%, while the worker population ratio climbed to 52.5%.
- India has sought consultations with the US at the World Trade Organization over Washington’s tariff-rate quota on quartz surface products, effective August 15 for four years. India, which exported about $380 million of these products to the US in FY26, said it has a "substantial interest" in the matter.
- India's soyoil imports are expected to reach a record 620,000 metric tons in August, about 46% above the current marketing year's monthly average, as competitive prices and disruptions to sunflower oil shipments from the Black Sea encourage refiners to increase soyoil purchases ahead of festive demand, traders said.
- India's GDP growth forecast stands at seven percent for the April-June quarter, marking a four-quarter low and a slowdown from prior growth rates. The industrial sector is projected to expand by seven point seven percent, with agriculture and services also seeing improvements. Overall growth is expected to moderate, yet nominal GDP growth is set to reach a remarkable four-year high.
- The Centre proposes extending vehicle age limits by five years. National permit authorisations may be granted electronically for up to five years. Temporary vehicle registrations will have revised validity periods. Automotive component manufacturers will be brought under trade certificate provisions. Vehicle documentation and owner details will be digitized through VAHAN.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 19/08/2026

Lohia Corp Limited	Financial Results
Xtranet Technologies Limited	Financial Results

(Source: NSE)

Corporate Actions as on 19/08/2026

Bata India Limited	Interim Dividend - Rs 25 Per Share
CESC Limited	Interim Dividend - Rs 6 Per Share
Flair Writing Industries Limited	Dividend - Re 0.50 Per Share
Honda India Power Products Limited	Dividend - Rs 23 Per Share
JK Paper Limited	Dividend - Rs 4 Per Share
Kovai Medical Center & Hospital Limited	Dividend - Rs 15 Per Share
Kshitij Polyline Limited	Rights 2:5 @ Premium Rs 1.17/-
LG Balakrishnan & Bros Limited	Dividend - Rs 22 Per Share
Page Industries Limited	Interim Dividend - Rs 200 Per Share

(Source: NSE)

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