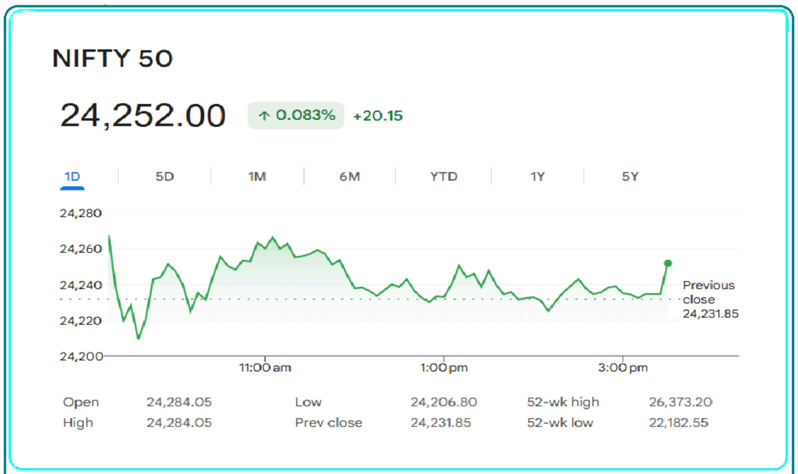
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

21st August 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24252.00	24231.85	**0.08%**
S&P BSE SENSEX	77540.83	77537.72	**0.00%**
NIFTY MID100	63735.75	63671.55	**0.10%**
NIFTY SML100	19977.75	19841.45	**0.69%**

(Source: NSE, BSE)

Market Wrap Up

- The domestic equity benchmarks ended flat, as persistent geopolitical tensions surrounding Iran and volatility in crude oil prices kept investor sentiment cautious. The Nifty settled above the 24,250 mark.
- The S&P BSE Sensex ended flat at 77,540.83, up 3.11 points or 0.00%. The Nifty 50 index rose 20.15 points or 0.08% to 24,252.
- The BSE 150 MidCap Index rose 0.12% and the BSE 250 SmallCap Index rallied 0.31%.
- Among the sectoral indices, the Nifty Metal index (up 0.83%), the Nifty Private Bank index (up 0.51%) and the Nifty Realty index (up 0.37%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty FMCG index (down 0.75%), the Nifty Auto index (down 0.62%) and the Nifty Media index (down 0.56%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **September** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **24695** contracts at the end of the day.
- **Long** position build up for the **September** series has been witnessed in **ICICIBANK**, **HDFCBANK**, **TCS**.
- **Short** position build up for the **September** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **SBIN**, **BAJFINANCE**, **INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57761.95	57495.90	0.46%
NIFTY AUTO	29124.60	29301.75	-0.60%
NIFTY FMCG	47510.95	47863.25	-0.74%
NIFTY IT	30532.25	30673.05	-0.46%
NIFTY METAL	13172.60	13060.25	0.86%
NIFTY PHARMA	26359.75	26416.00	-0.21%
NIFTY REALTY	911.60	907.95	0.40%
BSE CG	79219.75	79168.59	0.06%
BSE CD	65276.34	65092.81	0.28%
BSE Oil & GAS	26090.60	26143.23	-0.20%
BSE POWER	7541.66	7493.65	0.64%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	66016.36	66216.79	-0.30%
HANG SENG	26009.46	25698.49	1.21%
STRAITS TIMES	5688.96	5671.91	0.30%
SHANGHAI	3905.20	3903.72	0.04%
KOSPI	6912.95	6852.58	0.88%
JAKARTA	6525.69	6501.58	0.37%
TAIWAN	45224.29	44933.74	0.65%
KLSE COMPOSITE	1736.48	1736.71	-0.01%
All ORDINARIES	9269.70	9298.50	-0.31%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	111233.20	110062.15
NSE F&O	356793.94	349498.53

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	542.71

(Source: NSE)

Corporate News

- **Zydus Lifesciences** announced the receipt of final approval from the United States Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Ascorbic Acid Injection USP, 25,000 mg/50 mL (500 mg/mL), 5,000 mg/10 mL (500 mg/mL).

- **Tata Motors** will increase prices for its cars and SUVs by up to Rs 25,000. This price adjustment will affect both internal combustion engine and electric vehicle models. The company cites rising input and commodity costs as the primary reason for this decision. This move follows similar announcements made by other major automobile manufacturers. The price revision aims to partially offset increased operational expenses for the automaker.

- **Welspun Corp** has secured its largest-ever single order, valued at about $1.8 billion (Rs. 17,200 crore), for the supply of pipes from its manufacturing facility in the U.S.

- Vedanta Aluminium, a subsidiary of the **Vedanta Group**, has launched two new alloys for the automotive sector. The Copper-Doped Alloy enhances durability for high-performance engine components. The Vedanta Foundry Alloy offers lightweighting and improved strength for vehicles. These advanced materials support the industry's demand for efficient and resilient vehicles. The company aims to be the world's largest primary billet producer.

- **Tata Power Renewable Energy** launched its 'Har Ghar Solar' initiative in Bihar on Thursday. This program aims to facilitate rooftop solar adoption in five lakh homes over three years. The initiative is backed by the state government and offers significant combined subsidies. Awareness and affordability are key drivers for solar power adoption in Bihar.

- **Hindustan Power** secured Rs 1,135 crore for its 300 MW solar project. This significant financial closure supports the Lalitpur district development. The project progresses as planned, strengthening Uttar Pradesh's renewable energy capacity. A long-term power purchase agreement is in place with UPPCL. This initiative contributes to the state's clean energy requirements.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
POWERGRID	272.40	264.80	**2.87%**
HDFCLIFE	554.80	542.00	**2.36%**
KOTAKBANK	402.80	397.35	**1.37%**
NESTLEIND	1477.10	1458.00	**1.31%**
BEL	414.00	409.40	**1.12%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
MARUTI	13565.00	13809.00	**-1.77%**
TRENT	2924.00	2970.00	**-1.55%**
HCLTECH	1302.50	1318.40	**-1.21%**
INDIGO	5110.00	5165.00	**-1.06%**
ONGC	236.40	238.50	**-0.88%**

(Source: Moneycontrol)

- **Glenmark Pharmaceuticals** said that its subsidiary Glenmark Pharmaceuticals Inc., USA, has launched Calcium Gluconate Injection USP in the US in three presentations, including single-dose vials and a pharmacy bulk package.
- **Data Patterns (India)** said that it has received order worth about Rs. 585.76 crore from Bharat Electronic (BEL) for procurement of radar electronics.
- **Bajel Project** said that its joint venture entity AnantGrid Projects One (AGPOPL) has emerged as the successful bidder for the Lakadia-Part A inter-state transmission project in Gujarat.
- **Walchandnagar Industries** received an order worth Rs 30.53 crore from the Vikram Sarabhai Space Centre (VSSC) for the supply of HS200 Motorcase for the Gaganyaan mission.
- **Saatvik Green Energy**'s material subsidiary, Saatvik Solar Industries has received an order from reputed independent power producer/EPC player to supply solar photovoltaic (PV) modules. The order valued at Rs 190 crore.
- **RailTel Corporation of India** said that it has secured order worth Rs 164 crore from Western Coalfields.
- **Pace Digitek** announced that Lineage Power (a material subsidiary) of the company has received a Letter of Award aggregating to Rs. 92.92 crore (including GST) from Kalpa Power for the supply and commissioning support of a Battery Energy Storage System (BESS) of 100 MWh capacity.
- **B.L. Kashyap & Sons** announced that it has secured an order worth Rs 183.18 crore from Realkraft Ventures LLP (Century Group).

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

Global News

- China's foreign direct investment has decreased by 6.2%, totaling 438.3 billion yuan ($65.22 billion).
- U.S. initial jobless claims fell to 206,000 in the week ended August 15th, a decrease of 6,000 from the previous week's revised level of 212,000. Continuing claims rose by 18,000 to 1,799,000 in the previous week.
- U.S. Conference Board said its leading economic index rose by 0.2% in July after edging down by a revised 0.1% in June.
- U.K. retail sales volumes fell 0.5% month-on-month in July 2026, following a downwardly revised 0.7% rise in June. Core retail sales declined 0.9%, offsetting last month's 0.9% increase. On an annual basis, retail sales increased 1.6%, the smallest rise in three months, down from 3.8% in June.
- U.K. S&P Global Composite PMI rose to 52.5 in August from 52.5 in the previous month. The manufacturing PMI eased to

51.5 in August 2026, the lowest level in five months, from 51.9 in July while the services PMI rose to 52.8 in August 2026 from 52.1 in July.

- U.K. GfK Consumer Confidence Index rose to -14 in August 2026 from -17 in the previous month.
- Eurozone flash composite PMI rose to 52.1 in August 2026 from 52 in July. The manufacturing PMI rose to 52.8 in August from 51.9 in the previous month while the services PMI was unchanged at 51.7 in August 2026.
- Germany's flash composite PMI eased to 51 in August 2026 from 51.3 in July. The manufacturing PMI jumped to 54.1 in August 2026 from 52.2 in the previous month while the services PMI fell to 48.5 in August 2026 from 49.8 in July.
- French S&P Global Composite PMI eased to 48.8 in August 2026 from 49.4 in July. The manufacturing PMI rose to 51.5 in August 2026 from 49.8 in July while the services PMI fell to 48.4 in August 2026 from 49.6 in July.
- France's manufacturing business climate index rose to 103 in August 2026, above the expected and July's 101.
- Japan's annual inflation rate accelerated to 1.9% in July 2026 from a marginally revised 1.6% in the previous month. Core inflation rose to 1.8% from June's 1.6%. On a seasonally adjusted monthly basis, inflation rose 0.4%, up from 0.3% in the previous month.
- Japan's S&P Global Composite PMI Business Activity Index rose to 53.4 in August 2026 from a final 52.7 in July. The manufacturing PMI increased to 55.1 in August 2026 from 54.5 in the previous month while the services PMI Business Activity Index rose to 52.3 in August 2026 from a final 51.2 in the previous month.

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

Economic News

- Crude Oil traded at US$ 87.04/bbl (IST 17:00).
- INR remained flat at Rs. 95.72.
- India's HSBC Composite Flash PMI edged up to 54.6 in August 2026 from a final 54.3 in the previous month. The manufacturing PMI eased to 52.9 in August 2026 from 53.5 in July while the services PMI increased to 54.5 in August 2026 from 53.3 in the previous month.
- India's infrastructure output rose by 5.4% from the previous year in July of 2026, extending the upwardly revised, ten-month high of 6% in the previous month.
- Oman and India are strengthening economic ties, moving towards strategic business partnerships. A new Comprehensive Economic Partnership Agreement enhances trade access for Indian exports. Bilateral trade saw a significant increase during the recent fiscal year. Exports to Oman rose substantially after the agreement's implementation. Oman now serves as a key gateway for Indian businesses expanding internationally.
- India is creating a dedicated channel to ease European and British company investments. This mechanism will offer dedicated support and help investors navigate government approvals. The initiative aims to facilitate capital flow beyond just trade agreements. Senior officials will directly monitor this new investor facilitation process. This move follows

recent liberalizations in sectors like insurance and banking.

- Centre has allowed duty-free imports of 1 million metric tonnes of sugar as prices surge nearly 40% in two months amid tightening supplies. The move comes alongside stricter stockholding limits for bulk consumers, with festive demand expected to rise through November and weather conditions adding pressure to sugarcane availability.

- India has eased export payment rules, allowing rupee settlements with non-Asian Clearing Union countries. This move aims to promote wider use of the local currency in international trade transactions. Eligible rupee export receipts will now qualify for trade-policy benefits and count towards exporter obligations. The changes align with recent Reserve Bank of India foreign-exchange rules permitting broader rupee usage.

- India has signed a long-term supply arrangement with Mauritius for petrol, diesel and aviation fuel, strengthening energy cooperation between the two countries. The agreements, signed during Oil Minister Hardeep Puri's visit, include a government-to-government MoU on oil and gas cooperation and a sales agreement with Indian Oil. Mauritius disclosed no volumes.

- Domestic air passenger traffic slipped 4.80% to 1.20 crore in July from 1.26 crore recorded in the year-ago month, as per DGCA. Passengers carried by domestic airlines during January-July 2026 increased to 984.03 lakh against 977.79 lakh a year ago, thereby registering an annual growth of 0.64%, according to the Directorate General of Civil Aviation (DGCA).

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 22/08/2026

Heranba Industries Limited	Financial Results
Tega Industries Limited	Fund Raising
Sigachi Industries Limited	Fund Raising

Board Meetings as on 24/08/2026

Piramal Finance Limited	Fund Raising
UCO Bank	Fund Raising
Gabriel India Limited	Fund Raising
Patel Integrated Logistics Limited	Dividend

(Source: NSE)

Corporate Actions as on 24/08/2026

Gillette India Limited	Dividend - Rs 60 Per Share
International Gemological Institute Limited	Interim Dividend - Rs 2.55 Per Share
National Aluminium Company Limited	Dividend - Re 1 Per Share
Senco Gold Limited	Dividend - Re 1 Per Share
SJVN Limited	Dividend - Re 0.35 Per Share
TD Power Systems Limited	Face Value Split (Sub-Division) - From Rs 2/- Per Share To Re 1/- Per Share

(Source: NSE)

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