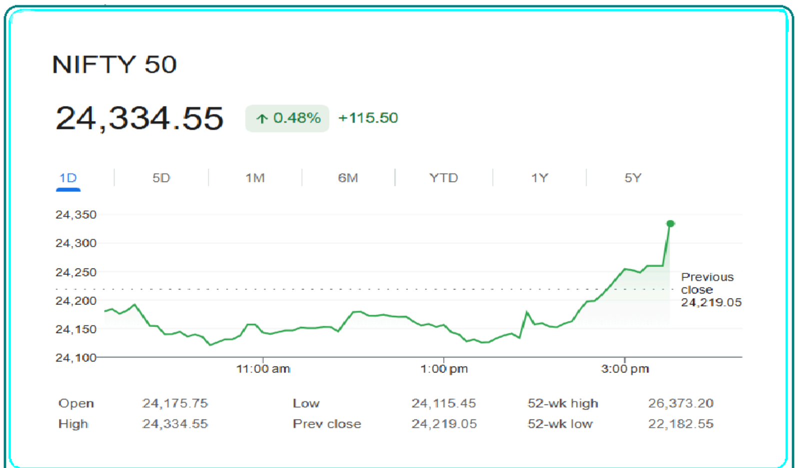
EQUITY DAILY REPORT

25th August 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24334.55	24219.05	**0.48%**
S&P BSE SENSEX	77656.09	77369.11	**0.37%**
NIFTY MID100	64162.90	63817.25	**0.54%**
NIFTY SML100	19906.60	19926.75	**-0.10%**

(Source: NSE, BSE)

Market Wrap Up

- The domestic equity indices ended with modest gains, erasing their losses and closing in the green, supported by buying at lower levels and purchases in beaten-down stocks. Nifty closed above the 24,300 level. Healthcare, PSU bank and IT shares advanced, while private bank and metal stocks declined.
- The S&P BSE Sensex jumped 286.98 points or 0.37% to 77,656.09. The Nifty 50 index added 115.50 points or 0.48% to 24,334.55.
- The BSE 150 MidCap Index rose 0.37% and the BSE 250 SmallCap Index shed 0.17%.
- Among the sectoral indices, the Nifty Healthcare Index (up 1.09%), the Nifty Consumer Durables index (up 0.93%) and the Nifty Pharma index (up 0.85%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Private Bank index (down 0.20%), Nifty Metal index (down 0.07%) and the Nifty bank Index (down 0.02%) the 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 **54616** contracts at the end of the day.
- **Long** position build up for the **September** series has been witnessed in **RELIANCE**, **SBIN**, **ICICIBANK**, **INFY**.
- **Short** position build up for the **September** series has been witnessed in **HDFCBANK**, **AXISBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57514.20	57525.95	-0.02%
NIFTY AUTO	29216.90	29101.30	0.40%
NIFTY FMCG	47706.95	47527.80	0.38%
NIFTY IT	30771.80	30596.90	0.57%
NIFTY METAL	13372.30	13381.45	-0.07%
NIFTY PHARMA	26564.00	26339.30	0.85%
NIFTY REALTY	917.80	917.10	0.08%
BSE CG	79258.67	79096.37	0.21%
BSE CD	65539.22	65010.59	0.81%
BSE Oil & GAS	26253.64	26179.57	0.28%
BSE POWER	7559.15	7547.34	0.16%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	65856.43	65528.09	0.50%
HANG SENG	25511.10	25517.33	-0.02%
STRAITS TIMES	5735.68	5680.46	0.97%
SHANGHAI	3889.44	3882.01	0.19%
KOSPI	6742.74	6696.96	0.68%
JAKARTA	CLOSED	6501.67	-
TAIWAN	45169.46	44762.32	0.91%
KLSE COMPOSITE	CLOSED	1736.33	-
All ORDINARIES	9374.90	9316.70	0.62%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	106655.03	110202.40
NSE F&O	324873.54	378543.84

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1593.53
NET SELL	-

(Source: NSE)

Corporate News

- **Larsen & Toubro** said it won a "major" order under its classification system, valued at Rs. 5,000-10,000 crore, for three battery energy storage system (BESS) projects in the Middle East.

- **Biocon Ltd** said its arm Biocon Biologics has received marketing approval for its pegfilgrastim biosimilar from Japan's Ministry of Health, Labour and Welfare (MHLW).

- **Natco Pharma** is investing US$ 14 million in eGenesis, Inc. through its wholly owned subsidiaries, NATCO Pharma (Canada) Inc. for an amount of US$ 9.5 million and NATCO Pharma South Africa Proprietary for an amount of US$ 4.5 million, though convertible promissory notes. Previously in 2024, NATCO Pharma had invested US$ 8 million in eGenesis, Inc. through preferred stock. The total investment made by NATCO Pharma in eGenesis, Inc. now stands at US$ 22 million.

- **Tata Communications** and **Tata Motors Passenger Vehicles** (TMPV) today announced collaboration to power the newly launched Sierra.ev, with in-built 5G cellular connectivity, paving the way for futuristic Software-Defined Vehicles (SDVs).

- **Axis Bank** expects credit growth to exceed the industry average this fiscal year. Strong demand stems from corporate sectors and retail borrowers seeking gold loans. Data centres and manufacturing are driving corporate credit expansion significantly. Retail growth is fueled by gold loans and borrowers from smaller cities. The bank is also preparing two key businesses for potential public listings.

- **Mahindra & Mahindra** plans to expand its export operations with a new pickup truck. This vehicle will target markets in South Africa, Australia, and Latin America. The Lifestyler pickup will also be introduced to the Indian market in 2027. Company officials expressed confidence in maintaining electric vehicle sales growth. Mahindra's automotive sector saw an 18.2 percent export volume increase last fiscal.

- **VA Tech Wabag** announced the signing of a 'mega' contract for the Doha SWRO Desalination Plant with Recarbonation System - Stage II in Kuwait.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	3110.00	2998.60	**3.72%**
MAXHEALTH	1016.00	990.50	**2.57%**
APOLLOHOSP	8889.00	8702.00	**2.15%**
INDIGO	5218.00	5115.00	**2.01%**
ADANIPORTS	1702.70	1672.10	**1.83%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HDFCLIFE	546.70	552.95	**-1.13%**
CIPLA	1422.00	1437.90	**-1.11%**
ONGC	234.00	236.55	**-1.08%**
COALINDIA	404.00	406.90	**-0.71%**
HINDALCO	1051.05	1058.50	**-0.70%**

(Source: Moneycontrol)

- **Puravankara** said that it has entered into a joint development agreement (JDA) for a 7.83-acre land parcel in South-East Bengaluru, with an estimated gross development value (GDV) of Rs 1,100 crore.

- **Suzlon** Group is set to launch an impressive 1,325 MW of wind energy projects in Andhra Pradesh, backed by a Rs. 10,000 crore investment. This venture promises to create about 4,000 direct and indirect jobs. With a vision to integrate an additional 5 GW of renewable energy projects by 2030, Suzlon is reinforcing its commitment to sustainable energy, having already invested Rs. 12,000 crore in the region since 2004.

- **State Bank of India** expects to gather USD 10 billion from non-residents and foreign investors. The bank's total business aims to reach Rs 200 lakh crore by 2030. This ambitious target aligns with the country's economic growth projections. SBI's balance sheet could potentially double every six years.

- **Hyundai Motor India** and Jio-bp are integrating their electric vehicle charging networks. This partnership expands charging points to over 37,000 across India. Users can now access Jio-bp's 7,000 charging points through the myHyundai app. Hyundai plans to significantly increase its own fast-charging stations by 2030.

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

Global News

- Germany's economy expanded 0.3% in Q2 2026, easing from 0.4% growth in the previous period. On an annual basis, GDP grew 1.0% in Q2, accelerating from a 0.7% expansion in Q1.

- Germany's Ifo Business Climate Index rose to 88.8 in August. The expectations component climbed to 89.1 from 86.8 in July. The assessment of current conditions improved to 88.5 from 86.5.

- French consumer confidence indicator remained unchanged at 86 in August 2026.

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

Economic News

- Crude Oil traded at US$ 82.53/bbl (IST 17:00).
- INR strengthened to Rs. 95.42 from Rs. 95.75 against each US$ resulting in daily change of 0.34%.
- India has mobilised $73 billion in foreign exchange inflows in less than 11 weeks, surpassing the scale and pace of the RBI's 2013 FCNR(B) swap scheme.
- Strong FCNR(B) deposit inflows have led analysts to raise their estimates for dollar mobilisation through the scheme. Jefferies now expects inflows to reach $90-100 billion by August 31, up from its earlier estimate of $70-80 billion.
- India's house price index rose 1.1% quarter-on-quarter in Q1 FY27 (April-June). The HPI registered an annual growth of 3.6 per cent in Q1:2026-27, same as in the corresponding quarter of the previous year
- UPI has completed a decade of transforming India's digital payments ecosystem, with annual transactions surging from 1.78 crore in 2016-17 to 24,162 crore in 2025-26. Transaction value rose to Rs 314 lakh crore, while monthly volumes hit a record 2,366 crore in July 2026. UPI now operates across 11 countries and accounts for nearly 49% of global real-time payments.
- The Central Government has lifted the export ban on wheat flour and related products. This policy amendment allows for immediate overseas shipments of these items. Previously, India had halted wheat exports in July 2022 due to rising local prices.
- The government is contemplating the enforcement of mandatory chloride contamination limits for E20 petrol. Automakers have expressed worries over fuel quality and its potential effects on vehicle components. Presently, the chloride contamination thresholds are merely part of voluntary standards for ethanol-blended petrol. The Bureau of Indian Standards is striving to implement these requirements as mandatory.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 26/08/2026

IRB InvIT Fund	Fund Raising
Juniper Green Energy Limited	Financial Results
Keystone Realtors Limited	Fund Raising
Mold-Tek Technologies Limited	Dividend/Bonus
Simbhaoli Sugars Limited	Financial Results
Vikas EcoTech Limited	Financial Results

(Source: NSE)

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