

## Market Overview: September 4, 2026

### Pre-Market: Positive Start!

Indian equity benchmarks are poised for a positive opening today, tracking upbeat cues from GIFT Nifty and global markets.

**GIFT Nifty:** Traded higher around the 24,042 mark (up ~109.5 points or 0.46%), signaling a relief rally at the start of the session on Dalal Street.

- **India VIX:** Market fear gauge fell 2.2% to settle at 11.34, reflecting relatively lower near-term panic despite ongoing global headwinds.
- **Domestic Currency:** The Indian Rupee extended its winning run to five consecutive sessions, appreciating 22 paise to close at 94.51 against the US dollar, supported by robust foreign currency deposit inflows and central bank intervention.

### Global Cues

- **US Markets:** Wall Street rallied on Thursday backed by declining bond yields and comments from Federal Reserve Governor Christopher Waller hinting at a patient stance on rate hikes.
- **Asian Shares:** Trading mostly higher following Wall Street's lead as investors pared down aggressive bets on a September rate hike by the Fed. Hang Seng futures rose 1.1%, while Australia's S&P/ASX 200 gained 0.1%. Japan's Topix slipped 0.2%.

### Institutional Activity (FII / DII)

- **Foreign Portfolio Investors (FPIs):** Net sellers of shares worth ₹2,345.87 crore
- **Domestic Institutional Investors (DIIs):** Net buyers worth ₹ 4,977.46 crore

### Commodities:

- **Crude Oil:** Prices rose, heading for strong weekly gains driven by supply risks and geopolitical tensions concerning U.S.–Iran hostilities.
- **Gold:** Maintained a steady posture, staying on track for weekly gains ahead of critical U.S. non-farm payrolls data.

**Key Takeaways** : Indian Markets more in Consolidation with More Stock Action/Volatility Persist Due to Profit Sales/SEBI-Review CAS-Little Relief For Traders (Options)

### Capital Market Stocks in Focus

SEBI-CAS settlement price review

---High F&O Market Share Stocks in Focus

"BSE, Angel One, Groww-"

### Cables Manufacture in Focus

----Finolex Cables, Polycab-Price hikes undertaken-----

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Ultra Tech (UTCEM) just put up its press release with launch of wires and cables today with ' \*Ultravolt\* '. 2 days ago,

UTCEM had announced commercial production of Wires & Light Duty Cables.

· \*Plan is to reach more than one lakh retailers\* and further activate availability through over 5,000 UltraTech Building Solutions (UBS) outlets. Already tapped 500 districts and 6,000 pin codes, with commitment to growth and innovation.

### Defence Stocks in Focus(Selective)

1. HAL-GE Aerospace ships three F404-IN20 engines
2. Bharat Forge-Agreement with Thales for rocket systems
3. Avalon Technologies-Manufacturing JV with Germany's Zollner Elektronik

### Stocks in Focus

#### Most of (+) Traders Trade with SL

- Ceigall India-Lol worth approximately Rs. 5,300cr from REC
- Cipla - Partnership with Qilu Pharmaceutica for bio-similar drug
- Indian Energy Exchange-Strong August operational data
- Sterlite Tech-3,000 crore capex for 50% capacity expansion by FY29.
- Gland Pharma-Promoter selling (block-deal)
- Adani Ports-To add 6 Mn TEUs of capacity over next 5 years

## New IPO Listing

ESDS Software Solution (Main Board)

Priority Jewels Limited (Main Board)

## Technical Outlook

NIFTY FUT CLOSE ; 23973 SA : 23913 SB : 23853 RA : 24090 RB : 24208  
TREND : SIDEWAYS ////////////////////////////////// BUY ABOVE 24080 TGT 24140/24170  
SL 24010 ////////////////////////////////// SELL BELOW 23862 TGT 23800/23770 SL  
23940

BANKNIFTY FUT CLOSE : 57666 SA : 57537 SB : 57408 RA : 57925 RB :  
58180 TREND : SIDEWAYS ////////////////////////////////// SELL BELOW 56430  
TGT 57300/57220 SL 57575 ////////////////////////////////// BUY ABOVE 57890 TGT  
58020/58080 SL 57750

FINNIFTY FUT CLOSE : 25966 SA : 26052 SB : 25971 RA : 26238 RB :  
26342 TREND : SIDEWAYS ////////////////////////////////// BUY ABOVE 26246 TGT  
26310/26340 SL 26170 ////////////////////////////////// SELL BELOW 26020 GT 25950/25920  
SL 26097

## Nifty 50

| Gainers         |                       |               |                    |            |
|-----------------|-----------------------|---------------|--------------------|------------|
| Company Name    | Last Traded Price (₹) | Volume (Nos.) | Previous Close (₹) | Change (%) |
| Adani Ports     | 1706.5                | 3370497       | 1672.7             | 2.02       |
| Axis Bank       | 1267                  | 3309215       | 1253.9             | 1.04       |
| HDFC Bank       | 706.65                | 27770641      | 700.8              | 0.83       |
| Tata Consumer   | 1019.2                | 935640        | 1012               | 0.71       |
| Bharat Electron | 408.6                 | 7803527       | 405.75             | 0.7        |
| Asian Paints    | 2541.6                | 589499        | 2527.5             | 0.56       |
| Coal India      | 420.05                | 15286175      | 417.85             | 0.53       |
| Grasim Inds     | 3310                  | 2310916       | 3294.9             | 0.46       |
| Bharti Airtel   | 1869                  | 3700992       | 1862.8             | 0.33       |
| Adani Enterp.   | 2901                  | 816124        | 2891.8             | 0.32       |

## Nifty 50

| Losers           |                       |               |                    |            |
|------------------|-----------------------|---------------|--------------------|------------|
| Company Name     | Last Traded Price (₹) | Volume (Nos.) | Previous Close (₹) | Change (%) |
| Bajaj Auto       | 11920                 | 304296        | 12130              | -1.73      |
| Tech Mahindra    | 1598                  | 1647483       | 1623               | -1.54      |
| Trent            | 2815.6                | 520969        | 2852.3             | -1.29      |
| Cipla            | 1394.7                | 549749        | 1412.8             | -1.28      |
| M & M            | 3150                  | 1826312       | 3190               | -1.25      |
| ITC              | 263                   | 17813663      | 266.3              | -1.24      |
| TCS              | 2320.1                | 1892786       | 2348               | -1.19      |
| UltraTech Cem.   | 11275                 | 247711        | 11393              | -1.04      |
| HCL Technologies | 1319                  | 1515496       | 1331.5             | -0.94      |
| Titan Company    | 5027                  | 571600        | 5074               | -0.93      |

## Bank Nifty

| Gainers         |                       |               |                    |            |
|-----------------|-----------------------|---------------|--------------------|------------|
| Company Name    | Last Traded Price (₹) | Volume (Nos.) | Previous Close (₹) | Change (%) |
| IDFC First Bank | 87.5                  | 48178595      | 85.09              | 2.83       |
| IndusInd Bank   | 1004.8                | 1959777       | 978                | 2.74       |
| Yes Bank        | 22.54                 | 57376675      | 22.15              | 1.76       |
| Union Bank (I)  | 189                   | 13672026      | 186.86             | 1.15       |
| Axis Bank       | 1267                  | 3309215       | 1253.9             | 1.04       |
| HDFC Bank       | 706.65                | 27770641      | 700.8              | 0.83       |
| ICICI Bank      | 1430                  | 10503351      | 1426.5             | 0.25       |
| SBI             | 1023.4                | 7371804       | 1020.9             | 0.24       |

## Bank Nifty

| Losers           |                       |               |                    |            |
|------------------|-----------------------|---------------|--------------------|------------|
| Company Name     | Last Traded Price (₹) | Volume (Nos.) | Previous Close (₹) | Change (%) |
| Federal Bank     | 344.6                 | 6683672       | 353.35             | -2.48      |
| Punjab Natl.Bank | 116.32                | 11831844      | 117                | -0.58      |
| Kotak Mah. Bank  | 421.15                | 5991118       | 423.5              | -0.55      |
| AU Small Finance | 1072                  | 506657        | 1077.9             | -0.55      |
| Canara Bank      | 125.8                 | 13360020      | 126.3              | -0.4       |
| Bank of Baroda   | 240.44                | 4789865       | 241.2              | -0.32      |

| Category | BUY VALUE(Cr) | SELL VALUE (Cr) | NET VALUE (Cr) |
|----------|---------------|-----------------|----------------|
| FII/FPI  | 13,596.04     | 15,941.91       | -2,345.87      |
| DII      | 17,063.65     | 12,086.19       | 4,977.46       |

| Company Name | Closing Price  | Change (%) |
|--------------|----------------|------------|
| Nifty 50     | 23,873.45 Down | -0.17      |
| Bank Nifty   | 57,380.60 Up   | 0.36       |
| Fin Nifty    | 25,923.05 Up   | 0.43       |
| Nifty Midcap | 14,760 Up      | 0.66       |
| Sensex       | 76,152.86 Down | -0.55      |
| Gold         | 155701 Down    | -0.05      |
| SILVER       | 242391 Up      | 0.02       |
| DJIA         | 53686.11 Up    | 1.18       |
| S& P 500     | 7747.71 Up     | 1.06       |
| NASDAQ       | 26584.06 Up    | 1.4        |
| RUSS 2K      | 2968.271 Up    | 0.51       |
| NASDAQ 100   | 29482.32 Up    | 1.16       |

| As on 03-09-2026 | Nifty Down 0.17% | Bank Nifty Down 0.55% |
|------------------|------------------|-----------------------|
| Index Futures    | Net Positon      | No.Contacts           |
| Client           | Longs Add        | 5926                  |
| DII              | Longs Add        | 20                    |
| FII              | Shorts Add       | 5939                  |
| Pro              | Longs Unwind     | 7                     |

| As on 03-09-2026     | Nifty Down 0.17%    | Bank Nifty Down 0.55% |
|----------------------|---------------------|-----------------------|
| <b>Stock Futures</b> | <b>Net Positon</b>  | <b>No.Contacts</b>    |
| <b>Client</b>        | <b>Longs Add</b>    | <b>3077</b>           |
| <b>DII</b>           | <b>Shorts Add</b>   | <b>3077</b>           |
| <b>FII</b>           | <b>Longs Add</b>    | <b>16895</b>          |
| <b>Pro</b>           | <b>Longs Unwind</b> | <b>16895</b>          |

| As on 03-09-2026         | Nifty Down 0.17%    | Bank Nifty Down 0.55% |
|--------------------------|---------------------|-----------------------|
| <b>Index Option Call</b> | <b>Net Positon</b>  | <b>No.Contacts</b>    |
| <b>Client</b>            | <b>Longs Add</b>    | <b>109470</b>         |
| <b>DII</b>               | <b>Longs Unwind</b> | <b>150</b>            |
| <b>FII</b>               | <b>Shorts Add</b>   | <b>12954</b>          |
| <b>Pro</b>               | <b>Longs Unwind</b> | <b>96366</b>          |

| As on 03-09-2026        | Nifty Down 0.17%   | Bank Nifty Down 0.55% |
|-------------------------|--------------------|-----------------------|
| <b>Index Option Put</b> | <b>Net Positon</b> | <b>No.Contacts</b>    |
| <b>Client</b>           | <b>Shorts Add</b>  | <b>89681</b>          |
| <b>DII</b>              | <b>Longs Add</b>   | <b>2031</b>           |
| <b>FII</b>              | <b>Longs Add</b>   | <b>56826</b>          |
| <b>Pro</b>              | <b>Longs Add</b>   | <b>30824</b>          |

| As on 03-09-2026           | Nifty Down 0.17% | Bank Nifty Down 0.55% |
|----------------------------|------------------|-----------------------|
| Net Contracts Long & Short | Net Positon      | No.Contacts           |
| Client                     | Longs Add        | 55169                 |
| DII                        | Shorts Add       | 9761                  |
| FII                        | Longs Add        | 59444                 |
| Pro                        | Longs Unwind     | 104853                |

| As on 03-09-2026      | Nifty Down 0.17% | Bank Nifty Down 0.55% |
|-----------------------|------------------|-----------------------|
| Stock Option Net Call | Net Positon      | No.Contacts           |
| Client                | Longs Add        | 38896                 |
| DII                   | Shorts Add       | 6997                  |
| FII                   | Shorts Add       | 5435                  |
| Pro                   | Shorts Add       | 26464                 |

| As on 03-09-2026     | Nifty Down 0.17% | Bank Nifty Down 0.55% |
|----------------------|------------------|-----------------------|
| Stock Option Net Put | Net Positon      | No.Contacts           |
| Client               | Shorts Add       | 12518                 |
| DII                  | Longs Unwind     | 1588                  |
| FII                  | Longs Add        | 10051                 |
| Pro                  | Longs Add        | 4055                  |

## Corporate Actions

| Company Name                             | Purpose                            | Ex-Date   | Record Date |
|------------------------------------------|------------------------------------|-----------|-------------|
| AIA Engineering Ltd                      | Dividend - Rs. - 16.0000           | 04-Sep-26 | 05-Sep-26   |
| Arvind Ltd                               | Final Dividend - Rs. - 4.5000      | 04-Sep-26 | 04-Sep-26   |
| BMW Industries Ltd                       | Final Dividend - Rs. - 0.4300      | 04-Sep-26 | 05-Sep-26   |
| Capri Global Capital Ltd                 | Final Dividend - Rs. - 0.2000      | 04-Sep-26 | 04-Sep-26   |
| Citadel Realty and Developers Ltd        | Final Dividend - Rs. - 0.5000      | 04-Sep-26 | 04-Sep-26   |
| Clean Science and Technology Ltd         | Final Dividend - Rs. - 4.0000      | 04-Sep-26 | 05-Sep-26   |
| Coal India Ltd                           | Final Dividend - Rs. - 5.2500      | 04-Sep-26 | 04-Sep-26   |
| Emcure Pharmaceuticals Ltd               | Final Dividend - Rs. - 3.6000      | 04-Sep-26 | 04-Sep-26   |
| Fineotex Chemical Ltd                    | Final Dividend - Rs. - 0.0500      | 04-Sep-26 | 04-Sep-26   |
| Finolex Cables Ltd                       | Final Dividend - Rs. - 9.0000      | 04-Sep-26 | 04-Sep-26   |
| Federal-Mogul Goetze (India) Ltd         | Interim Dividend - Rs. - 7.5000    | 04-Sep-26 | 04-Sep-26   |
| Federal-Mogul Goetze (India) Ltd         | Special Dividend - Rs. - 86.5000   | 04-Sep-26 | 04-Sep-26   |
| General Insurance Corporation of India   | Final Dividend - Rs. - 13.2500     | 04-Sep-26 | 04-Sep-26   |
| Gulf Oil Lubricants India Ltd            | Final Dividend - Rs. - 30.0000     | 04-Sep-26 | 04-Sep-26   |
| Hikal Ltd                                | Final Dividend - Rs. - 0.4000      | 04-Sep-26 | 04-Sep-26   |
| Hitech Corporation Ltd                   | Dividend - Rs. - 1.0000            | 04-Sep-26 | 04-Sep-26   |
| Indigo Paints Ltd                        | Final Dividend - Rs. - 5.0000      | 04-Sep-26 | 04-Sep-26   |
| Integrated Proteins Ltd                  | Stock Split From Rs.10/- to Rs.1/- | 04-Sep-26 | 04-Sep-26   |
| Jagsonpal Pharmaceuticals Ltd            | Final Dividend - Rs. - 4.0000      | 04-Sep-26 | 04-Sep-26   |
| Jonjua Overseas Ltd                      | Bonus issue 7:24                   | 04-Sep-26 | 04-Sep-26   |
| Mach Travel Solutions Ltd                | Final Dividend - Rs. - 0.5000      | 04-Sep-26 | 04-Sep-26   |
| Mazda Ltd                                | Final Dividend - Rs. - 4.0000      | 04-Sep-26 | 04-Sep-26   |
| Metro Brands Ltd                         | Final Dividend - Rs. - 3.0000      | 04-Sep-26 | 04-Sep-26   |
| Nahar Capital and Financial Services Ltd | Dividend - Rs. - 1.5000            | 04-Sep-26 | 04-Sep-26   |
| Nahar Polyfilms Ltd                      | Final Dividend - Rs. - 1.5000      | 04-Sep-26 | 04-Sep-26   |
| Nahar Spinning Mills Ltd                 | Dividend - Rs. - 1.0000            | 04-Sep-26 | 04-Sep-26   |
| Oil India Ltd                            | Final Dividend - Rs. - 1.0000      | 04-Sep-26 | 04-Sep-26   |
| OM Infra Ltd                             | Final Dividend - Rs. - 0.5000      | 04-Sep-26 | 04-Sep-26   |
| Oil and Natural Gas Corporation Ltd      | Final Dividend - Rs. - 1.0000      | 04-Sep-26 | 04-Sep-26   |
| Panasonic Energy India Company Ltd       | Final Dividend - Rs. - 1.9500      | 04-Sep-26 | 05-Sep-26   |
| Paradeep Phosphates Ltd                  | Final Dividend - Rs. - 1.5000      | 04-Sep-26 | 04-Sep-26   |
| Parmeshwar Metal Ltd                     | Final Dividend - Rs. - 1.2500      | 04-Sep-26 | 04-Sep-26   |

## Corporate Actions

| Company Name                      | Purpose                            | Ex-Date   | Record Date |
|-----------------------------------|------------------------------------|-----------|-------------|
| POCL Enterprises Ltd              | Final Dividend - Rs. - 0.8000      | 04-Sep-26 | 04-Sep-26   |
| Prevest Denpro Ltd                | Final Dividend - Rs. - 1.0000      | 04-Sep-26 | 05-Sep-26   |
| PVR Inox Ltd                      | Buy Back of Shares                 | 04-Sep-26 | 04-Sep-26   |
| Sandu Pharmaceuticals Ltd         | Final Dividend - Rs. - 1.0000      | 04-Sep-26 | 04-Sep-26   |
| Shipping Corporation of India Ltd | Final Dividend - Rs. - 1.0000      | 04-Sep-26 | 04-Sep-26   |
| Shilpa Medicare Ltd               | Final Dividend - Rs. - 0.6000      | 04-Sep-26 | 04-Sep-26   |
| SKP Securities Ltd                | Final Dividend - Rs. - 2.0000      | 04-Sep-26 | 05-Sep-26   |
| S.P. Apparels Ltd                 | Final Dividend - Rs. - 3.0000      | 04-Sep-26 | 04-Sep-26   |
| Speciality Restaurants Ltd        | Dividend - Rs. - 1.0000            | 04-Sep-26 | 04-Sep-26   |
| Sportking India Ltd               | Final Dividend - Rs. - 1.0000      | 04-Sep-26 | 05-Sep-26   |
| Stove Kraft Ltd                   | Final Dividend - Rs. - 3.5000      | 04-Sep-26 | 04-Sep-26   |
| Supriya Lifescience Ltd           | Final Dividend - Rs. - 1.0000      | 04-Sep-26 | 04-Sep-26   |
| Suraj Products Ltd                | Final Dividend - Rs. - 2.2500      | 04-Sep-26 | 05-Sep-26   |
| TCC Concept Ltd                   | Stock Split From Rs.10/- to Rs.2/- | 04-Sep-26 | 04-Sep-26   |
| Venus Pipes & Tubes Ltd           | Final Dividend - Rs. - 0.5000      | 04-Sep-26 | 04-Sep-26   |

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