

Current Market Scenario

8th Aug 2026

Indices Consolidation Continues

CAPSTOCKS

- Uncertainty on Strait of Hormuz stays
- Volatile crude oil prices
- US markets are at All Time High
- Stock specific action continues

INDEX WATCH

INDEX	8 th Aug	11 th July	% Change
Nifty	24,570	24,206	+ 1.5
Sensex	78,499	77,569	+ 1.1
Nifty Midcap	63,463	63,036	+ 0.6
BSE 250 Small	7,240	7,153	+ 1.2

Nifty Consolidation Continues **CAPSTOCKS**

Nifty Index Trading Days Spent Below 200 Day Moving Average

Rank	Start Date	End Date	Trading Days	Max Distance Below 200 DMA
1	06-May-2008	13-Apr-2009	227	-45.3%
2	10-Nov-1994	04-Oct-1995	207	-23.6%
3	02-Mar-2001	04-Dec-2001	188	-27.2%
4	02-May-2011	30-Jan-2012	188	-15.3%
5	06-Nov-1992	10-Aug-1993	165	-26.1%
6	20-Aug-2015	13-Apr-2016	159	-13.2%
7	27-May-1998	06-Jan-1999	157	-19.3%
8	17-Jul-2000	19-Jan-2001	131	-22.3%
9	27-Feb-2026	31-Jul-2026	103	-11.5%
10	10-Jul-2002	27-Nov-2002	95	-13.0%
11	26-Feb-2020	16-Jul-2020	95	-34.1%
12	14-May-2004	16-Sep-2004	90	-15.8%
13	10-Sep-1996	14-Jan-1997	85	-22.5%
14	30-Oct-1997	27-Feb-1998	82	-14.2%
15	20-Oct-1995	07-Feb-1996	75	-15.1%

Bumpy Start for Closing Auction Session

- Price discovery in Closing Auction Session raises confusion
- Derivative traders are worried on unreliable price discovery during CAS
- Lower market depth leading to this confusion

Nifty 50 – CAS Effect

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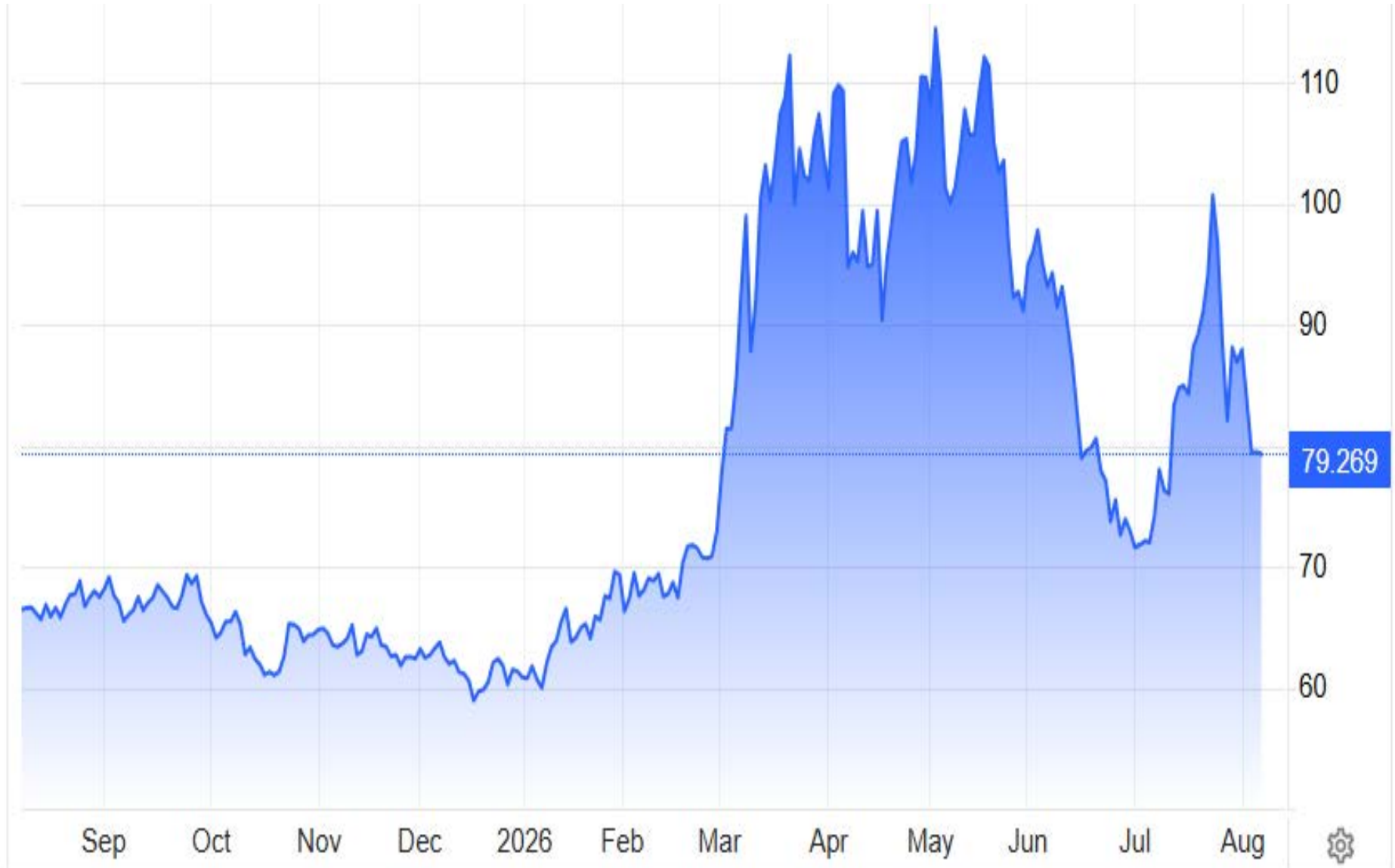
Date	Change in Points during CAS
Aug 3	+ 184
Aug 4	+ 150
Aug 5	+ 55
Aug 6	+ 8
Aug 7	+ 13

US – Iran War Updates **CAPSTOCKS**

- US Iran talks continuing
- Priority is to open Strait of Hormuz
- Charging of Fees by Iran on ships passing through Strait of Hormuz is the core point of disagreement
- Volatility in news flows will continue

Crude Oil Prices

CAPSTOCKS



Strong Auto Sales Continues

CAPSTOCKS

Company	% Change YoY
Tata Motors PV	+ 59
Maruti	+ 33
Hyundai	+ 25
M&M	+ 20
Tata Motors CV	+ 37
Ashok Leyland	+ 33
TVS Motor	+ 38
Eicher Motor	+ 34
Bajaj Auto	+ 30
Hero Moto	+ 19

Overall Auto Sales up by 25.8% YoY

Robust GST Collections ^{CAPSTOCKS}

Growth high

GST mop-up has seen exponential year-on-year growth in July.

Details of GST collections, monthly

■ Collections (in ₹ trillion)

■ Y-o-y growth (%)



PSU Divestment on Top Gear **CAPSTOCKS**

- Till Date in FY27, 8 divestments were made
- Around 51,000 Cr. realized by Govt
- Budget target of 80000 Cr. receipts through PSU divestment and asset monetization

Q1 Earnings

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- Strong revenue growth, margins under pressure
- Mid and Small cap showed relatively better performance when compared to large caps
- Chemicals showed huge increase in profits due to inventory gains

Q1 Result Performance

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	% Change (YoY)
	June 2026
Sales	21.6
Net Profit	7.4
Adjusted Net Profit	11.4

Results of 1,427 Companies

Monsoon Update

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- June Deficit at 40%, July had normal rainfall
- Aug – Sep to see below normal rainfall as per IMD forecast
- Kharif Sowing at 3% lower when compared to last year

Rainfall (in mm) up to 31 July, 2026

Region	Actual	Normal	% Departure from Long Period Average
EAST & NORTHEAST INDIA	529.3	752.5	-30%
NORTHWEST INDIA	254.4	287.8	-12%
CENTRAL INDIA	511.4	491.6	4%
SOUTH PENINSULA INDIA	280.1	365.5	-23%
COUNTRY AS A WHOLE	389.8	445.8	-13%

Sharp Move in Shares

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- Sharp up move or down move happening in select shares
- Conviction needed to hold shares to get meaningful return
- Business understanding a must for long term investors

Volatile South Korea Kospi CAPSTOCKS

6,264.18

↑ 94.08%

+3,036.50 past year

+ Follow

7 Aug, 12:11pm GMT+9 • [Disclaimer](#)

1D

5D

1M

6M

YTD

1Y

5Y

Max



Margin Trading On Uptrend **CAPSTOCKS**

Period	MTF (₹ Cr)	Bank LAS (₹ Cr)	NBFC LAS (₹ Cr)	Total leverage (₹ Cr)	Leverage YoY	Leverage / total market cap
FY07	139			139		
FY08	221	4,075	-	4,296		0.08%
FY09	145	2,287	-	2,432	(43.4%)	0.08%
FY10	215	2,860	-	3,075	26.5%	0.05%
FY11	134	2,880	-	3,014	(2.0%)	0.04%
FY12	119	3,000	-	3,119	3.5%	0.05%
FY13	84	3,100	-	3,184	2.1%	0.05%
FY14	36	3,800	-	3,836	20.5%	0.05%
FY15	65	5,434	-	5,499	43.4%	0.05%
FY16	77	6,419	7,669	14,165	157.6%	0.15%
FY17	84	4,750	12,782	17,616	24.4%	0.14%
FY18	4,137	5,556	16,092	25,785	46.4%	0.18%
FY19	4,072	6,456	15,723	26,251	1.8%	0.17%
FY20	3,289	6,188	7,940	17,417	(33.7%)	0.15%
FY21	12,397	5,587	8,304	26,288	50.9%	0.13%
FY22	24,525	6,807	11,473	42,805	62.8%	0.16%
FY23	25,757	7,633	13,389	46,779	9.3%	0.18%
FY24	57,107	8,492	21,814	87,414	86.9%	0.22%
FY25	71,095	10,080	26,488	107,663	23.2%	0.26%
FY26	109,786	10,546	34,136	154,468	43.5%	0.40%
FY27 YTD	143,533	10,546	40,964	195,043	26.3%	0.41%

US CPI INFLATION

%

***LAST TIME
INFLATION WAS
BELOW 2%***

NOW

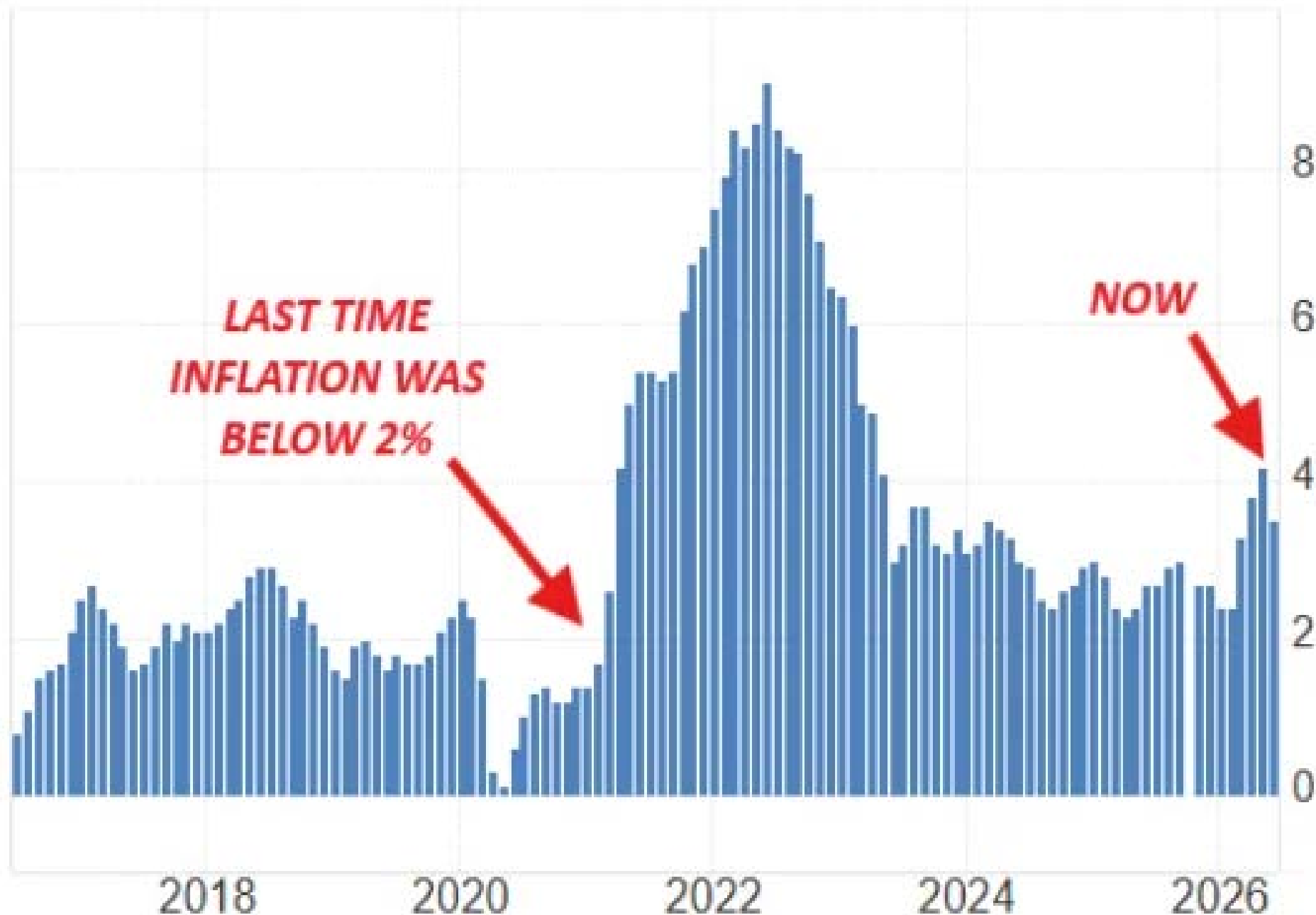
2018

2020

2022

2024

2026



Dollar Vs Yen

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FPI Cash Market Actions

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Period	Net Flows Cr.
July 2026	- 5,778
June 2026	- 49,028
May 2026	- 55,960
Apr 2026	- 43,706
July 2025 – Mar 2026	- 3,54,679
Mar 2025 –June 2025	+ 24.010
Oct 2024 - Feb 2025	- 3,23,763

**Overall sold 8,08,904 Cr.
Around \$84 Bn**

Events To Watch

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- FPI Activity
- Monsoon
- Q1 Results

Technicals

06th Aug 2026

Q NIFTY 50 (+) D Indicators

NIFTY AUGUST...



1d 5d 1m 3m 6m 1yr 5yr All

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Thank You