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Current Market Scenario

12th Sep 2026

Indices Drifts Lower

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- US Iran war escalates
- Crude Oil Prices up
- Pockets of Action in broader market
- Active Primary Market

INDEX WATCH

INDEX	11th Sep	8th Aug	% Change
Nifty	**23,398**	**24,570**	**- 4.7**
Sensex	**74,781**	**78,499**	**- 4.7**
Nifty Midcap	**62,197**	**63,463**	**- 2.0**
BSE 250 Small	**7,225**	**7,240**	**- 0.2**

Market Action Outside Index

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- Benchmark Indices sideways due to under performance of heavy weights
- Pockets of action in broader market
- Pharma, Chemicals, Defence, Aero space, Precision Engineering, Oil exploration are in fancy

Derating in Multiple Sectors

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- Multiple sectors like FMCG, Cement, Electrical durables see derating
- Lot of recent new listings giving investors multiple business investment avenues

Closing Auction Session

- Erratic Price discovery in Closing Auction Session
- Derivative traders impacted
- SEBI to review derivative settlement price methodology

Strong Primary Market

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YEAR	AMOUNT (Rs. cr)	NO. OF ISSUES
2013-14	15,234	83
2014-15	29,716	39
2015-16	34,322	42
2016-17	36,615	53
2017-18	98,984	81
2018-19	36,405	42
2019-20	37,677	39
2020-21	74,708	69
2021-22	1,30,376	76
2022-23	63,275	56
2023-24	84,421	106
2024-25	2,09,344	104
2025-26	2,04,713	154
2026-27 (as on 31/08/26)	1,07,198	62

IPO,FPO & OFS

Active Primary Market

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- Fund raising pipeline continue to remain strong
- Promotor selling, PE selling continues
- NSE and Jio Platform IPO’s lined up

NSE IPO

- NSE IPO price band 1700 -1785
- Market cap expected to be around 5 Lakh Crore
- Most traded share in unlisted market in past two years
- Pre IPO shareholders will have 6 months lock-in period

US – Iran War Updates

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- US Iran exchanges fire
- Iran not in a position to compromise on Strait of Hormuz
- Crude Oil prices at elevated levels

Crude Oil Prices

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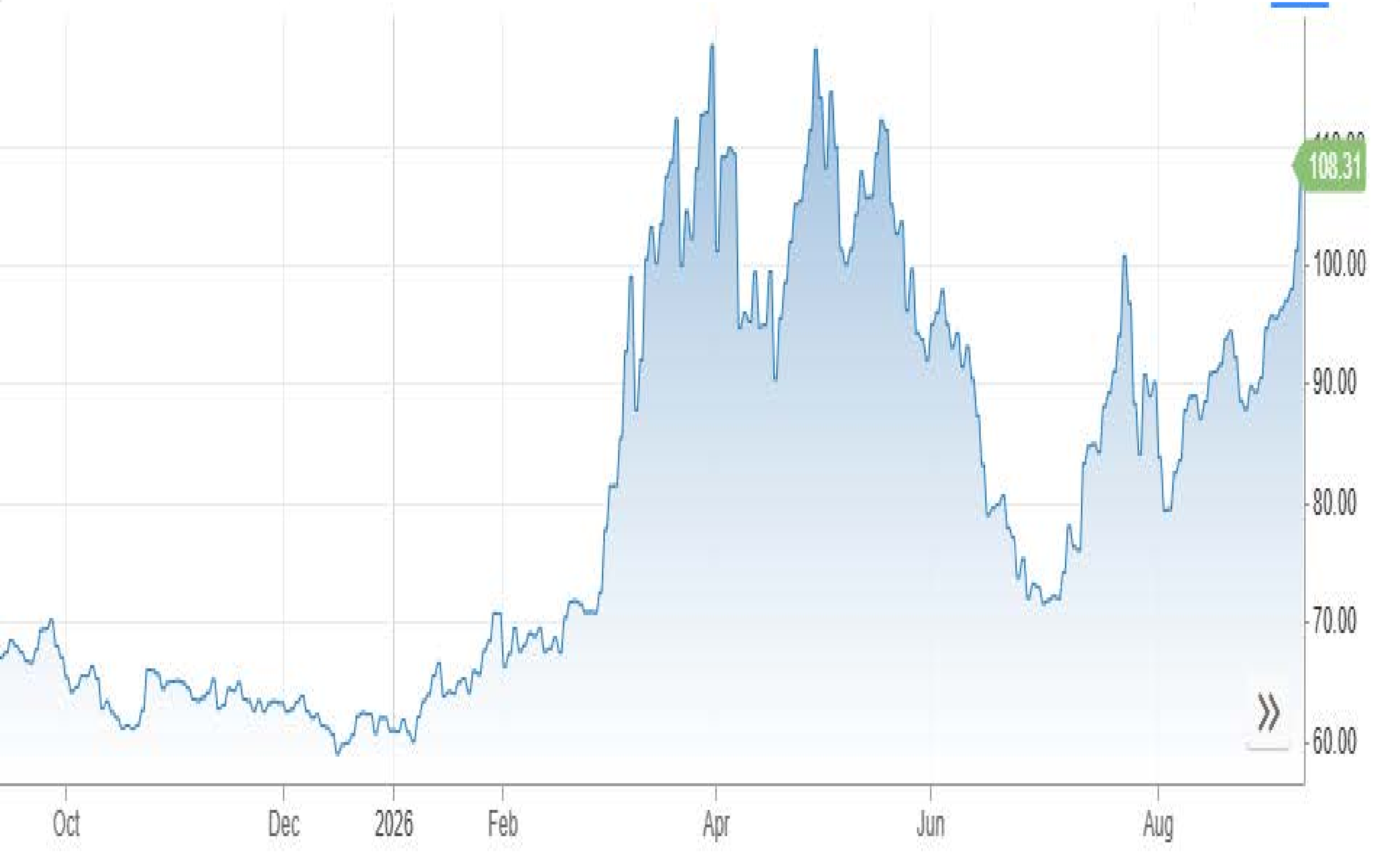

US 10 Yr Bond Yield Spikes

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Strong Domestic GDP Growth

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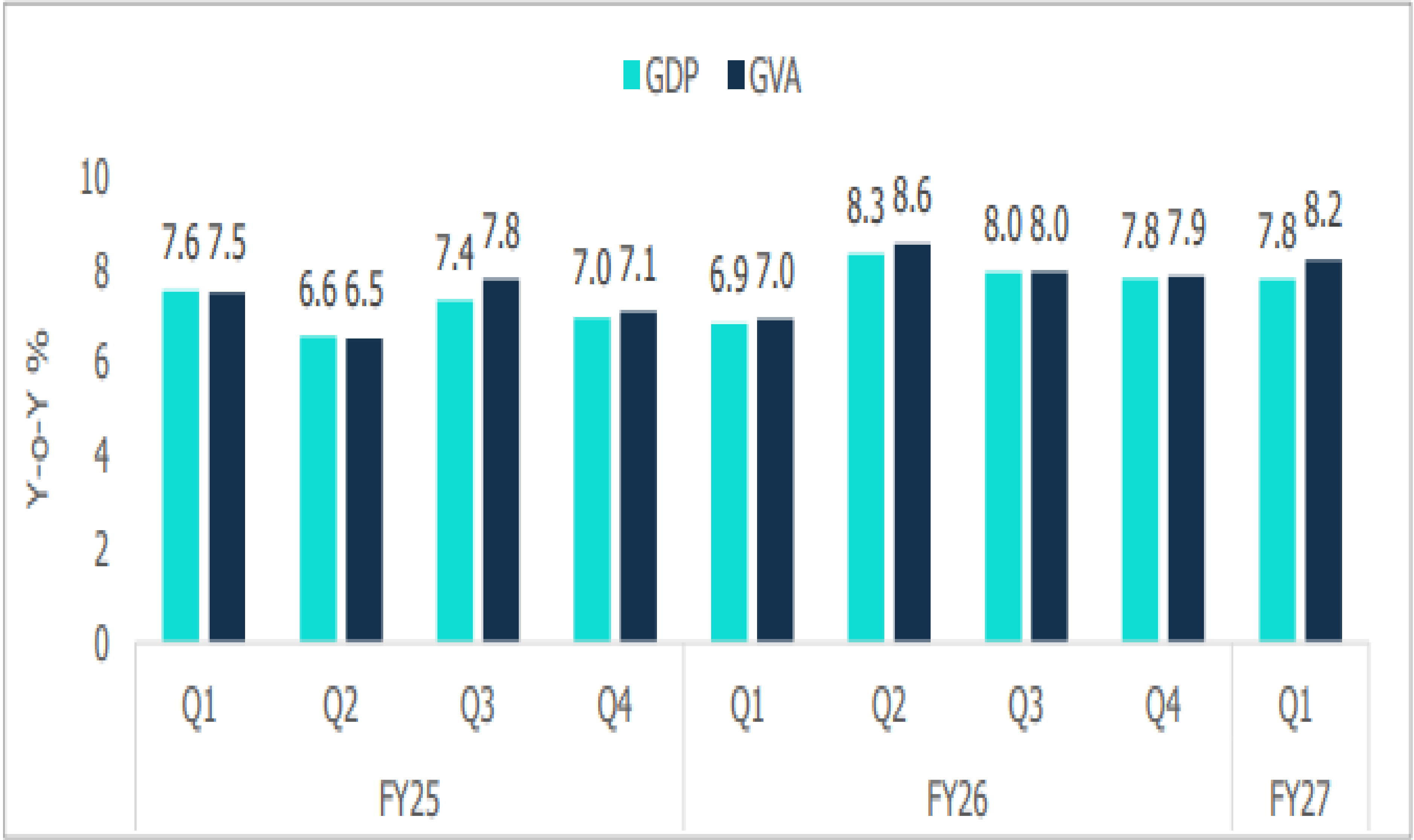

Source: MOSPI & CareEdge

GDP Segment

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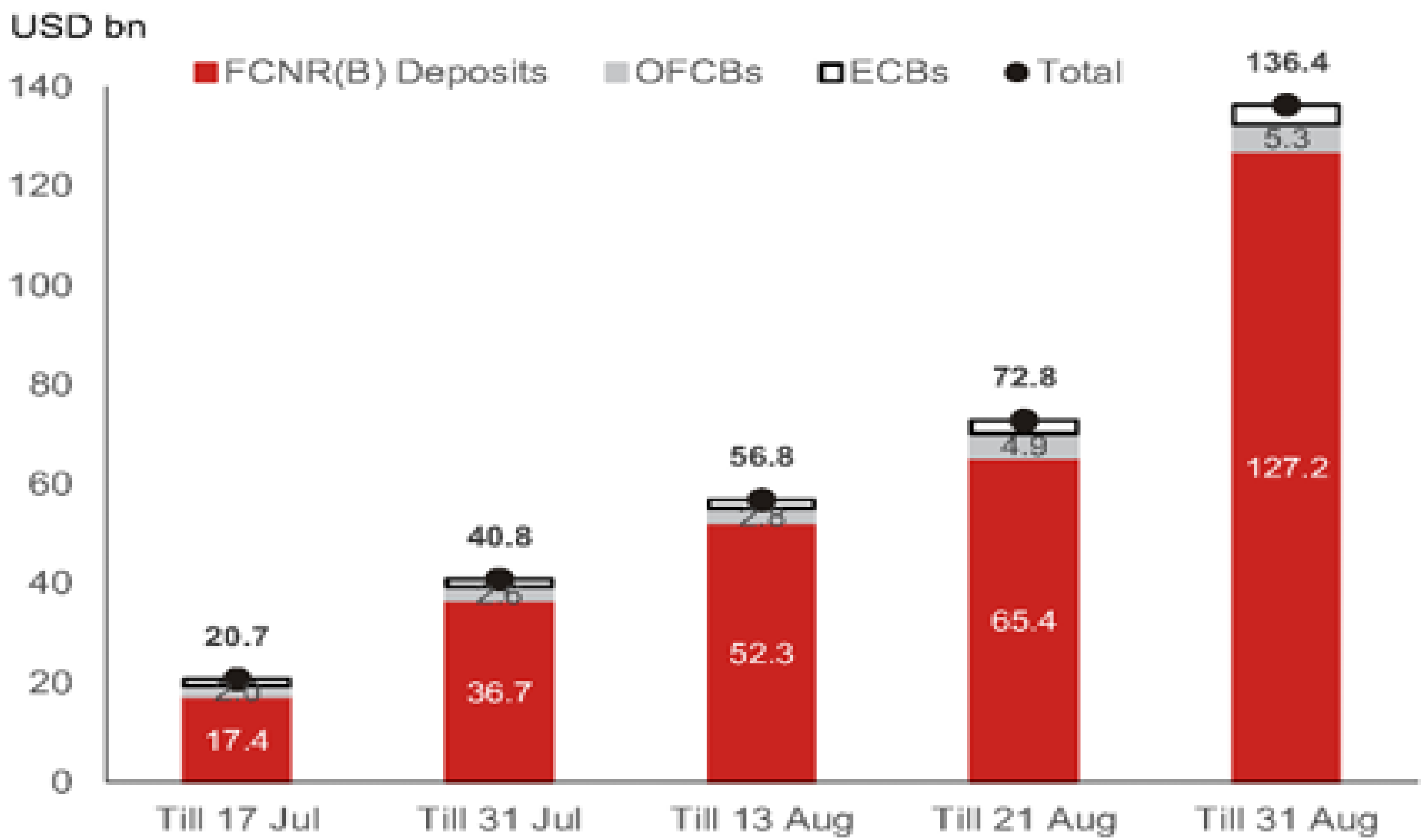
	Q1 FY26	Q2 FY26	Q3 FY26	Q4 FY26	Q1 FY27
Government Final Consumption Expenditure (GFCE)	4.5	6.6	4.6	4.9	4.3
Private Final Consumption Expenditure (PFCE)	6.8	7.2	8.2	7.1	7.1
Gross Fixed Capital Formation (GFCF)	5.8	8.4	8.2	10.8	11.9
Exports	6.0	9.7	5.8	3.7	12.0
Imports	5.3	6.0	7.2	1.9	-1.1
GDP (at constant prices)	6.9	8.3	8.0	7.8	7.8

Source: MOSPI & CareEdge

FCNR Collections will Stablise Rupee

Fig. 1: Cumulative FX inflows mobilised under various schemes (since 8 June)



US $ Vs Rupee

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Strong Auto Sales Continues

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August Sales

Company	% Change YoY
Tata Motors PV	+ 56
Maruti	+ 21
Hyundai	+23
M&M	+50
Tata Motors CV	+49
Ashok Leyland	+43
TVS Motor	+21
Eicher Motor	+23
Bajaj Auto	+28
Hero Moto	+19

Monsoon Update

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- Rainfall Deficit at -14% till date
- Kharif Sowing at 2% lower when compared to last year

Region	Actual (mm)	Normal (mm)	% Departure from LPA
CENTRAL INDIA	807.6	862.9	-6
EAST AND NORTH EAST INDIA	877.8	1162.8	-25
NORTH WEST INDIA	482.6	525.2	-8
SOUTH PENINSULA	434.5	596.5	-27
COUNTRY AS A WHOLE	645.5	754.5	-14

FPI Cash Market Actions

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Period	Net Flows Cr.
Aug 2026	- 7,531
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 8,16,435 Cr.
Around $85 Bn

Events To Watch

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- FPI Activity
- Mega IPO’s
- Geopolitical Tension

Technicals

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NIFTY 50
D
Indicators
Save
NIFTY 50 · 1D · INDICES
O23,270.30 H23,448.10 L23,231.40 C23,398.10 -79.70 (-0.34%)
23,398.10 BUY
0.00
23,398.10 SELL
NIFTY BROKE DOWN UPWARD CHANNEL
S1- 23070 -23000 AS RECENT SWING LOW
26,400.00
26,000.00
25,600.00
25,200.00
24,800.00
24,400.00
24,000.00
23,600.00
23,398.10
23,200.00
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CAPSTOCKS


NIFTY 50
D
Indicators
Save
NIFTY 50 · 1D · INDICES O23,270.30 H23,448.10 L23,231.40 C23,398.10 −79.70 (−0.34%)
23,398.10 BUY
0.00
23,398.10 SELL
NIFTY SWING LOWS BECOME RESISTANCES
R2- 24000 AS NEXT PREVIOUS SWING LOW
R1 - 23600 AS PREVIOUS SWING LOW BECOMES RESISTANCE
S1 - 23000
27,200.00
26,800.00
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25,200.00
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24,400.00
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23,600.00
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CAPSTOCKS


NIFTY 50
D
Indicators
Save
NIFTY 50 · 1D · INDICES
O23,270.30 H23,447.75 L23,232.25 C23,398.10 −79.70 (−0.34%)
23,398.10 BUY
0.00
23,398.10 SELL
Volume 0
NIFTY SUPPORTS & RESISTANCE LEVELS
R2 24000
R1 23600
S1 23070-23000
S2 22800-22850
S3 22550-22600
S1 - 23070 RECENT SWING LOW
S2 - 22800 CHANNEL SUPPORT
S3 - 22600 TRENDLINE SUPPORT SINCE 2023 DEC
R1 - 23600 RECENT SWING LOW BECOMES RESISTANCE
R2 - NEXT SWING LOW BECOMES RESISTANCE
28,000.00
27,500.00
27,000.00
26,500.00
26,000.00
25,500.00
25,000.00
24,500.00
24,000.00
23,398.10
23,000.00
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1d 5d 1m 3m 6m 1yr 5yr All
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Thank You