THE INVESTMENT TRUST OF INDIA
RETAIL BROKING

# ITI Morning Boost

**Sept 04, 2026**

# NIFTY – 23,873.45 (Daily Chart)


•In Thursday's trading session, the Nifty opened with a gap up but failed to sustain its bullish momentum and gradually moved southward, resulting in a gap covering and a negative close.

• On a daily scale, the index has formed a strong bearish candle and continues to trade below the 20 DEMA, indicating that bearish momentum remains intact. The index is also maintaining its bearish structure, forming a pattern of lower lows and lower highs. To signal a meaningful trend reversal, the index needs to decisively breach and sustain above 24,370.

**• For Friday's trading session, 23,850 will act as the initial support level, while on the higher end, 23,940 will act as the initial resistance level.**

# BANK NIFTY – 57,380.60 (Daily Chart)


- In Thursday's trading session, the banking index opened with a huge gap up but failed to sustain its bullish momentum and gradually moved southward. However, the index managed to close on a positive note.
- On a daily scale, the index has formed a bearish candle with a small upper wick, indicating selling pressure at higher levels. The index managed to close above the range support level of 57,000, which is a positive sign. However, the bulls will remain cautious as gap covering is still pending for the gap created on September 3.
- **For Friday's trading session, 57,380 will act as the initial support level, while on the higher end, 57,750 will act as the initial resistance level.**

# RBLBANK CMP- 408.10 ( Daily Chart)

# BUY ABOVE 409 SL 405 TGT 418.

# POWERGRID CMP- 265.60 (Daily Chart) SELL FUT BELOW 267 SL 269.65 TGT 261.

# STOCK'S IN NEWS

**ULTRACEMCO :** Aditya Birla Group has entered India's wires and cables market with an investment of ₹1,800 crore, launching the business under the Ultravolt brand through its cement arm UltraTech Cement.

CMP- 11,275.00
IMPACT- **POSITIVE**

**BHARATFORG :** Auto components major said its wholly owned subsidiary Kalyani Strategic Systems Ltd (KSSL) has partnered with FN Herstal to build small arms and counter-unmanned aerial system (C-UAS) capabilities in India.

CMP- 1,981.00
IMPACT- **POSITIVE**

**CIPLA :** Drug firm announced that its wholly owned subsidiary Invagen Pharmaceuticals Inc has entered into a strategic partnership with Qilu Pharmaceutical Co. Ltd for the exclusive licensing and supply of QL2107, a biosimilar to Keytruda (pembrolizumab), in the United States.

CMP- 1,394.70
IMPACT- **POSITIVE**

**ADANIPORTS :** APSEZ will start operations of a dedicated Empty Container Yard at Mundra Port and SEZ, aimed at streamlining container handling and improving services for shipping lines and customers. The on-site operations are also expected to strengthen safety, security and regulatory compliance while enabling faster turnaround and better utilisation of infrastructure.

CMP- 1,706.50
IMPACT- **POSITIVE**

# ECONOMIC NEWS

- India and Belgium agreed to expand their partnership in defence and trade. Cooperation in defence and security is a key pillar of their relationship. Both nations will enhance military exchanges and training cooperation between them. They also agreed to strengthen intelligence sharing and cooperation against crime. Belgium conveyed solidarity with India in the fight against terrorism.

- India remains the world's fastest-growing major economy, achieving 7.8% growth in Q1 FY27. The finance minister highlighted government focus on capital assets and MSME credit availability. Reforms like the Insolvency and Bankruptcy Code ensure regulatory certainty for businesses. India's investment climate has improved significantly, attracting greater investor interest. These efforts align with the national vision for Viksit Bharat 2047.

- The services sector in India showed an uptick in August, spurred by increased business and consumer demand. However, this expansion was only the second-slowest since March 2022. Meanwhile, manufacturing faced challenges, hitting a five-year low. Composite growth remained steady, as services balanced out manufacturing's dip. Nevertheless, confidence among businesses for the upcoming year remained below typical levels.

## NIFTY50 TOP GAINERS

| Company | Price | Change | %Gain |
|---|---|---|---|
| Adani Ports | 1,706.50 | 33.80 | 2.02 |
| Axis Bank | 1,267.00 | 13.10 | 1.04 |
| HDFC Bank | 706.65 | 5.85 | 0.83 |
| TATA Cons. Prod | 1,019.20 | 7.20 | 0.71 |
| Bharat Elec | 408.60 | 2.85 | 0.70 |

## NIFTY50 TOP LOSERS

| Company | Price | Change | %Gain |
|---|---|---|---|
| Bajaj Auto | 11,920.00 | -210.00 | -1.73 |
| Tech Mahindra | 1,598.00 | -25.00 | -1.54 |
| Trent | 2,815.60 | -36.70 | -1.29 |
| Cipla | 1,394.70 | -18.10 | -1.28 |
| M&M | 3,150.00 | -40.00 | -1.25 |

## NIFTY200 TOP GAINERS

| Company | Price | Change | %Gain |
|---|---|---|---|
| Solar Ind | 21,500.00 | 900 | 4.37 |
| BSE Limited | 3,306.10 | 138.1 | 4.36 |
| SBI Card | 661 | 25.85 | 4.07 |
| GMR Airports | 96.87 | 2.88 | 3.06 |
| KEI Industries | 5,327.00 | 157 | 3.04 |

## NIFTY200 TOP LOSERS

| Company | Price | Change | %Gain |
|---|---|---|---|
| MCX India | 3,170.20 | -115.8 | -3.52 |
| Godrej Consumer | 880 | -25 | -2.76 |
| Bharat Forge | 1,981.00 | -50.8 | -2.5 |
| Federal Bank | 344.6 | -8.75 | -2.48 |
| APL Apollo | 2,159.40 | -50.6 | -2.29 |

## OPEN INTEREST GAINERS

| Symbol | Price | Change | Change% | Open Interest ('000) | Open Int Chg % |
|---|---|---|---|---|---|
| MAHABANK | 86.90 | 4.36 | 5.29% | 23,166.00 | 22.31% |
| GODREJCP | 876.40 | -29.90 | -3.30% | 15,236.00 | 21.14% |
| SWIGGY | 272.05 | 5.20 | 1.95% | 88,587.30 | 15.75% |
| ATHERENERG | 1,636.00 | -22.40 | -1.35% | 2,980.90 | 14.14% |
| KAYNES | 3,456.90 | -114.10 | -3.20% | 4,081 | 8.00% |

## OPEN INTEREST LOSERS

| Symbol | Price | Change | Change% | Open Interest ('000) | Open Int Chg % |
|---|---|---|---|---|---|
| NHPC | 76.61 | 0.52 | 0.68% | 1,28,220.60 | -3.20% |
| YESBANK | 22.63 | 0.48 | 2.17% | 10,01,606.60 | -2.75% |
| ASTRAL | 1,501.80 | 6.60 | 0.44% | 5,755.40 | -1.98% |
| BANDHANBNK | 165.67 | 2.72 | 1.67% | 1,10,552.40 | -1.93% |
| SRF | 2,625.30 | 24.90 | 0.96% | 4,203 | -1.85% |

## INDEX HIGHEST OI

| F&O Ban list |
|---|
| LICHSGFIN |
| SAIL |
| INOXWIND |
| KAYNES |

| Monthly exp | Indices | Highest CE strike | Highest PE strike | PCR OI |
|---|---|---|---|---|
| 29/09/26 | NIFTY | 25,000 | 24,000 | 1.13 |
| 29/09/26 | BANKNIFTY | 57,500 | 57,500 | 1.04 |

# FII & DII TRADING ACTIVITY CASH

| | FII Rs Crores | | | DII Rs Crores | | |
|---|---|---|---|---|---|---|
| Date | Gross Purchase | Gross Sales | Net Purchase / Sales | Gross Purchase | Gross Sales | Net Purchase / Sales |
| Month till date | 58,119.45 | 52,633.57 | 5,485.88 | 50,339.03 | 40,701.65 | 9,637.38 |
| 03-Sep-26 | 13,596.04 | 15,941.91 | -2,345.87 | 17,063.65 | 12,086.19 | 4,977.46 |
| 02-Sep-26 | 26,715.88 | 20,027.51 | 6,688.37 | 17,639.89 | 14,826.91 | 2,812.98 |
| 01-Sep-26 | 17,807.53 | 16,664.15 | 1,143.38 | 15,635.49 | 13,788.55 | 1,846.94 |

# FII & DII TRADING ACTIVITY STOCK F&O

| | FII Stock Fut | | | FII Stock Opt | | |
|---|---|---|---|---|---|---|
| Date | Gross Purchase | Gross Sales | Net Purchase / Sales | Gross Purchase | Gross Sales | Net Purchase / Sales |
| Month till date | 48,434.43 | 46,034.75 | 2,399.68 | 90,475.26 | 90,833.25 | -357.99 |
| 03-Sep-26 | 14,843.45 | 13,722.56 | 1,120.89 | 27,894.48 | 27,673.56 | 220.92 |
| 02-Sep-26 | 19,128.66 | 16,524.53 | 2,604.13 | 32,235.31 | 32,772.59 | -537.28 |
| 01-Sep-26 | 14,462.32 | 15,787.66 | -1,325.34 | 30,345.47 | 30,387.10 | -41.63 |

# TOP SECTORS PERFORMANCE OF THE DAY

| Name | Daily (%) | 1 Week (%) | 1 Month (%) | 3 Months (%) | 6 Months (%) | 1 Year (%) |
|---|---|---|---|---|---|---|
| Air Transport Service | 2.96 | -0.48 | -3.32 | 7.73 | 25.07 | -11.83 |
| Crude Oil & Natural Gas | 2.51 | 2.78 | 9.56 | 11.23 | 27.56 | 13.24 |
| Ship Building | 2.29 | 2.36 | 5.09 | 28.53 | 35.71 | 217.71 |
| Paper | 2.2 | -1.14 | -4.63 | -0.69 | 0.74 | -20.6 |
| Power Infrastructure | 1.81 | -3.95 | -14.89 | -21.43 | -10.54 | -36.09 |

*Data in above table is based on previous day closing bases

# UPCOMING ECONOMIC EVENTS

| Friday, 4 September 2026 | Country | Event’s | Forecast | | Previous |
|---|---|---|---|---|---|
| 17:00 | IN | FX Reserves, USD | | | 729.33B |
| 18:00 | US | Average Hourly Earnings (MoM) (Aug) | 0.3% | | 0.1% |
| 18:00 | US | Nonfarm Payrolls (Aug) | 58K | | -23K |
| 18:00 | US | Unemployment Rate (Aug) | 4.1% | | 4.1% |
| Tuesday, 8 September 2026 | | | | | |
| 05:20 | JP | GDP (QoQ) (Q2) | 0.3% | | 0.5% |
| Thursday, 10 September 2026 | | | | | |
| 11:30 | DE | German CPI (MoM) (Aug) | 0.2% | | 0.8% |
| 17:45 | EU | Deposit Facility Rate (Sep) | | | 2.25% |
| 17:45 | EU | ECB Interest Rate Decision (Sep) | | | 2.40% |
| 18:00 | US | PPI (MoM) (Aug) | | | |
| 18:00 | US | Initial Jobless Claims | | | |

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