PROGRESSIVE'S EVENING STROLL DATE: 12 August, 2026

Market Snapshot:

A bearish follow-up action was seen post the tepid start, starting with the IT sector. As the day progressed, FMCG and other heavyweights also started to correct sharply and dragged the Index much lower. However, a sharp recovery in the last session supported the Index to trim the majority of its losses to settle the trade at 24,435.95, down by 35.75 points. Among the sectors, PSU Banks and Media advanced the most, whereas IT and FMCG were the laggards. From the Broader markets, Midcaps outperformed, while Smallcaps moved in tandem with the Frontline Index.

HOW THE DAY TRENDED

INDICES

Index	Close	Points	%Chg.
Sensex	77966.35	(187.90)	**(0.24)**
Nifty50	24435.95	(35.75)	**(0.15)**
Nifty Midcap 100	64024.40	180.55	**0.28**
Nifty Small Cap 100	19821.65	(35.50)	**(0.18)**

SECTORAL GAINERS / LOSERS

Sectors	Close	Points	%Chg.
NIFTY PSU BANK	8817.50	177.25	**2.05**
NIFTY MEDIA	1569.10	16.35	**1.05**
NIFTY FMCG	48429.35	(358.50)	**(0.73)**
NIFTY IT	31332.55	(490.60)	**(1.54)**

NIFTY TOP GAINERS / LOSERS

Gainers	CMP (Rs)	%Chg.	Losers	CMP (Rs)	%Chg.
HINDALCO	1078.50	**2.80**	TCS	2349.70	**(3.93)**
BHARTI AIRTEL	1945.00	**1.56**	MAX HEALTHCARE	1007.50	**(3.12)**
SBIN	1082.00	**1.50**	APOLLO HOSPITAL	8597.00	**(1.75)**
JIO FIN	256.05	**1.31**	M&M	3403.60	**(1.63)**

INDICES LEVELS FOR August 13, 2026

Nifty (future)

Resistance	24600
Support	24360

Bank Nifty (future)

Resistance	58430
Support	57570

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KEY TAKEAWAYS OF THE DAY

♦ **Glenmark settles Humana antitrust lawsuit for USD15.28mn:**

Glenmark Pharmaceuticals Ltd settled antitrust lawsuits with Humana for USD15.28mn, resolving claims dating back to 2016 regarding generic drug pricing. The company noted the amount is fully provided for in its books, ensuring no significant impact on its current financial position.

♦ **HG Infra Engineering wins Rs241cr work order from Rajasthan Government for ITI cluster O&M:**

HG Infra Engineering has received a confirmed work order valued at Rs241.0cr from the Department of Skill, Employment & Entrepreneurship, Government of Rajasthan. The contract pertains to the operation and management of the ITI Bhiwadi Cluster under Component-I of PM-SETU (Pradhan Mantri Skilling and Employability Transformation through Upgraded ITIs) for a period of 10 years. This is a Type A confirmed order, meaning the value is firm and executable upon issuance of the letter of award or work order.

♦ **L&T transfers data center & cloud biz to Vyoma.AI for Rs1400cr:**

L&T has executed a Business Transfer Agreement with its subsidiary Vyoma.AI for the transfer of its data centre and cloud services business, on a going-concern basis through a slump sale, to Vyoma for Rs1,400cr.

♦ **BEML bags Rs184cr order from HAL:**

BEML announced that it has secured an order worth Rs184.25cr from Hindustan Aeronautics (HAL) for the manufacture and supply of Light Combat Helicopter (LCH) fuselage aerostructures.

♦ **Zydus Lifesciences subsidiary Sentynl Therapeutics and Mereo Biopharma announce option and license agreement:**

The company's subsidiary, Sentynl Therapeutics, and Mereo BioPharma Group plc have entered into an option and licence agreement for the US commercialisation and global manufacturing rights to Alvelestat for AATD-LD. Alvelestat is a neutrophil elastase inhibitor being prepared for Phase 3 trials and, if approved, would be the first oral treatment for this rare, progressive genetic lung disease. The option and licence agreement grants Sentynl the exclusive right to acquire a licence to commercial rights in the rest of the world.

Source: Media Reports

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