END DAY COMMENTARY

7th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,285.07	78,461.16	78,664.92	78,031.04	78,180.72	-104.35	-0.13
NIFTY	24,430.35	24,464.45	24,530.90	24,348.95	24,398.70	-31.65	-0.13

INDICES ERASED ALL INTRADAY GAINS AND ENDED LOWER

The 30-share BSE Sensex was down by 104.35 points or 0.13% to settle at 78,180.72 and the Nifty was down by 31.65 points or 0.13 % to settle at 24,398.70. The BSE Small Cap 250 was down by 0.76% and BSE 500 was down by 0.27%. On the sectoral front, IT, Consumer Durables and Oil & Gas were gaining indices. On the flip side, Healthcare, Capital Goods, Bank, Realty, Auto and FMCG were the losing indices. HCL Tech, Tech Mahindra, Infosys, Titan and Eternal were gainers on the Sensex; on the flip side, Trent, Adani Ports, BEL, Larsen & Toubro and Reliance were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a green note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,170.0	1,134.2	3.16
TECHM	1,447.0	1,406.5	2.88
INFY	1,071.9	1,042.2	2.85
SBILIFE	1,835.0	1,787.7	2.65
TITAN	4,591.2	4,484.4	2.38

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TRENT	2,921.0	3,343.8	-12.64
ADANIENT	3,109.9	3,206.6	-3.02
BEL	417.40	425.55	-1.92
ADANIPORTS	1,831.0	1,864.4	-1.79
MAXHEALTH	1,115.3	1,132.5	-1.52

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	57611729	827.50	4,805.2
TRENT	9059505	2,921.0	2,704.3
ICICIBANK	15664178	1,412.0	2,226.4
INFY	18866296	1,071.9	2,027.9
RELIANCE	14335554	1,305.0	1,883.9

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	57611729	827.50	4,805.2
ETERNAL	45305615	289.30	1,307.2
KOTAKBANK	23216875	382.15	884.86
JIOFIN	23069644	243.00	560.71
TATASTEEL	22805982	189.60	432.99

Indian equity benchmarks ended lower on Tuesday, with the Sensex and Nifty snapping their four-day winning streak ahead of the weekly expiry of Nifty F&O contracts. After a cautious start, the indices gained momentum in early trade, supported by continued inflows by foreign institutional investors (FIIs). However, markets erased their gains in the afternoon session and settled in negative territory amid profit booking, as investors turned cautious following fresh strikes between the US and Iran.

India-EU FTA legal scrubbing likely to be completed in 15-20 days: Traders took note of report that Commerce and Industry Minister Piyush Goyal said that India and the European Union (EU) are expected to complete the legal scrubbing of the free trade agreement (FTA) in the next 15-20 days.

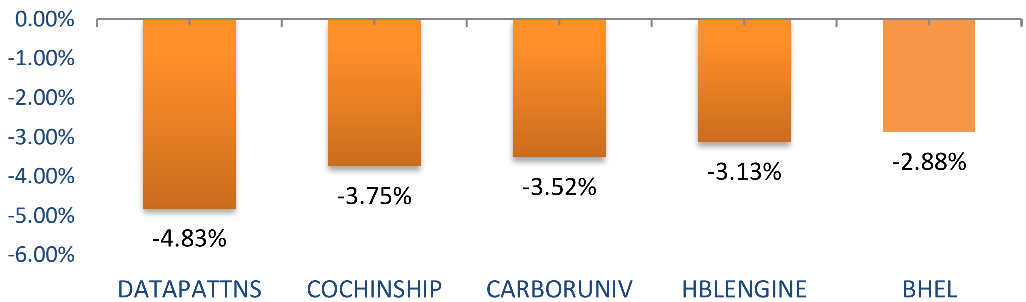
On the global front: European markets were trading mostly higher, after Germany's industrial production grew more than expected in May. Asian markets closed mostly in red despite Singapore's retail sales expanded for the fourth straight month in May.

Source: AceEquity

NEWS BULLETIN

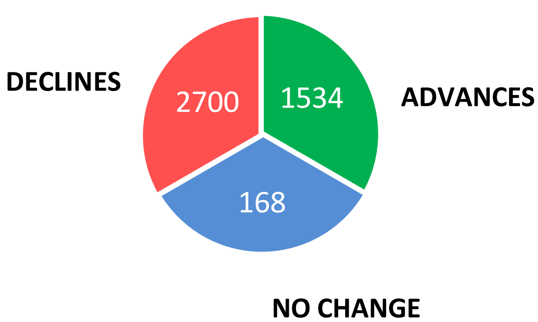
- **Bharat Heavy Electricals (BHEL)** has signed Strategic Collaboration Agreement (SCA) with thyssenkrup nucera India for Alkaline Electrolyser System for Green Hydrogen projects.
- **Indian Hotels Company** has signed 20 hotels in the first quarter of FY2027 (Q1FY27) expanding its portfolio to 645 hotels, including 263 hotels in the pipeline. During the quarter, it opened 11 new hotels across its brandscape.
- **Texmaco Rail & Engineering** has received Letter of Award (LoA) from Central Warehousing Corporation for manufacture and supply of BLSS rakes along with Brake Van. Broad consideration or size of the order(s)/contract(s) is Rs 70.72 crore (including taxes). The said order is expected to be completed within 180 days from the date of issue of LoA.

MARKET DRIVING SECTOR : CAPITAL GOODS



S&P BSE: CAPITAL GOODS
CLOSING: 79,681.39
CHANGE: -1,378.14
CHANGE: -1.73%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
1.09

PE MULTIPLE OF NIFTY
21.03

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