END DAY COMMENTARY

08th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,180.72	77,816.45	77,851.18	76,259.03	76,503.60	-1,677.12	-2.15
NIFTY	24,398.70	24,259.55	24,300.00	23,805.20	23,882.05	-516.65	-2.12

INDICES TUMBLED AMID RENEWED TENSIONS IN WEST ASIA

The 30-share BSE Sensex was down by 1,677.12 points or 2.15% to settle at 76,503.60 and the Nifty was down by 516.65 points or 2.12% to settle at 23,882.05. The BSE Small Cap 250 was down by 2% and BSE 500 was down by 1.97%. On the sectoral front, there was no gaining indices. On the flip side, IT, Auto, Oil & Gas, Metal, Banks, FMCG, Healthcare, Consumer Durables, Realty and Capital Goods were losing indices. There were no gainers on the Sensex; on the flip side, Indigo, Maruti, Hindustan Unilever, Bajaj Finance and Kotak Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a negative note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ONGC	247.00	244.18	1.15
BAJAJ-AUTO	10,175.00	10,109.50	0.65
HINDALCO	973.55	969.50	0.42
COALINDIA	430.65	428.95	0.40

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INDIGO	5,120.00	5,395.00	-5.10
JIOFIN	230.86	243.07	-5.02
SHRIRAMFIN	1,015.00	1,066.80	-4.86
MARUTI	13,974.00	14,538.00	-3.88
HINDUNILVR	2,134.60	2,208.80	-3.36

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	38754632	809.30	3,185.40
RELIANCE	19960868	1,274.90	2,563.59
ETERNAL	58555994	287.30	1,698.71
ICICIBANK	10573142	1,383.10	1,476.90
SBIN	14141694	1,019.80	1,451.15

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	58555994	287.30	1,698.7
HDFCBANK	38754632	809.30	3,185.4
JIOFIN	37304617	230.86	869.98
ONGC	24753835	247.00	607.76
KOTAKBANK	22517529	370.45	841.23

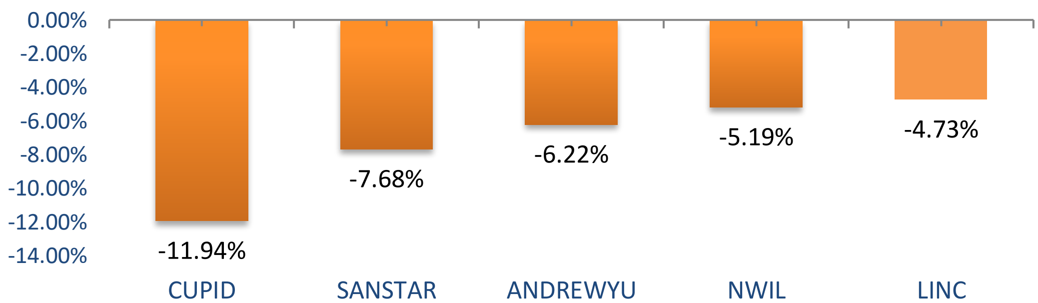
Indian equity benchmarks closed sharply lower on Wednesday, with both the Nifty and Sensex tumbling by over 2%, amid renewed tensions in West Asia after U.S. President Donald Trump declared that the Iran ceasefire is 'over'. Markets made a negative start and remained under pressure throughout the session, as investors stayed focused on the upcoming earnings season. In the final hours of trade, markets witnessed heavy selling pressure amid broad-based selling across sectors. Crude oil prices traded higher with gains of around 6% as escalating tensions in the Middle East heightened concerns over potential supply disruptions after the US President Donald Trump said that the ceasefire is over with Iran. Traders overlooked the report released by United Nations Trade and Development (UNCTAD) stating that Foreign Direct Investment (FDI) inflows to India increased by 44 per cent in 2025 to $39 billion. Traders took note of the Commerce Ministry's statement that India and the 11-nation ASEAN bloc took stock of the progress of talks to review the free trade agreement in goods between the two sides.

On the global front, European markets were trading in red, as renewed Middle East tensions fueled concerns over inflation and the outlook for central bank policy. Asian markets closed mixed tracking negative cues from Wall Street overnight.
Source: AceEquity

NEWS BULLETIN

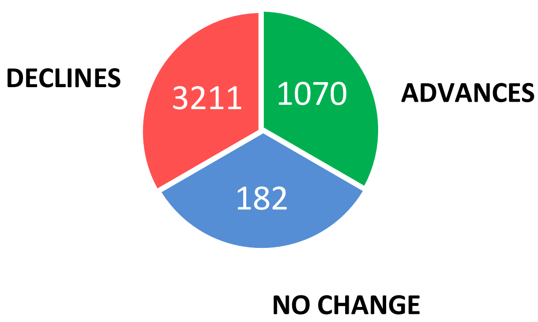
- **Atishay** has secured a new work order worth Rs 47.06 lakh (inclusive of all applicable duties and taxes) from Bharat Sanchar Nigam, Bhopal. The scope of the work order includes the supply, installation and commissioning of Wi-Fi, Network and comprehensive AMC work at IIFM, Bhopal.
- **3i Infotech's** step down wholly owned subsidiary -- 3i Infotech Software Solutions L.L.C. has received order from Vedant Consultancy FZ LLC, UAE, for providing IT consulting services in the fields of Robotic Process Automation (RPA), Artificial Intelligence, Machine Learning and Robotics. The engagement is for a period of 12 months from May 1, 2026 to April 30, 2027. The total value of the order is 17,651,620 United Arab Emirates Dirham (AED) (Rs 45.85 crore), exclusive of applicable taxes.

MARKET DRIVING SECTOR : FMCG



S&P BSE: FMCG
CLOSING: 18,220.53
CHANGE: - 474.15
CHANGE: - 2.54%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.81

PE MULTIPLE OF NIFTY
20.60

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