END DAY COMMENTARY

09th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,503.60	76,576.14	77,326.65	76,576.14	76,741.82	+238.22	+0.31
NIFTY	23,882.05	23,928.95	24,134.70	23,925.70	23,962.80	+80.75	+0.34

INDICES CLOSED THE DAY WITH MODEST GAINS

The 30-share BSE Sensex was up by 238.22 points or 0.31% to settle at 76,741.82 and the Nifty was up by 80.75 points or 0.34% to settle at 23,962.80. The BSE Small Cap 250 was up by 1.69% and BSE 500 was up by 0.74%. On the sectoral front, Oil & Gas, Metal, Banks, FMCG, Healthcare, Consumer Durables, Capital Goods and Realty were gaining indices. On the flip side, IT and Auto were losing indices. Sunpharma, Bharti Airtel, Bajaj Finserv, Indigo and Eternal were gainers on the Sensex; on the flip side, Infosys, Maruti, NTPC, Axis Bank and Bajaj Finance were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SUNPHARMA	1,940.7	1,888.2	2.78
BHARTIARTL	1,935.1	1,888.1	2.49
BAJAJFINSV	1,899.0	1,854.9	2.38
INDIGO	5,230.5	5,124.0	2.08
ETERNAL	292.45	286.70	2.01

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,271.2	1,349.0	-5.77
MARUTI	13,709	13,951	-1.73
ONGC	243.49	247.00	-1.42
INFY	1,055.3	1,069.3	-1.31
NTPC	344.45	348.70	-1.22

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	39891798	817.00	3,265.66
BHARTIARTL	11145066	1,935.1	2,161.18
LT	5117653	3,883.0	2,004.49
ICICIBANK	13948838	1,384.0	1,934.68
RELIANCE	14651963	1,280.9	1,885.02

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	49865056	292.45	1,467.7
HDFCBANK	39891798	817.00	3,265.6
KOTAKBANK	30720415	377.30	1,146.6
TATASTEEL	21203724	187.81	398.25
NTPC	17821421	344.45	616.32

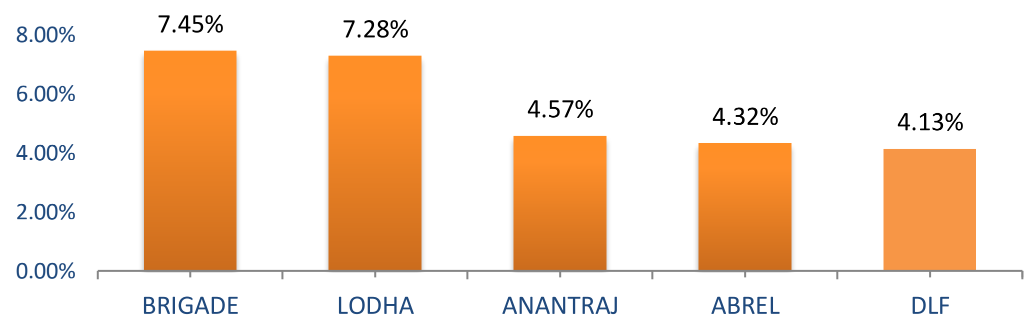
Indian equity benchmarks staged a strong recovery on Thursday after witnessing a sharp correction in the previous session, aided by positive global cues and buying across most sectors. The Nifty reclaimed the 23,950 level as investor sentiment improved following US President Donald Trump's remarks indicating that the possibility of another conflict with Iran was remote. Market confidence was further supported by fresh foreign institutional investor (FII) inflows, a firm rupee, and expectations of a healthy start to the Q1 earnings season. The broader market outpaced the frontline indices, with PSU banking and consumer durable stocks leading the rally, while weakness persisted in the IT and automobile sectors.

On the global front, Global markets ended mostly higher as softer-than-expected Chinese inflation data strengthened hopes of further policy support from Beijing. Investor sentiment also improved after US President Donald Trump downplayed the likelihood of a renewed conflict with Iran, although geopolitical tensions remained elevated following fresh US strikes on Iranian targets. Overnight, Wall Street closed lower as profit booking in AI and technology stocks weighed on sentiment alongside higher oil prices.

NEWS BULLETIN

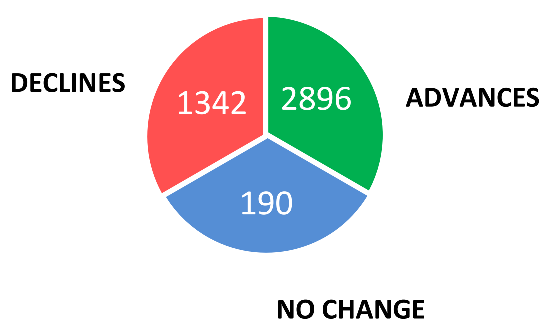
- **Premier Energies** rallied 4.19% after inaugurating its 5.6 GW solar module manufacturing facility at Seetharampur, Telangana. The company also broke ground for a 6 GWh Battery Energy Storage System (BESS) facility and an 18,000 MT per annum aluminium frames plant.
- **Dr Reddy's Laboratories** tumbled 5.85% after the company said commercial supplies of certain batches of its semaglutide product will be delayed following a quality-related issue involving the active pharmaceutical ingredient (API). Semaglutide is widely used for the treatment of type 2 diabetes and obesity.
- **IRB Infrastructure Developers** reported an approximately 28% year-on-year (YoY) increase in toll revenue to Rs 808 crore in June 2026.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 7,084.47
CHANGE: + 252.90
CHANGE: + 3.70%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS