WEEKLY COMMENTARY

11 JULY 2026

Hem Securities
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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,763.91	77,940.90	78,664.92	76,259.03	77,569.39	-194.52	-0.25
NIFTY 50	24,270.85	24,306.85	24,530.90	23,805.20	24,206.90	-63.95	-0.26

MARKETS END LOWER AFTER A VOLATILE WEEK

Indian equity benchmark ended on a red note in the week ended 11 July, 2026. Key indices were positive in three out of five sessions of the week. The S&P BSE Sensex was down by 194.52 points or 0.25% to settle at 77,569.39 in the week ended 11 July, 2026. The CNX Nifty was down by 63.95 points or 0.26% to settle at 24,206.90. The BSE 500 index was up by 74.65 or 0.20% to settle at 36,506.10. The BSE Small-Cap index was up by 33.12 points or 0.47% to settle at 7,153.50.

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SBI LIFE	1,862.9	1,788.7	4.15
BAJAJ AUTO	10,156.0	9,785.5	3.79
TECH MAHINDRA	1,454.8	1,410.1	3.17
ONGC LTD	244.96	237.84	2.99
HDFC BANK	824.95	801.05	2.98

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TRENT LTD	2,902.8	3,340.6	-13.11
DR REDDY`S LAB	1,244.3	1,374.1	-9.45
KOTAK BANK	377.60	396.75	-4.83
MAX HEALTHCARE	1,108.1	1,153.4	-3.93
MARUTI SUZUKI	13,854.0	14,366.0	-3.56

Most Active (by value)

Name	Avg Value	Pr.	Qty
HDFC BANK	18,401.1	824.95	2230572.80
RELIANCE IND	8,496.9	1,307.8	649716.28
ICICI BANK	8,253.4	1,401.2	589027.52
BHARTI AIRTEL	6,195.6	1,920.4	322623.88
INFOSYS LTD	6,002.0	1,068.0	561988.64

Most Active (by volume)

Name	Avg Value	Pr.	Qty
HDFC BANK	18,401.1	824.95	2230572.80
ETERNAL LTD	5,771.2	289.65	1992486.56
KOTAK BANK	4,761.1	377.60	1260886.40
JIO FINANCIAL	2,645.5	241.96	1093369.68
TATA STEEL	1,901.1	191.19	994388.72

INSTITUTIONAL NET POSITION

FIIs Cash	+4,669.88
FIIs Index Future	-585.61
FIIs Stock Future	+5,594.98
DIIs Cash	+8,275.62

On Monday, 6 July, 2026, the benchmark indices ended higher aided by widespread buying interest. The S&P BSE Sensex jumped 521.16 points or 0.67% to 78,285.07. On Tuesday, 7 July, 2026, the benchmark indices retreated, with weak global markets prompting profit booking. The S&P BSE Sensex declined 104.35 points or 0.13% to 78,180.72. On Wednesday, 8 July, 2026, indices fell for a second straight session. The S&P BSE Sensex tanked 1,677.12 points or 2.15% to 76,503.60. On Thursday, 9 July, 2026, the benchmark indices rebounded. The S&P BSE Sensex surged 238.22 points or 0.31% to 76,741.82. On Friday, 10 July, 2026, The key domestic indices rallied sharply. The S&P BSE Sensex jumped 827.57 points or 1.08% to 77,569.39.

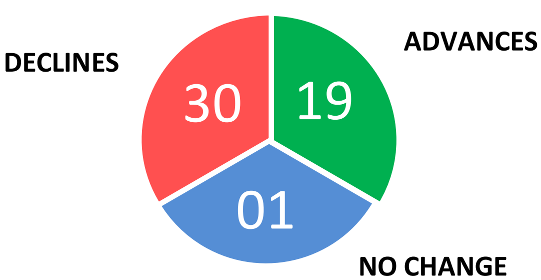
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended the week in the red, snapping a four-week winning streak, as renewed geopolitical tensions in West Asia kept investors cautious. Despite a recovery in the latter half of the week, markets closed lower overall, while broader indices outperformed the benchmark gauges. Going forward, market participants will closely watch Q1 FY27 earnings, management commentary, developments in the U.S.-Iran conflict, and the progress of the monsoon for further direction.

MARKET WATCH- COMING WEEK

Indian equities are expected to trade with a cautious-to-positive bias, supported by resilient domestic fundamentals despite elevated geopolitical risks. Investors will closely track Q1 FY27 earnings, India’s CPI and WPI inflation data, developments in the U.S.–Iran conflict, monsoon progress, and key macroeconomic releases from the U.S. and China for further market direction.

NIFTY MARKET BREADTH (W) - NEGATIVE

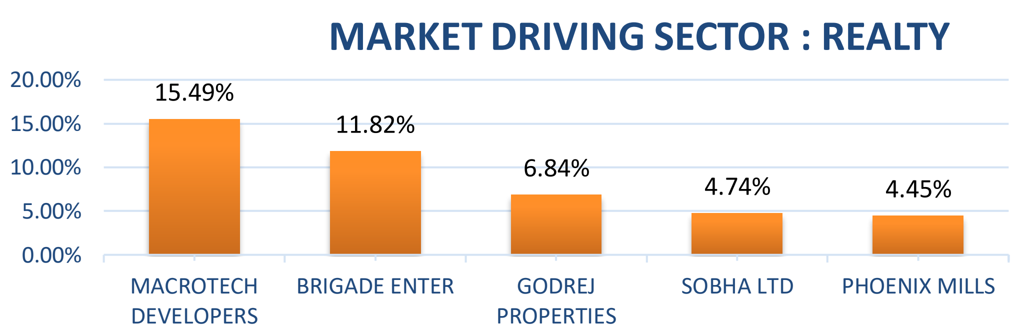


RATIO ANALYSIS

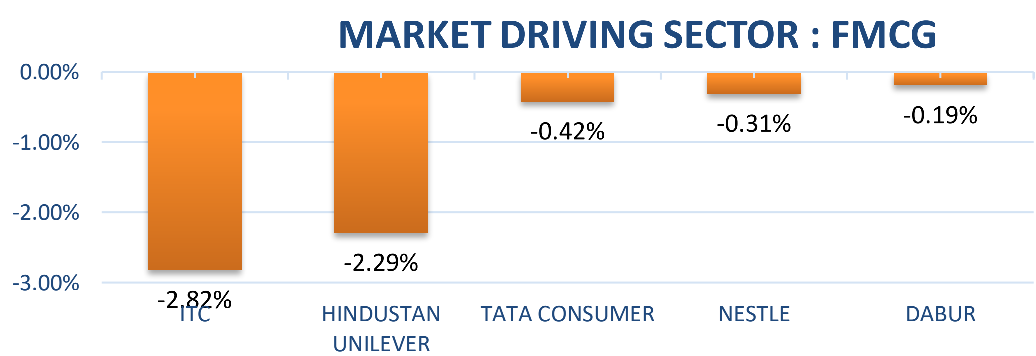
PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.25	20.87

NEWS BULLETIN

- **RailTel Corporation of India** has received a work order from Information Technology and Electronics Department, Uttar Pradesh. The size of order as per work order is Rs 18.53 crore (Including Tax). The order is to be executed by November 17, 2027.
- **HFCL** has secured export order worth around $51.98 million (equivalent to around Rs 495.80 crore) for the supply of optical fiber cable-based data centre connectivity solutions, through its overseas wholly owned material subsidiary, from a renowned international customer. The order is to be executed by December 2026.
- **Bank of Maharashtra** has reported a 26.84% rise in its standalone net profit at Rs 2,020.19 crore for the quarter ended June 30, 2026, as compared to Rs 1,592.76 crore for the same quarter in the previous year. Total income of bank increased by 15.03% to Rs 9,063.29 crore for Q1FY27 as compared to Rs 7,878.82 crore for the corresponding quarter of the previous year.



NIFTY REALTY
CLOSING: 938.60
CHANGE: +47.80
CHANGE: +5.37%



NIFTY FMCG
CLOSING: 49,310.60
CHANGE: -785.80
CHANGE: -1.57%

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