END DAY COMMENTARY

13th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,569.39	76,963.35	77,789.29	76,857.43	77,616.40	+47.01	+0.06
NIFTY	24,206.90	24,039.40	24,259.80	24,000.20	24,211.00	+4.10	+0.02

INDICES ENDED THE DAY ON FLAT NOTE

The 30-share BSE Sensex was up by 47.01 points or 0.06% to settle at 77,616.40 and the Nifty was up by 4.10 points or 0.02 % to settle at 24,211.00. The BSE Small Cap 250 was up by 0.25% and BSE 500 was up by 0.01%. On the sectoral front, IT, Bank, Consumer Durables, Auto and Oil & Gas were gaining indices. On the flip side, Healthcare, Capital Goods, Realty, and FMCG were the losing indices. TCS, HCL Tech, Tech Mahindra, Infosys, Titan and NTPC were gainers on the Sensex; on the flip side, Tata Steel, Eternal, Indigo, Maruti and Ultra Tech were the top losers on the Sensex. On global front, Asian markets shut the day on a positive note and European indices are trading on a green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TCS	2,182.9	2,069.0	5.51
HCLTECH	1,224.0	1,164.1	5.15
INFY	1,102.6	1,068.0	3.24
TECHM	1,502.0	1,454.8	3.24
BAJAJ-AUTO	10,410.0	10,156.0	2.50

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
GRASIM	3,126.0	3,213.6	-2.73
TATASTEEL	187.18	191.19	-2.10
NESTLEIND	1,432.0	1,455.2	-1.59
ETERNAL	285.25	289.65	-1.52
INDIGO	5,235.0	5,312.0	-1.45

Most Active (by value)

Name	Qty	Pr.	Value CR
TCS	12382622	2,182.9	2,678.2
INFY	20994760	1,102.6	2,300.1
HDFCBANK	21741736	817.50	1,777.8
BHARTIARTL	7862506	1,903.6	1,498.1
ICICIBANK	10091437	1,407.8	1,416.1

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	47597415	187.18	889.64
WIPRO	22417855	178.41	399.24
HDFCBANK	21741736	817.50	1,777.8
INFY	20994760	1,102.6	2,300.1
ETERNAL	14808761	285.25	424.06

Benchmark indices recovered from early losses to end marginally higher on Monday, supported by strong buying in IT stocks. The Nifty settled above the 24,200 mark after rebounding from an intraday low of 24,000.20. The Nifty IT index rallied 3.6%, led by a 5.5% jump in TCS, while consumer durables stocks also advanced. In contrast, FMCG and metal shares declined, while broader market indices ended largely flat. Investors largely shrugged off concerns over escalating geopolitical tensions in the Middle East and instead focused on stock-specific developments amid the ongoing first-quarter earnings season.

Going ahead, investors will closely monitor further developments in the US-Iran conflict, movements in crude oil prices, the ongoing Q1 earnings season, corporate business updates, and the progress of the southwest monsoon for cues on the market's near-term direction.

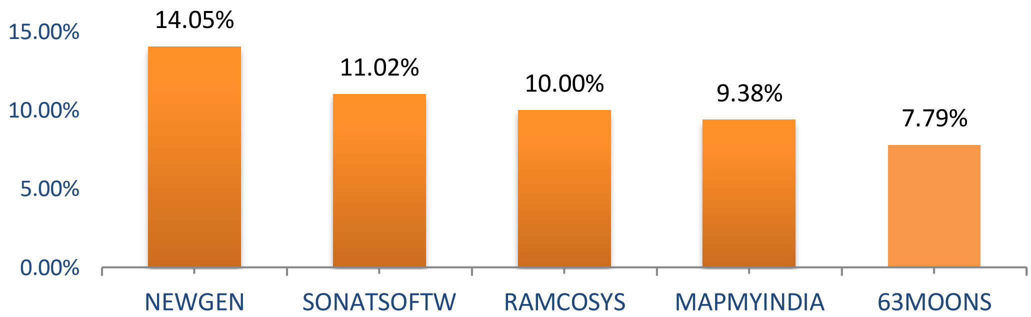
On the global front: European markets were trading mostly higher, after Germany's industrial production grew more than expected in May. Asian markets closed mostly in red despite Singapore's retail sales expanded for the fourth straight month in May.

Source- Capital Market

NEWS BULLETIN

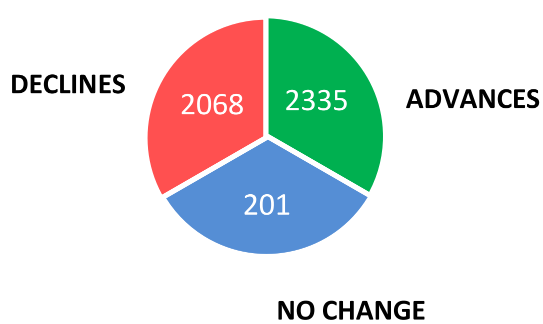
- **Apollo Micro Systems** entered into share purchase agreement with Premier Explosives to acquire 2.22 crore shares or 41.33% stake from the promoter AKS Family Trust.
- **Havells** India announced a strategic collaboration with Pixii AS, a Norway-based energy storage technology company, to develop and introduce advanced Battery Energy Storage Systems (BESS) for the Indian market.
- **JSW Energy** said that its step-down subsidiary, **JSW Energy PSP Eleven (JEPEL),** has secured orders worth Rs 443.74 crore from Bondada Renewable Energy for the supply of Battery Energy Storage System (BESS) and Power Conversion System (PCS) solutions.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 28,162.66
CHANGE: +950.73
CHANGE: +3.49%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.43	20.87

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