END DAY COMMENTARY

14th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,616.40	77,272.34	77,402.79	77,001.48	77,054.94	-561.46	-0.72
NIFTY	24,211.00	24,068.00	24,157.10	24,023.70	24,052.05	-158.95	-0.66

INDICES IN RED AMID GEOPOLITICAL TENSIONS IN WEST ASIA

The 30-share BSE Sensex was down by 561.46 points or 0.72% to settle at 77,054.94 and the Nifty was down by 158.95 points or 0.66% to settle at 24,052.05. The BSE Small Cap 250 was down by 1.08% and BSE 500 was down by 0.67%. On the sectoral front, Metal and Healthcare were gaining indices. On the flip side, Realty, Oil & Gas, IT, Banks, FMCG, Consumer Durables, Capital Goods and Auto were losing indices. Bharti Airtel, TCS, Sunpharma, Tata Steel and Adani Ports were gainers on the Sensex; on the flip side, HCL Tech, Indigo, Bajaj Finserv, SBIN and Mahindra & Mahindra 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 negative note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
BHARTIARTL	1,934.0	1,901.8	1.69
APOLLOHOSP	8,910.0	8,782.5	1.45
SUNPHARMA	1,944.8	1,921.4	1.22
DRREDDY	1,245.8	1,234.5	0.92
TATASTEEL	188.74	187.11	0.87

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,164.6	1,221.2	-4.63
SHRIRAMFIN	1,012.1	1,048.1	-3.43
HDFCLIFE	556.35	573.40	-2.97
TMPV	333.20	342.25	-2.64
SBIN	1,012.7	1,037.0	-2.34

Most Active (by value)

Name	Qty	Pr.	Value CR
TCS	9546290	2,197.0	2,100.57
HDFCBANK	25605395	809.00	2,078.90
ICICIBANK	14133017	1,406.4	1,984.74
RELIANCE	13511284	1,295.0	1,752.12
INFY	14819413	1,092.1	1,629.08

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	42966836	286.00	1,215.7
HDFCBANK	25605395	809.00	2,078.9
TATASTEEL	24096425	188.74	454.55
ONGC	16299949	248.01	405.72
KOTAKBANK	16237528	378.10	614.27

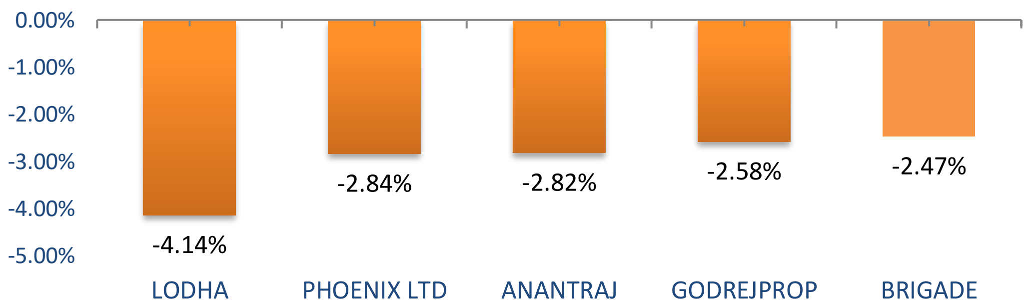
Indian equity benchmarks ended sharply lower on Tuesday amid rising geopolitical tensions in the West Asia East after the U.S. reinstated a naval blockade on Iranian shipping through the Strait of Hormuz and proposed charging a 20 percent transit fee on cargo passing through the strategic waterway. Markets made a negative start and remained under pressure throughout the session amid broad-based selling across sectors. Sentiments were further dampened as foreign institutional investors (FIIs) turned net sellers. Traders remained cautious as government data showed India's exports to the US dipped 1.21 per cent to $8.17 billion in June, while imports grew 33.86 per cent year-on-year to $5.5 billion. Sentiments got hit after India's wholesale price index (WPI) inflation surged to 9.87 per cent in the month of June 2026 from 9.68 per cent in May 2026, as a fresh spike in food, non-food articles and minerals outweighed a moderation in fuel inflation.

On the global front, European markets were trading in red, amid persistent concerns about artificial intelligence spending and escalating geopolitical tensions between the U.S. and Iran. Asian markets closed mostly in green, after China's exports surged 27% year-on-year in June, the fastest growth since 2021, while imports climbed 36% to a five-year high, despite lingering global uncertainties. Source- AceEquity

NEWS BULLETIN

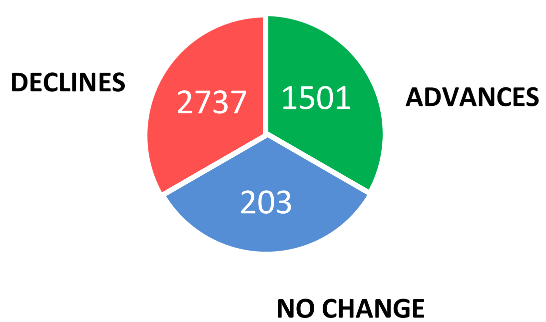
- **Welspun Corp** has secured fresh large orders worth around Rs 1,400 crore. The orders are for supply of pipes for Oil & Gas export projects from its India facility. With this addition, the company's consolidated global order book has scaled to Rs 23,650 crore (around $2.5 billion), reinforcing strong revenue visibility and providing continuity of operations across both India and USA manufacturing assets.
- **HCL Technologies** has reported over two-fold jump in its net profit at Rs 7,025 crore for the quarter ended June 30, 2026 as compared to Rs 2,888 crore for the same quarter in the previous year. The total income of the company has increased by 39.66% at Rs 18,738 crore for Q1FY27 as compared to Rs 13,417 crore for the corresponding quarter of the previous year.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 7,172.75
CHANGE: -139.55
CHANGE: - 1.91%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.04	20.72

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