END DAY COMMENTARY

15th JULY 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,054.94	77,192.76	77,646.27	76,982.82	77,185.43	+130.49	+0.17
NIFTY	24,052.05	24,085.85	24,220.35	24,010.55	24,078.50	+26.45	+0.11

INDICES CLOSED THE DAY ON A FLAT NOTE

The 30-share BSE Sensex was up by 130.49 points or 0.17% to settle at 77,185.43 and the Nifty was up by 26.45 points or 0.11% to settle at 24,078.50. The BSE Small Cap 250 was up by 0.69% and BSE 500 was up by 0.31%. On the sectoral front, Healthcare, Oil & Gas, Consumer Durables, Capital Goods, Banks and Auto were gaining indices. On the flip side, Metal, Realty, IT and FMCG were losing indices. Eternal, Ultratech Cement, SBIN, Bajaj Finance and Indigo were gainers on the Sensex; on the flip side, Powergrid, Larsen & Toubro, Tata Steel, Infosys and NTPC 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
ULTRACEMCO	11,830	11,496	2.91
ETERNAL	294.15	286.15	2.80
HDFCLIFE	567.20	555.20	2.16
SHRIRAMFIN	1,033.0	1,013.9	1.88
EICHERMOT	7,396.0	7,279.5	1.60

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	953.50	974.30	-2.13
POWERGRID	280.80	286.15	-1.87
TATASTEEL	185.16	188.27	-1.65
LT	3,793.0	3,848.7	-1.45
JSWSTEEL	1,229.7	1,247.7	-1.44

Most Active (by value)

Name	Qty	Pr.	Value CR
ICICIBANK	12961648	1,411.1	1,838.00
HDFCBANK	21488739	815.00	1,752.32
SBIN	14275394	1,030.8	1,467.70
LT	3602201	3,793.0	1,371.87
ETERNAL	45125835	294.15	1,320.38

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	45125835	294.15	1,320.3
TATASTEEL	24924570	185.16	465.74
HDFCBANK	21488739	815.00	1,752.3
SBIN	14275394	1,030.8	1,467.7
ONGC	13302251	247.10	329.43

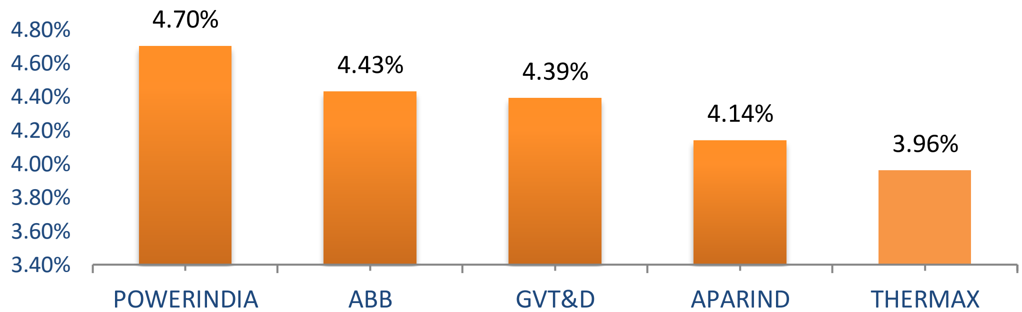
Indian equity benchmarks ended marginally higher on Wednesday as softer-than-expected U.S. inflation data reinforced expectations that the Federal Reserve may adopt a less aggressive monetary policy stance in the coming months. Markets made a slightly positive start and extended their gains during the morning session. Sentiments remained upbeat as U.S. President Donald Trump backed away from his threat to impose a 20% toll on all cargo transiting through the Strait of Hormuz. However, the benchmarks pared most of their early gains and traded near the neutral lines in the afternoon session, weighed down by losses in metal, IT, and FMCG stocks, along with continued foreign institutional investor (FII) outflows. Traders took a note of the Reserve Bank of India's (RBI) latest data report on ECB/FCCB showing that Indian companies raised around $4.74 billion through external commercial borrowings (ECBs) in the month of May 2026. This was higher than $3.77 billion raised in April 2026.

On the global front, European markets were trading mostly in red, amid concerns about the ongoing tensions in the Middle East. Asian markets closed mostly in green, following the positive cues from Wall Street overnight, after softer-than-expected US inflation data reduced expectations of a near-term interest rate hike by the US Fed. Source- AceEquity

NEWS BULLETIN

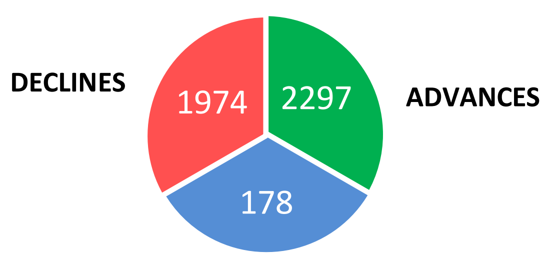
- **Jindal Saw** has reported a 69.84% decline in its standalone net profit at Rs 109.77 crore for the first quarter ended June 30, 2026 (Q1FY27), as compared to Rs 363.94 crore for the same quarter in the previous year. However, total income increased by 12.89% to Rs 3,755.66 crore for Q1FY27 as compared to Rs 3,326.82 crore for the corresponding quarter of the previous year.
- **Siyaram Recycling Industries** has secured an order worth Rs 97.94 lakh from Metal Scrap India. The order is for Brass Scrap and to be executed within 5 days.
- **Goldiam International** has secured purchase orders worth Rs 60 crore for manufacturing and export of lab-grown diamonds jewellery. The company has secured these orders from international USA clients. The orders are to be executed on or before October 31, 2026.

MARKET DRIVING SECTOR : CAPITAL GOODS



S&P BSE: CAPITAL GOODS
CLOSING: 79,111.66
CHANGE: + 995.11
CHANGE: + 1.27%

MARKET BREADTH – POSITIVE



NO CHANGE

RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.95	20.75

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