END DAY COMMENTARY

16th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,185.43	77,388.42	77,579.69	77,086.42	77,186.87	+1.44	+0.00
NIFTY	24,078.50	24,142.10	24,186.50	24,050.00	24,072.75	-5.75	-0.02

PROFIT BOOKING SEEN AT HIGHER LEVELS

The 30-share BSE Sensex was up by 1.44 points or 0.00% to settle at 77,186.87 and the Nifty was down by 5.75 points or 0.02% to settle at 24,072.75. The BSE Small Cap 250 was up by 0.10% and BSE 500 was down by 0.13%. On the sectoral front, Consumer Durables, IT, FMCG, Oil & Gas, Capital Goods and Auto were gaining indices. On the flip side, Banks, Healthcare, Metal and Realty were losing indices. Indigo, HCL Tech, Bajaj Finance, Maruti and Mahindra & Mahindra were gainers on the Sensex; on the flip side, Eternal, BEL, Bajaj Finserv, HDFC Bank and Axis Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,189.7	1,168.0	1.86
INDIGO	5,265.0	5,171.0	1.82
WIPRO	177.70	174.65	1.75
MARUTI	13,790	13,583.0	1.52
BAJFINANCE	1,036.5	1,021.30	1.49

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	285.95	294.80	-3.00
SBILIFE	1,824.1	1,866.4	-2.27
BAJAJFINSV	1,832.0	1,849.6	-0.95
BEL	407.25	410.95	-0.90
HDFCBANK	808.35	815.45	-0.87

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	15631046	1,300.00	2,033.90
HDFCBANK	18698186	808.35	1,516.05
ICICIBANK	10165264	1,418.00	1,437.23
TCS	5197595	2,199.10	1,150.10
LT	2936753	3,779.80	1,109.11

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	31866265	285.95	926.45
HDFCBANK	18698186	808.35	1,516
RELIANCE	15631046	1,300.0	2,033.9
TATASTEEL	13166990	185.79	244.46
ITC	11220653	279.80	312.71

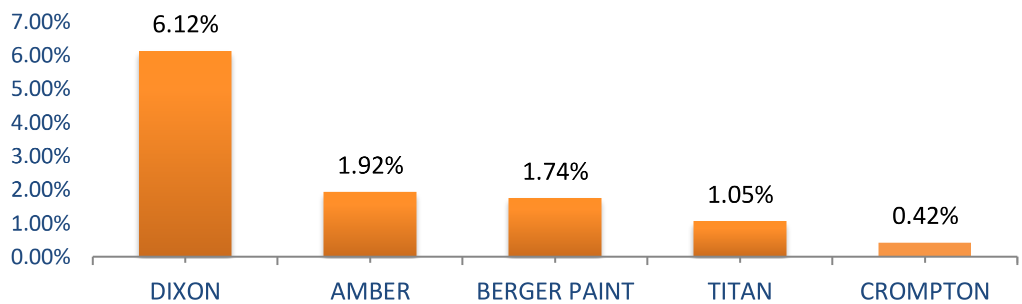
Indian equity benchmarks ended flat with a positive bias on Thursday, supported by sustained buying in IT stocks. The markets opened on a firm note amid optimism surrounding the ongoing June-quarter earnings season. However, profit booking at higher levels during the afternoon session erased most of the early gains and markets traded around neutral lines as escalating tensions in West Asia weighed on investors' sentiments. Traders took support with the Reserve Bank of India's (RBI) preliminary data on India's balance of payments (BoP) showed that India recorded a current account (net) surplus of $2.8 billion during April-May 2026, compared with a deficit of $4.1 billion in the corresponding period last year, mainly aided by higher inward remittances from abroad and a rise in services exports. Some support also came as Commerce Secretary Rajesh Agrawal stated that India has exported goods worth $140 million to the United Kingdom (UK) at zero duty under the comprehensive economic and trade agreement (CETA), which came into effect on July 15, 2026.

On the global front, European markets were trading in red, as investors weighed escalating Middle East tensions and monitored mixed earnings updates. Asian markets closed mostly in red, even as softer-than-expected U.S. inflation data eased concerns about near-term Federal Reserve interest-rate hikes. Source- AceEquity

NEWS BULLETIN

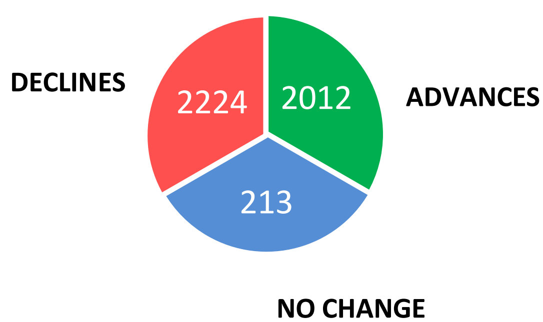
- **BHEL** has reported a standalone net profit of Rs 381.91 crore for the quarter ended June 30, 2026, against a net loss of Rs 454.89 crore for the same quarter in the previous year. Total income of the company increased by 39.77% to Rs 7,928.52 crore for Q1FY27 as compared to Rs 5,672.35 crore for the corresponding quarter of the previous year.
- **Polycab India** has reported a 35.63% rise in its standalone net profit at Rs 766.28 crore for the quarter ended June 30, 2026, as compared to Rs 565.00 crore for the same quarter in the previous year. Total income of the company increased by 40.20% to Rs 8,137.14 crore for Q1FY27 as compared to Rs 5,804.12 crore for the corresponding quarter of the previous year.
- **ITI** has received work order for expansion of 4G Mobile Network in West India from BSNL for total value of Rs 856.39 crore.

MARKET DRIVING SECTOR : CONSUMER DURABLES



S&P BSE: CONSUMER DURABLES
CLOSING: 63,430.18
CHANGE: + 709.32
CHANGE: + 1.13%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.97

PE MULTIPLE OF NIFTY
20.75

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