END DAY COMMENTARY

20th JULY 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,151.45	78,151.45	78,151.45	77,368.29	77,708.52	-442.93	-0.57
NIFTY	24,334.30	24,190.05	24,266.10	24,135.85	24,238.50	-95.80	-0.39

INDICES CLOSED THE DAY WITH MODERATE LOSS

The 30-share BSE Sensex was down by 442.93 points or 0.57% to settle at 77,708.52 and the Nifty was down by 95.80 points or 0.39% to settle at 24,238.50. The BSE Small Cap 250 was up by 0.21% and BSE 500 closed on flat note by 0.00%. On the sectoral front, Healthcare, Metal, Consumer Durables, FMCG, Oil & Gas and Capital Goods were gaining indices. On the flip side, IT, Auto, Banks and Realty were losing indices. Trent, Powergrid, NTPC, Bharti Airtel and SBIN were gainers on the Sensex; on the flip side, Axis Bank, HDFC Bank, Maruti, Kotak Bank and Infosys 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 green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TRENT	2,928.9	2,842.4	3.04
POWERGRID	289.25	283.55	2.01
NESTLEIND	1,453.0	1,427.2	1.81
NTPC	347.50	341.85	1.65
BHARTIARTL	1,939.9	1,908.8	1.63

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
AXISBANK	1,257.1	1,328.5	-5.37
HDFCBANK	777.95	819.60	-5.08
MARUTI	13,519.0	13,803.0	-2.06
KOTAKBANK	382.30	389.95	-1.96
JIOFIN	238.95	242.98	-1.66

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	56061789	777.95	4,376.35
ICICIBANK	22236415	1,461.0	3,240.94
AXISBANK	25314148	1,257.1	3,193.48
RELIANCE	14305844	1,321.9	1,902.89
SBIN	16540411	1,060.6	1,738.15

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	56061789	777.95	4,376.3
KOTAKBANK	32539419	382.30	1,238.5
AXISBANK	25314148	1,257.1	3,193.4
ICICIBANK	22236415	1,461.0	3,240.9
JIOFIN	19257829	238.95	461.46

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20th JULY 2026

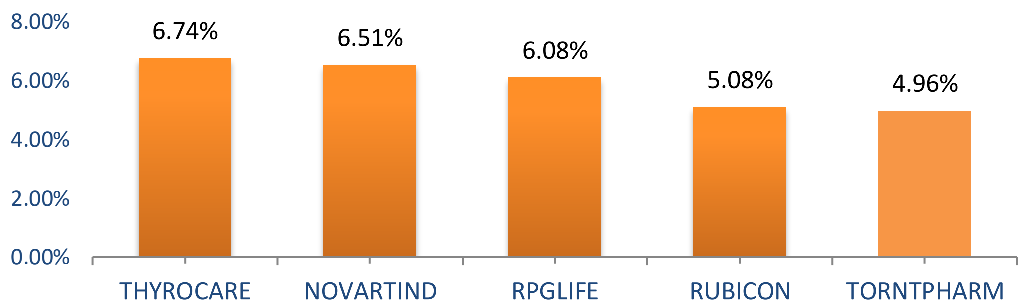
Indian equity benchmarks ended lower on Monday, as escalating geopolitical tensions in the West Asia weighed on investors' sentiments, fueling uncertainty across global markets. Markets made a gap-down opening and remained under pressure throughout the session, led by heavy selling in banking stocks following the release of their quarterly earnings. Traders overlooked Commerce and Industry Minister Piyush Goyal's statement that India and the European Union (EU) are working on the proposed investment protection and GI (Geographical Indications) agreement after concluding a free trade agreement. Traders also paid no heed towards the commerce ministry's data showing that Asean and African regions emerged as the biggest contributors to India's export growth during the first two months of the current fiscal. Traders remained cautious, as foreign institutional investors (FIIs) were net sellers on July 17, offloading Indian equities worth Rs 376 crore.

On the global front, European markets were trading mostly in green, ahead of the upcoming European Central Bank meeting, with the central bank widely expected to leave interest rates unchanged. Asian markets closed mixed, even after the Malaysian foreign trade surplus increased notably in June from a year ago as exports grew faster than imports. Source- AceEquity

NEWS BULLETIN

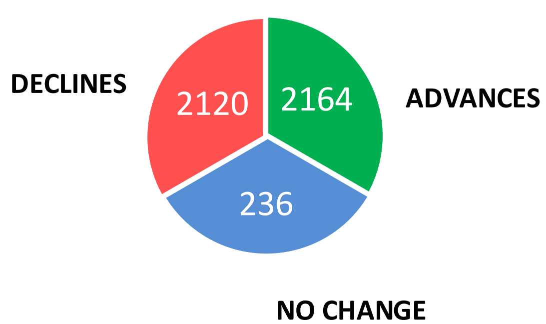
- **UltraTech Cement** has reported a 7.41% rise in its standalone net profit at Rs 2,397.12 crore for Q1FY27, as compared to Rs 2,231.79 crore for the same quarter in the previous year. Total income increased by 19.54% to Rs 23,656.65 crore for Q1FY27 as compared to Rs 19,789.64 crore for the corresponding quarter of the previous year.
- **Dhabriya Polywood** has received the work order worth Rs 18.59 crore (including GST) from a Indian Company. The order is for the supply & installation of aluminum door and windows. The project is scheduled to be completed by 11.4 months, in various tranches as per the terms of the order.
- **IDBI Bank** has reported a 5.37% rise in its standalone net profit at Rs 2,115.18 crore for the quarter ended June 30, 2026, as compared to Rs 2,007.36 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : HEALTHCARE



S&P BSE: HEALTHCARE
CLOSING: 50,342.07
CHANGE: + 551.75
CHANGE: + 1.11%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.24	20.88

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