END DAY COMMENTARY

21th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,708.52	77,649.63	77,753.18	77,337.33	77,470.11	-238.41	-0.31
NIFTY	24,238.50	24,216.05	24,262.20	24,135.65	24,187.70	-50.80	-0.21

INDICES EXTENDED LOSS FOR THE SECOND CONSECUTIVE DAY

The 30-share BSE Sensex was down by 238.41 points or 0.31% to settle at 77,470.11 and the Nifty was down by 50.80 points or 0.21% to settle at 24,187.70. The BSE Small Cap 250 was up by 0.19% and BSE 500 closed on flat note by 0.04%. On the sectoral front, Realty, Healthcare, Auto, Metal, Consumer Durables and Capital Goods were gaining indices. On the flip side, FMCG, Oil & Gas, IT and Banks were losing indices. Bajaj Finserv, Indigo, Ultratech Cement, HCL Tech and Mahindra & Mahindra were gainers on the Sensex; on the flip side, HDFC Bank, Reliance, SBIN, TCS and Infosys 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
SHRIRAMFIN	1,064.1	1,035.4	2.77
BAJAJFINSV	1,900.7	1,861.5	2.11
EICHERMOT	7,694.0	7,563.5	1.73
ULTRACEMCO	12,075	11,903	1.45
HCLTECH	1,238.9	1,221.3	1.44

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HDFCBANK	761.50	777.60	-2.07
INFY	1,070.6	1,087.1	-1.52
SBIN	1,044.3	1,060.0	-1.48
TCS	2,219.0	2,251.1	-1.43
RELIANCE	1,304.6	1,323.1	-1.40

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	42246009	761.50	3,233.76
ICICIBANK	18269907	1,463.1	2,674.53
AXISBANK	15014867	1,256.5	1,886.62
RELIANCE	12753410	1,304.6	1,670.07
SBIN	10514887	1,044.3	1,106.56

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	42246009	761.50	3,233.7
ETERNAL	22178874	287.60	632.65
TATASTEEL	21618426	187.30	403.03
ICICIBANK	18269907	1,463.1	2,674.5
JIOFIN	17460387	240.55	416.66

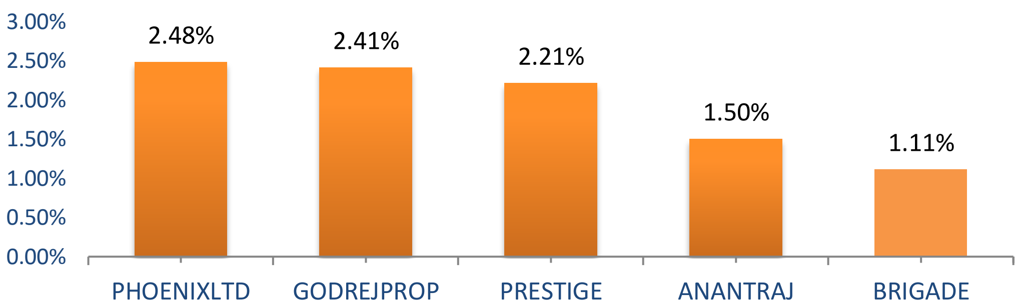
Indian equity benchmarks ended in negative territory on the Nifty 50 F&O expiry day, weighed down by persistent foreign institutional investors (FIIs) selling and escalating geopolitical tensions between the United States and Iran. After a cautious start, the indices extended their losses and traded in the red throughout the session, led by losses in index heavyweights - HDFC Bank, Infosys and Reliance Industries, and selling in IT stocks. Traders overlooked the government's latest data, which showed that growth in India's core industrial sector activity accelerated to 5% in June 2026, the fastest pace in five months. Traders paid no head towards the External Affairs Minister S Jaishankar said that India looks forward to building 'closer ties' with Panama because that country offers both a strategic location as well as enormous economic stability and potential for a partner like India. Traders remained cautious as data released by the RBI showed India's outward FDI, measured by financial commitment, and declined 47.9 per cent YoY to $3 billion in June 2026 from $5.74 billion in the same month last year.

On the global front, European markets were trading in green, as oil prices eased amid diplomatic efforts to ease the U.S.-Iran conflict. Asian markets closed mostly higher, after China maintained its loan prime rates unchanged for the fourteenth consecutive month. Source- AceEquity

NEWS BULLETIN

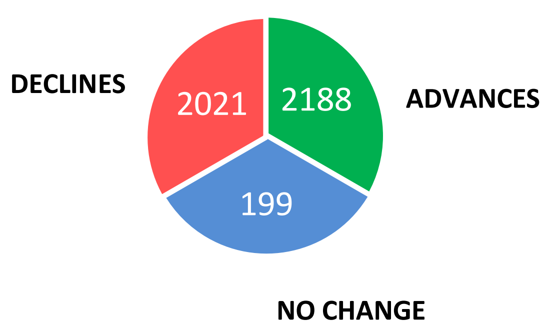
- **Zen Technologies** has received an order worth Rs 177.5 crore (including GST) from Ministry of Defence, Government of India. The order is for upgradation and integration of tank and crew gunnery simulators. The order is to be executed within a period of one year.
- **Siyaram Recycling Industries** has secured an order worth around Rs 2.34 crore from Dharma Metalex for Brass Scrap Honey. The order is to be executed within 15 days.
- **Granules India** has reported 3.25% rise in its net profit at Rs 71.75 crore for the quarter ended June 30, 2026 as compared to Rs 69.49 crore for the same quarter in the previous year. However, the total income of the company has decreased marginally to Rs 815.66 crore for Q1FY27 as compared to Rs 823.36 crore for the corresponding quarter previous year.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 7,235.33
CHANGE: + 77.32
CHANGE: + 1.08%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.91	20.82

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