END DAY COMMENTARY

23th JULY 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,755.05	76,515.10	76,726.66	76,151.98	76,391.39	-363.66	-0.47
NIFTY	23,996.25	23,904.80	23,990.75	23,807.20	23,869.60	-126.65	-0.53

INDICES EXTENDED LOSSES FOR THE FOURTH CONSECUTIVE DAY

The 30-share BSE Sensex was down by 363.66 points or 0.47% to settle at 76,391.39 and the Nifty was down by 126.65 points or 0.53% to settle at 23,869.60. The BSE Small Cap 250 was down by 1.20% and BSE 500 was down by 0.70%. On the sectoral front, there was no gaining index. On the flip side, Realty, Healthcare, Auto, FMCG, Metal, Consumer Durables, Capital Goods, Oil & Gas, IT and Banks were losing indices. Mahindra & Mahindra, TCS, Eternal, Bajaj Finserv and HCL Tech were gainers on the Sensex; on the flip side, Adani Ports, Bajaj Finance, Indigo, Axis Bank and SBIN 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 red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SBILIFE	1,859.00	1,806.70	2.89
BAJAJ-AUTO	11,279.0	10,998.5	2.55
M&M	3,230.00	3,175.30	1.72
TCS	2,245.00	2,208.30	1.66
TATACONSUM	1,110.10	1,094.90	1.39

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	3,014.0	3,147.7	-4.25
NESTLEIND	1,442.2	1,493.6	-3.44
SHRIRAMFIN	1,026.4	1,058.8	-3.06
ADANIPORTS	1,781.0	1,819.4	-2.11
GRASIM	3,101.0	3,166.3	-2.06

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	32532090	745.85	2,428.16
ETERNAL	64734810	287.10	1,877.70
ICICIBANK	12409328	1,433.4	1,781.02
RELIANCE	12580741	1,272.6	1,605.26
INFY	13794578	1,052.9	1,442.22

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	64734810	287.10	1,877.7
HDFCBANK	32532090	745.85	2,428.1
ITC	21143589	281.55	594.92
TATASTEEL	20581098	184.20	380.03
INFY	13794578	1,052.9	1,442.2

Indian equity benchmarks extended their losses for fourth straight session on Thursday, as escalating tensions in the Middle East fueled surge in global oil prices. Markets made a negative start and traded their neutral lines, led by heavy selling across most sectors, with Realty, Oil & Gas, and Banking stocks emerging as the worst performers. In the afternoon session, markets extended their losses further to end the session with cut of around half a percent each. Traders overlooked the Reserve Bank Bulletin said Indian economy has navigated the external uncertainties well and the recovery of foreign investments in recent months shows a revival of confidence. Crisil Ratings' report stated that elevated input costs due to the ongoing West Asia conflict will pare the operating margin of cement makers by Rs 50-75 per tonne this fiscal to Rs 925-950 per tonne.

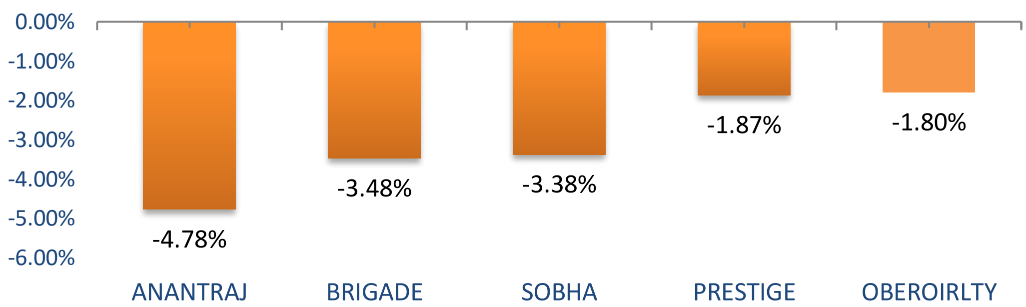
On the global front, European markets were trading in red, after US military conducted strikes against Iran for the twelfth consecutive night with both sides increasingly targeting civilian infrastructure. Asian markets closed mostly in green as renewed AI optimism helped offset escalating Middle East tensions.

Source- AceEquity

NEWS BULLETIN

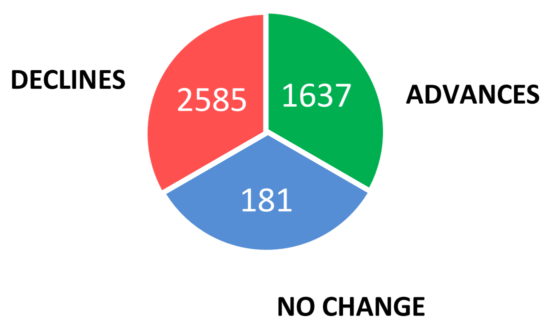
- **Vishal Mega Mart** has reported a marginal decline in its net profit at Rs 173.19 crore for the quarter ended June 30, 2026, as compared to Rs 176.62 crore for the same quarter in the previous year. However, total income increased by 13.92% to Rs 1,918.10 crore for Q1FY27 as compared to Rs 1,683.74 crore for the corresponding quarter of the previous year.
- **Tanla Platforms** has reported 53.43% jump in its net profit at Rs 80.20 crore for first quarter ended June 30, 2026 (Q1FY27) as compared to Rs 52.27 crore for the same quarter in the previous year.
- **Cipla** has reported a 33.84% decline in its net profit at Rs 862.16 crore for the quarter ended June 30, 2026, as compared to Rs 1,303.13 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 6,920.12
CHANGE: - 125.45
CHANGE: - 1.78%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.80	20.37

For Disclosure & Disclaimer, click here