END DAY COMMENTARY

27th JULY 2026

Hem Securities
Building your wealth through values

BROKING | INVESTMENT BANKING | RESEARCH | DISTRIBUTION | DEPOSITORY|PMS

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,059.77	76,608.98	76,901.51	76,517.85	76,835.78	+776.01	+1.02
NIFTY	23,767.45	23,928.40	24,011.60	23,891.55	23,995.95	+228.50	+0.96

INDICES STARTED THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 776.01 points or 1.02% to settle at 76,835.78 and the Nifty was up by 228.50 points or 0.96% to settle at 23,995.95. The BSE Small Cap 250 was up by 1.34% and BSE 500 was up by 1.05%. On the sectoral front, Healthcare, Capital Goods, Realty, FMCG, IT, Bank, Consumer Durables, Auto, Metal and Oil & Gas were gaining indices. On the flip side, there was no the losing index. Eternal, Indigo, Infosys, Bajaj Finance and Asian Paint were gainers on the Sensex; on the flip side, HDFC Bank and Axis Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a green note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	295.70	280.00	5.61
INDIGO	5,240.0	4,985.0	5.12
INFY	1,078.3	1,040.9	3.59
BAJFINANCE	1,049.0	1,012.8	3.57
MAXHEALTH	1,116.1	1,080.4	3.30

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ONGC	238.39	248.76	-4.17
HDFCLIFE	552.60	555.05	-0.44
HDFCBANK	740.25	742.80	-0.34
POWERGRID	287.95	288.20	-0.09
COALINDIA	427.00	427.40	-0.09

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	29678752	740.25	2,198.8
INFY	15956349	1,078.3	1,716.0
ICICIBANK	10608300	1,445.5	1,527.0
ETERNAL	48012383	295.70	1,407.8
SUNPHARMA	5414380	1,973.0	1,060.4

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	48012383	295.70	1,407.8
HDFCBANK	29678752	740.25	2,198.8
ONGC	19910285	238.39	479.98
ITC	19312804	285.95	553.60
KOTAKBANK	16710096	386.00	643.42

Indian equity benchmarks snapped a five-session losing streak on Monday, with both the Nifty and Sensex closing around 1% higher amid signs of easing geopolitical tensions in West Asia after the US and Iran halted strikes over the weekend. Markets made a gap-up opening and remained higher throughout session, supported by broad-based buying across sectors, with IT stocks leading the gains.

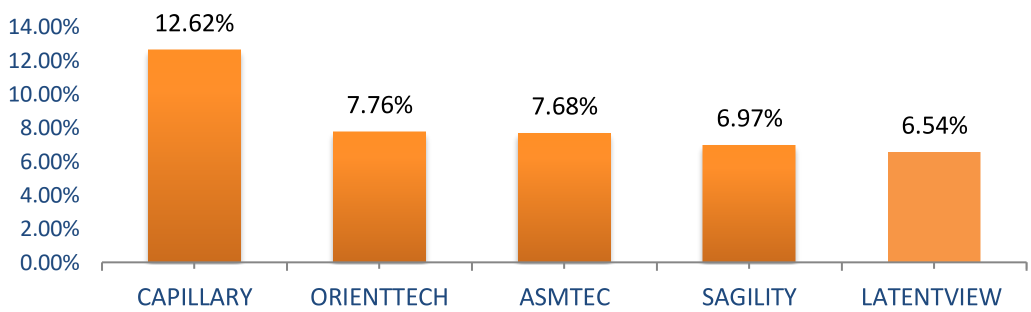
India, Israel conclude second round of trade pact negotiations: Traders took support as the Commerce Ministry stated the second round of negotiations for the proposed free trade agreement between India and Israel covering multiple issues such as trade in goods and services, rules of origin, technical barriers, intellectual property rights, customs procedures and trade facilitations has been concluded this week

On the global front: European markets were trading in green, amid easing tensions between US and Iran. Asian markets closed mostly in green after Japan's leading index strengthened less than initially estimated in May to the highest level in nearly five years. Source- Ace Equity

NEWS BULLETIN

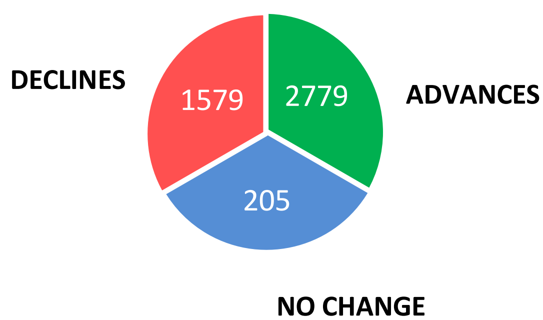
- **Larsen & Toubro's (L&T)** Residential, Commercial Buildings & Factories (RCF) business vertical has secured a major order from a reputed client for a largescale housing redevelopment project in Mumbai. L&T has categorized the order as a major order, with a value ranging from Rs 5,000 crore to Rs 10,000 crore.
- **Wipro** has enhanced partnership with Databricks, the Data and AI Company, to enable enterprises to modernize data foundations and accelerate AI adoption.
- **Engineers India** has signed a memorandum of understanding (MoU) with the Directorate General of Maritime Administration (DGMA), formerly the Directorate General of Shipping, under the Ministry of Ports, Shipping and Waterways, Government of India.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 28,352.27
CHANGE: +638.11
CHANGE: +2.30%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO
1.11

PE MULTIPLE OF NIFTY
20.49