END DAY COMMENTARY

29th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,765.92	77,423.77	77,765.49	77,333.24	77,654.60	+888.68	+1.16
NIFTY	23,985.35	24,176.65	24,283.55	24,136.75	24,250.20	+264.85	+1.10

INDIAN MARKET CLOSED ON A STRONG NOTE

The 30-share BSE Sensex was up by 888.68 points or 1.16% to settle at 77,654.60 and the Nifty was up by 264.85 points or 1.10% to settle at 24,250.20. The BSE Small Cap 250 was up by 1.47% and BSE 500 was up by 1.02%. On the sectoral front, IT, Consumer Durables, Metal, Healthcare, Capital Goods, FMCG and Bank were the gaining indices. On the flip side, Realty, Oil & Gas and Auto were the losing indices. Hindustan Unilever, Infosys, Trent, Larsen & Toubro and Tata Steel were gainers on the Sensex; on the flip side, Adani Port, M&M, Powergrid, BEL and NTPC 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.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	248.75	237.08	4.92
HINDUNILVR	2,120.0	2,022.7	4.81
INFY	1,153.5	1,105.7	4.32
HINDALCO	964.00	936.40	2.95
TATASTEEL	187.50	182.63	2.67

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIPORTS	1,721.0	1,774.7	-3.03
M&M	3,228.0	3,271.2	-1.32
POWERGRID	283.40	285.30	-0.67
EICHERMOT	7,796.0	7,836.0	-0.51
BAJAJ-AUTO	11,325.5	11,374.0	-0.43

Most Active (by value)

Name	Qty	Pr.	Value CR
INFY	34400369	1,153.5	3,964.2
TCS	7169419	2,440.0	1,757.1
ICICIBANK	10856166	1,437.8	1,561.4
ETERNAL	49740797	311.70	1,554.5
HDFCBANK	20460659	748.30	1,530.0

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	49740797	311.70	1,554.5
JIOFIN	48984683	248.75	1,211.8
INFY	34400369	1,153.5	3,964.2
BEL	32630643	387.50	1,258.0
WIPRO	26147867	183.30	481.43

Indian equity markets witnessed gaining rally on Wednesday, lifting both Sensex and Nifty over a percent higher, with TECK and IT heavyweights among the lead gainers. After a strong start, markets remained under bulls' grip for the whole day, even as crude oil prices traded higher and global cues remained weak amid reports of fresh escalation in the Middle East.

Traders got encouragement after the Ministry of Statistics and Programme Implementation showed that Index of Industrial Production (IIP) jumped to 7.3 percent for the month of June 2026 (Base 2022-23=100) from a revised growth of 5.0 percent in May 2026, supported by sharp expansion in manufacturing and strong growth in electricity and gas supply.

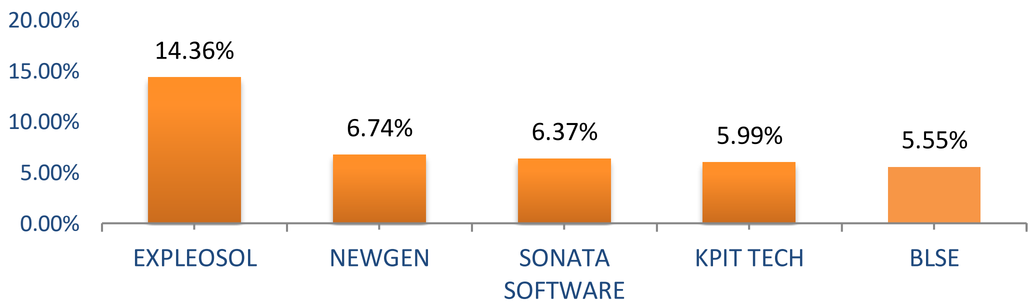
Weak global cues: European markets were trading mostly in red, while Asian markets ended mostly lower, as joint strikes in Iraq by the United States and Saudi Arabia raised concerns about a prolonged war in the Middle East. Caution ahead of big tech earnings and the Federal Reserve's interest-rate decision later in the day also kept investors on edge.

Source- Ace Equity

NEWS BULLETIN

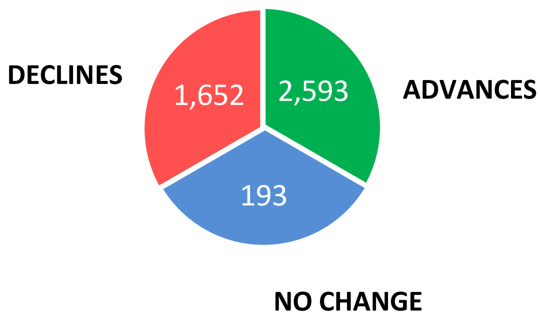
- **Oriental Rail Infrastructure** has secured an order worth Rs 5.25 crore from Modern Coach Factory (MCF), Raebareli, Indian Railways. The order is for the manufacturing and supply of 78-seater LHB 2nd AC Chair Car coach seating arrangement as per MCF specifications. The order is to be executed by January 30, 2027.
- **Rashtriya Chemicals and Fertilizers (RCF) and GAIL (India)** have entered into a Memorandum of Understanding (MoU) for establishing a gas-based fertilizer project in the State of Maharashtra jointly through a Special Purpose Vehicle (SPV).
- **Tech Mahindra** has launched new Engineering Experience Centre at Hyderabad alongside the unveiling of its engineering proposition, 'Accelerating Breakthroughs'.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 29,918.98
CHANGE: +700.77
CHANGE: +2.40%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO
1.19

PE MULTIPLE OF NIFTY
20.69