

WEEKLY COMMENTARY

1 AUGUST 2026



Hem Securities
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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76059.77	76608.98	78272.25	76517.85	78094.64	+2034.87	+2.68
NIFTY 50	23767.45	23928.40	24429.40	23891.55	24383.60	+616.15	+2.59

MARKETS ENDED THE WEEK WITH STRONG GAINS

Indian equity benchmark ended on a green note in the week ended 1 August, 2026. Key indices were positive in four out of five sessions of the week. The S&P BSE Sensex was green by 2034.87 points or 2.68% to settle at 78094.64 in the week ended 1 August, 2026. The CNX Nifty was up by 616.15 points or 2.59% to settle at 24383.60. The BSE 500 index was up by 855.37 or 2.39% to settle at 36684.83. The BSE Small-Cap index was up by 134.61 points or 1.94% to settle at 7059.06.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ FINANCE	1141.2	1012.8	12.6
JIO FINANCIAL	256.46	234.71	9.27
INFOSYS LTD	1130.1	1040.9	8.57
BAJAJ FINSERV	2029.1	1876.7	8.12
ETERNAL LTD	302.45	280.00	8.02

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BEL	387.85	405.00	-4.23
ADANI PORTS	1696.5	1768.3	-4.06
COAL INDIA	414.15	427.4	-3.10
ONGC LTD	242.53	248.76	-2.50
HUL	2101.3	2145.0	-2.04

MARKET STATS

Most Active (by value)

Name	Avg Value	Pr.	Qty
INFOSYS LTD	13047.5	1130.1	115454.91
HDFC BANK	10877.5	748.15	145392.32
ICICI BANK	9164.2	1435.4	63844.28
BAJAJ FINANCE	7927.1	1141.2	69462.89
ETERNAL LTD	7179.1	302.45	237365.94

Most Active (by volume)

Name	Avg Value	Pr.	Qty
ETERNAL LTD	7179.1	302.45	237365.94
HDFC BANK	10877.5	748.15	145392.32
WIPRO LTD	2539.9	183.65	138303.44
JIO FINANCIAL	3222.2	256.46	125643.16
INFOSYS LTD	13047.5	1130.1	115454.91



INSTITUTIONAL NET POSITION



FII's Cash	• +5,949.96
FII's Index Future	• +3,185.58
FII's Stock Future	• +13,063.96
DII's Cash	• +5,387.66

On Monday, 27 July, 2026, the benchmark indices ended with decent gains. The S&P BSE Sensex climbed 776.01 points or 1.02% to 76,835.78. On Tuesday, 28 July, 2026, the benchmark indices retreated. The S&P BSE Sensex declined 69.86 points or 0.09% to 76,765.92. On Wednesday, 29 July, 2026, indices rallied sharply. The S&P BSE Sensex soared 888.68 points or 1.16% to 77,654.60. On Thursday, 30 July, 2026, the benchmark indices ended with modest gains. The S&P BSE Sensex advanced 273.55 points or 0.35% to 77,928.15. On Friday, 31 July, 2026, The key domestic indices ended higher. The S&P BSE Sensex advanced 166.49 points or 0.21% to 78,094.64.

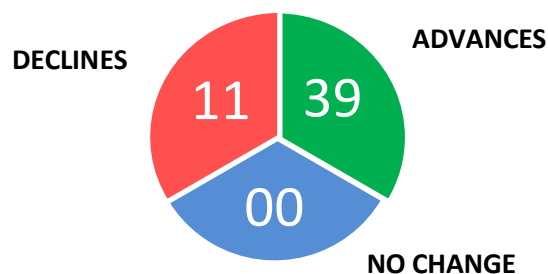
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended the week with strong gains, supported by robust Q1 FY27 corporate earnings, broad-based buying and resilient domestic sentiment. Higher foreign exchange reserves and encouraging macroeconomic indicators further boosted confidence.

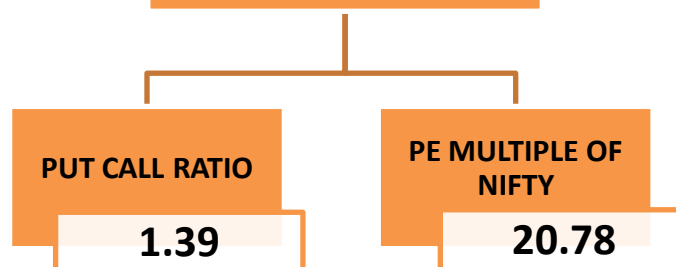
MARKET WATCH- COMING WEEK

Indian equities are expected to trade with a positive-cautious bias amid elevated geopolitical tensions and a hawkish U.S. Fed stance. Investors will closely monitor the RBI's monetary policy decision, the ongoing Q1 FY27 earnings season, HSBC PMI data, foreign exchange reserves, crude oil prices, and developments in the U.S.-Iran conflict.

NIFTY MARKET BREADTH (W) - POSITIVE



RATIO ANALYSIS

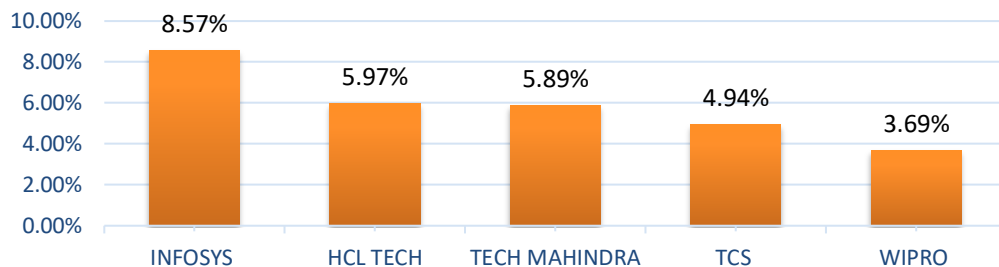




NEWS BULLETIN

- **Dr. Reddy's Laboratories** has received approval from U.S. Food and Drug Administration (USFDA) for its rituximab biosimilar, a biosimilar to Rituxan (rituximab), for the U.S. market. The approval further strengthens its growing global biosimilars portfolio and advances its biosimilars business in the United States. Rituximab is a monoclonal antibody that selectively targets the CD20 protein expressed on B-cells.
- The **Ministry of Tourism, Government of India**, has signed a Memorandum of Understanding (MoU) with **InterGlobe Aviation (IndiGo)** to promote India as a preferred global tourism destination through a strategic, non-exclusive and non-financial collaboration.
- **Tata Power Company's subsidiary -- Tata Power Renewable Energy (TPREL)** has conducted the groundbreaking ceremony of its 800 MW renewable energy project. The project plays an important role in the company's commitment to accelerating India's clean energy transition through innovative and reliable renewable energy solutions.

MARKET DRIVING SECTOR : IT



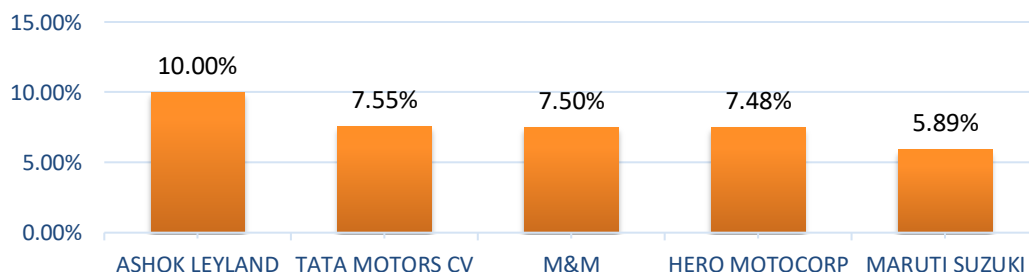
NIFTY IT

CLOSING: 30708.90

CHANGE: +1940.95

CHANGE: +6.75%

MARKET DRIVING SECTOR : AUTO



NIFTY AUTO

CLOSING: 28744.15

CHANGE: +1526.20

CHANGE: +5.61%

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