END DAY COMMENTARY

4TH AUGUST 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	78,639.03	79,132.97	79,143.15	78,211.87	78,428.95	-210.08	-0.27
NIFTY	24,774.30	24,703.90	24,703.90	24,427.95	24,614.90	-159.40	-0.64

INDICES SAW MILD PROFIT BOOKING AFTER A FOUR-DAY RALLY

The 30-share BSE Sensex was down by 210.08 points or 0.27% to settle at 78,428.95 and the Nifty was down by 159.40 points or 0.64% to settle at 24,614.90. The BSE Small Cap 250 was up by 0.27% and BSE 500 was down by 0.14 %. On the sectoral front, Healthcare, Capital Goods, Metal and Consumer Durables were the gaining indices. On the flip side, Oil & Gas, Auto, FMCG, IT, Bank and Realty were the losing indices. Trent, Bajaj Finance, BEL, Tata Steel and M&M were gainers on the Sensex; on the flip side, HUL, NTPC, HDFC Bank, Reliance and Indigo 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
APOLLOHOSP	9,050.0	8,820.0	2.61
HINDALCO	1,020.0	994.90	2.52
TRENT	3,107.7	3,050.0	1.89
JIOFIN	265.00	263.00	0.76
ITC	289.00	287.00	0.70

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
GRASIM	3,138.0	3,260.0	-3.74
HDFCLIFE	535.95	553.10	-3.10
BAJAJ-AUTO	11,600.0	11,856.0	-2.16
RELIANCE	1,290.9	1,319.0	-2.13
MAXHEALTH	1,077.0	1,100.4	-2.13

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	31559802	742.00	2,343.7
ICICIBANK	11458963	1,454.6	1,652.2
RELIANCE	10759546	1,290.9	1,394.8
BAJFINANCE	9437990	1,149.0	1,083.4
INFY	9243589	1,167.5	1,072.7

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	31559802	742.00	2,343.7
JIOFIN	24776731	265.00	655.22
TATASTEEL	22165429	190.95	422.92
ETERNAL	16096034	312.40	500.54
ITC	12689243	289.00	363.99

Indian equity benchmarks snapped a four-day winning streak on Tuesday, dragged down by losses in banking, Oil & Gas, and IT stocks. Markets made mixed start but soon slipped below neutral lines. Trade remained lacklustre during the afternoon session ahead of the RBI's interest rate decision tomorrow. Also, sentiment remained subdued due to persistent concerns over supply disruptions and uncertainty surrounding a diplomatic resolution between the US and Iran.

Govt hikes windfall tax on petrol, diesel, ATF exports: Sentiments remained subdued as government has increased the windfall tax on exports of petrol, diesel, and aviation turbine fuel (ATF) for the fortnight starting August 3, 2026. The rate of special additional excise duty (SAED) on export of diesel will be Rs 25.5 per litre, up from Rs 15.5 per litre. SAED on export of ATF will be Rs 22 per litre, as against Rs 14.5 per litre earlier.

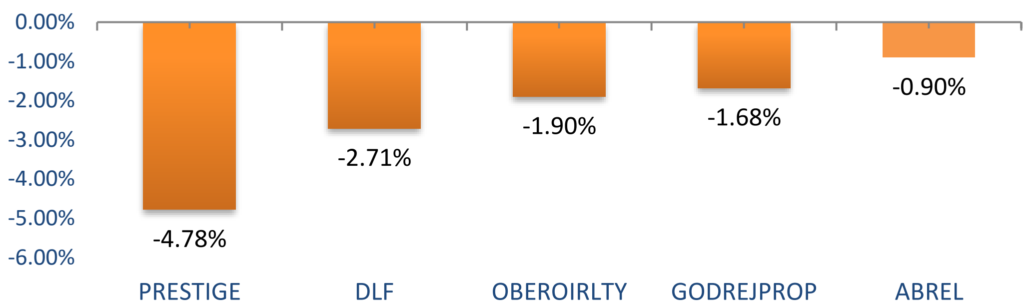
On the global front: European markets were trading mostly in green, as investors reacted to upbeat U.S. manufacturing data and mixed signals regarding U.S.-Iran peace negotiations. Asian markets closed mostly higher following the broadly positive cues from Wall Street overnight.

Source- Ace Equity

NEWS BULLETIN

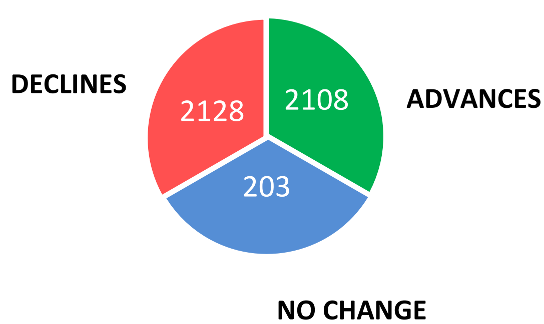
- **Coal India** has reported rise of 8.4% in coal production to 50.4 million tonnes (MT) (Provisional) during July 2026 as compared to 46.4 MT (Provisional) in July 2025. It produced 220.0 MT (Provisional) of coal during April-July period of 2026, down 4.3% from 229.8 MT (Provisional) during the same period previous year.
- **NTPC and Evren** have signed 750 MW power purchase agreement (PPA) for solar, wind, and battery energy storage projects in Andhra Pradesh and Rajasthan. The project, once operational, will generate 2.5 billion units of clean energy annually and mitigate 1.8 million tonnes of carbon dioxide emissions every year.
- **Larsen & Toubro's (L&T)** business vertical -- L&T Energy Hydrocarbon Offshore (LTEH Offshore) has secured an ultra-mega order from ADNOC Offshore for a major project in the Middle East.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 6,959.17
CHANGE: -83.34
CHANGE: -1.18%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.89	20.89

For Disclosure & Disclaimer, click here