END DAY COMMENTARY

05rd AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,428.95	79,055.38	79,055.38	78,285.74	78,581.00	+152.05	+0.19
NIFTY	24,614.90	24,669.20	24,677.60	24,497.95	24,624.65	+09.75	+0.04

RBI KEPT REPO RATE UNCHANGED @ 5.25

The 30-share BSE Sensex was up by 152.05 points or 0.19% to settle at 78,581.00 and the Nifty was up by 09.75 points or 0.04% to settle at 24,624.65. The BSE Small Cap 250 was up by 0.70% and BSE 500 was up by 0.38%. On the sectoral front, Metal, IT, Realty, Healthcare, FMCG, Banks, Auto and Consumer Durables were gaining indices. On the flip side, Capital Goods and Oil & Gas were losing indices. Ultratech Cement, NTPC, SBIN, Mahindra & Mahindra and Indigo were gainers on the Sensex; on the flip side, TCS, HCL Tech, Reliance, BEL and Sunpharma 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 green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAMFIN	1,122.4	1,087.3	3.23
GRASIM	3,224.0	3,138.0	2.74
JSWSTEEL	1,330.0	1,300.0	2.31
HINDALCO	1,040.0	1,020.0	1.96
NTPC	349.90	343.65	1.82

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TCS	2,413.0	2,460.0	-1.91
APOLLOHOSP	8,910.0	9,050.0	-1.55
HCLTECH	1,350.0	1,369.9	-1.45
SUNPHARMA	1,940.0	1,964.0	-1.22
JIOFIN	261.95	265.00	-1.15

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	60050538	735.00	4,420.98
RELIANCE	24820782	1,280.0	3,179.15
BHARTIARTL	14286999	1,978.0	2,820.84
ICICIBANK	11723296	1,450.1	1,691.07
INFY	9964155	1,174.0	1,163.82

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	60050538	735.00	4,420.9
RELIANCE	24820782	1,280.0	3,179.1
TATASTEEL	22780522	192.99	436.06
JIOFIN	19828927	261.95	524.30
ONGC	19409088	240.20	466.98

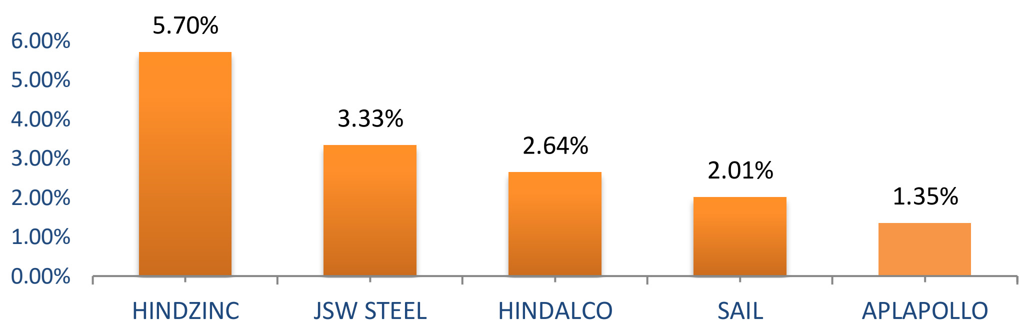
Indian equity markets flat with positive bias on Wednesday after the Reserve Bank of India (RBI) kept the policy repo rate unchanged at 5.25% for the fifth consecutive time and retained its neutral policy stance. Also, some support came as tensions in West Asia showed signs of easing after Qatar said mediators were making progress in efforts to end the US-Iran war. Though, there was some volatility in the markets after India's services sector growth fell to a 4.5-year low in July due to weak demand & fierce competition. Traders took some support as Finance Minister Nirmala Sitharaman said that Indian economy is set to cross $5-trillion mark in FY29 as per the International Monetary Fund (IMF) and the government has adopted a broad-based growth strategy to achieve the milestone. Some cautiousness came as India's services sector growth fell to a 4.5-year low in July due to weak demand & fierce competition.

On the global front, European markets were trading mostly in red, after France's manufacturing activity showed signs of improvement with PMI rising to 49.4 in July from 47.2 in June, marking the weakest contraction in three months. Asian markets closed mostly higher as crude oil prices slumped and global bond yields eased amid hopes for progress on opening the Strait of Hormuz.
Source- AceEquity

NEWS BULLETIN

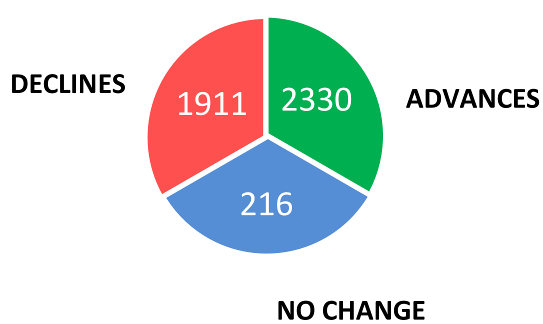
- **Apollo Micro Systems** has secured orders worth Rs 213.39 crore. The company has received orders from Defence Research and Development Organisation (DRDO), Defence Public Sector Undertakings (PSUs), and Private Industries.
- **NHPC** has reported 3.88% rise in its net profit at Rs 1,113.41 crore for the quarter ended June 30, 2026 as compared to Rs 1,071.87 crore for the same quarter in the previous year. The total income of the company has increased by 15.76% at Rs 3,742.31 crore for Q1FY27 as compared to Rs 3,232.87 crore for the corresponding quarter previous year.
- **BSE** has reported a 71.04% jump in its net profit at Rs 801.15 crore for the quarter ended June 30, 2026, as compared to Rs 468.40 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 42,420.86
CHANGE: + 669.20
CHANGE: + 1.60%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.91	20.91

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