WEEKLY COMMENTARY

08 AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,094.64	78,883.34	79,143.15	78,211.87	78,499.17	+404.53	+0.52
NIFTY 50	24,383.60	24,572.70	24,774.30	24,427.95	24,570.65	+187.05	+0.77

INDICES CLOSED THE WEEK ON A STRONG NOTE

Indian equity benchmark ended on a green note in the week ended 08 Aug, 2026. Key indices were positive in three out of five sessions of the week. The S&P BSE Sensex was up by 404.53 points or 0.52% to settle at 78,499.17 in the week ended 08 Aug, 2026. The CNX Nifty was up by 187.05 points or 0.77% to settle at 24,570.62. The BSE 500 index was up by 414.74 or 1.13% to settle at 37,099.57. The BSE Small-Cap index was up by 181.09 points or 2.57% to settle at 7,240.15.

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO IND	1,059.60	974.45	8.74
GRASIM IND	3,323.00	3,100.80	7.17
STATE BANK	1,097.20	1,027.40	6.79
SHRIRAM FIN	1,115.00	1,046.70	6.53
ETERNAL LTD	315.00	302.45	4.15

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ FIN	1,078.00	1,141.20	-5.54
POWERGRID CORP	271.60	284.25	-4.45
MAX HEALTHCARE	1,070.00	1,098.50	-2.59
HDFC BANK	731.00	748.15	-2.29
SUNPHARMA	1,945.00	1,990.50	-2.29

Most Active (by value)

Name	Avg Value	Pr.	Qty
HDFC BANK	12,470.30	731.00	17,05,923.36
RELIANCE IND	9,786.26	1,334.80	7,33,162.88
ICICI BANK	8,560.04	1,421.00	6,02,395.24
STATE BANK	7,789.20	1,097.20	7,09,916.40
BHARTI AIRTEL	6,278.95	1,959.90	3,20,371.12

Most Active (by volume)

Name	Avg Value	Pr.	Qty
HDFC BANK	12,470.30	731.00	17,05,923.36
JIO FINANCIAL	2,768.86	256.80	10,78,217.92
TATA STEEL	1,898.68	187.55	10,12,361.60
ETERNAL LTD	3,087.74	315.00	9,80,233.92
ITC LTD	2,529.97	286.10	8,84,297.12

INSTITUTIONAL NET POSITION

FIIs Cash	+2,887.69
FIIs Index Future	+3,730.09
FIIs Stock Future	-1,326.22
DIIs Cash	+7,767.37

On Monday, 03 Aug, 2026, The benchmark indices ended higher, extending gains for the fourth consecutive trading session. The S&P BSE Sensex jumped 544.39 points or 0.70% to 78,639.03. On Tuesday, 04 Aug, 2026, The benchmark indices ended lower. The Index declined 210.08 points or 0.27% to 78,428.95. On Wednesday, 05 Aug, 2026, The benchmark indices ended higher after the RBI kept the repo rate unchanged at 5.25%. The S&P BSE Sensex jumped 152.05 points or 0.19% to 78,581. On Thursday, 06 Aug, 2026, The benchmark indices ended higher in a volatile session. The S&P BSE Sensex, jumped 373.76 points or 0.48% to 78,954.76. On Friday, 07 Aug, 2026, The key equity indices ended with modest losses. The S&P BSE Sensex declined 455.59 points or 0.58% to 78,499.17.

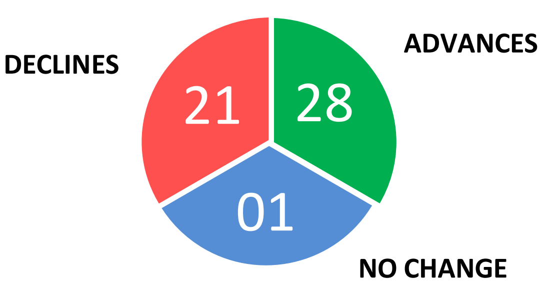
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended the week positively amid heightened volatility following the rollout of SEBI's new Closing Auction Session (CAS) mechanism and cautious investor sentiment ahead of the RBI policy decision. The RBI kept the repo rate unchanged at 5.25% while raising its FY27 GDP growth forecast to 6.7% and lowering its inflation projection to 5.0%. Although easing geopolitical tensions and resilient Q1 FY27 earnings provided support, concerns over market volatility, global uncertainties, crude oil prices and slowing domestic activity kept gains in check.

MARKET WATCH- COMING WEEK

Indian equities are likely to remain cautious, with focus on July inflation data, Q1 FY27 earnings, crude oil prices and developments around the Strait of Hormuz. The RBI's decision to hold the repo rate at 5.25% amid inflation and geopolitical risks may keep rate-cut expectations subdued. Global markets will also track US inflation, PPI and retail sales, along with China's inflation and trade data, while corporate commentary on demand, input costs and geopolitical risks will remain key market triggers.

NIFTY MARKET BREADTH (W) - POSITIVE

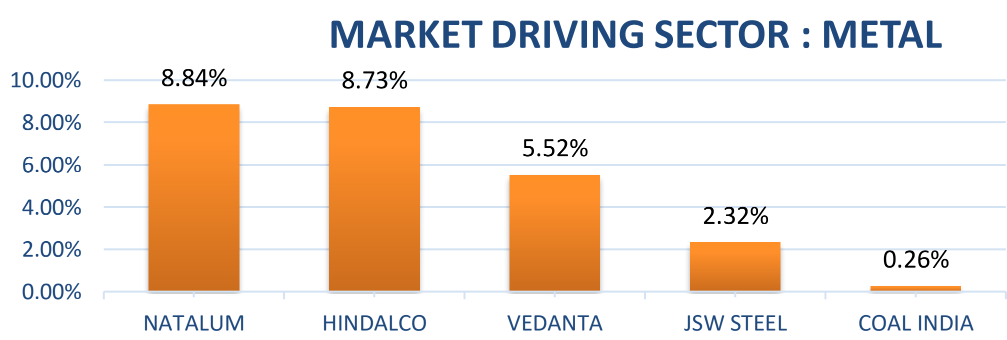


RATIO ANALYSIS

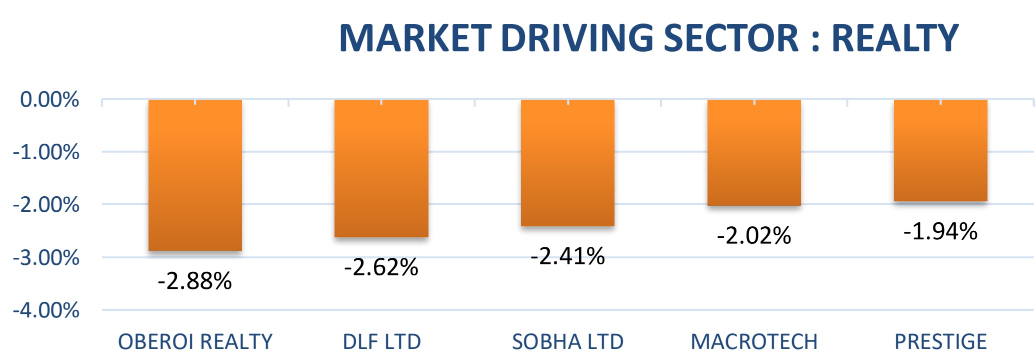
PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.89	20.87

NEWS BULLETIN

- **LIC** has reported 22.81% rise in its net profit at Rs 13,492.03 crore for the quarter ended June 30, 2026 as compared to Rs 10,986.51 crore for the same quarter in the previous year. The total income of the company has increased by 6.72% at Rs 2,37,847.70 crore for Q1FY27 as compared to Rs 2,22,863.61 crore for the corresponding quarter previous year.
- **Britannia Industries** has reported a 15.68% rise in its net profit at Rs 576.38 crore for the quarter ended June 30, 2026, as compared to Rs 498.27 crore for the same quarter in the previous year. Total income increased by 8.57% to Rs 4,892.90 crore for Q1FY27 as compared to Rs 4,506.85 crore for the corresponding quarter of the previous year.
- **Lupin** has reported a 27.56% rise in its net profit at Rs 2,714.60 crore for the quarter ended June 30, 2026, as compared to Rs 2,128.07 crore for the same quarter in the previous year. Total income increased by 26.23% to Rs 7,274.38 crore for Q1FY27 as compared to Rs 5,762.73 crore for the corresponding quarter of the previous year.
- **Premier Energies** has reported 22.29% rise in its net profit at Rs 28.69 crore for the quarter ended June 30, 2026 as compared to Rs 23.46 crore for the same quarter in the previous year.



NIFTY METAL
CLOSING: 13,189.85
CHANGE: +470.85
CHANGE: +3.70%



NIFTY REALTY
CLOSING: 885.95
CHANGE: -15.50
CHANGE: -1.72%

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