END DAY COMMENTARY

12th AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,154.25	78,263.33	78,263.33	77,497.93	77,966.35	-187.90	-0.24
NIFTY	24,471.70	24,472.45	24,473.30	24,265.95	24,435.95	-35.75	-0.15

INDICES SHUT THE DAY WITH MINOR LOSS

The 30-share BSE Sensex was down by 187.90 points or 0.24% to settle at 77,966.35 and the Nifty was down by 35.75 points or 0.15% to settle at 24,435.95. The BSE Small Cap 250 was down by 0.27% and BSE 500 was down by 0.17%. On the sectoral front, Capital Goods, Metal and Banks were gaining indices. On the flip side, Healthcare, IT, Oil & Gas, Realty, Consumer Durables, FMCG and Auto were losing indices. SBIN, Bharti Airtel, Ultratech Cement, Powergrid and Reliance were gainers on the Sensex; on the flip side, TCS, Mahindra & Mahindra, Tata Steel, Larsen & Toubro and Eternal 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
HINDALCO	1,078.5	1,049.1	2.80
BHARTIARTL	1,945.0	1,915.2	1.56
SBIN	1,082.0	1,066.0	1.50
JIOFIN	256.05	252.75	1.31
ULTRACEMCO	11,891	11,780	0.94

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TCS	2,349.7	2,445.7	-3.93
MAXHEALTH	1,007.5	1,040.0	-3.13
APOLLOHOSP	8,597.0	8,750.5	-1.75
M&M	3,403.6	3,460.1	-1.63
TATACONSUM	1,061.9	1,078.0	-1.49

Most Active (by value)

Name	Qty	Pr.	Value CR
BHARTIARTL	10871157	1,945.0	2,077.27
HDFCBANK	26993177	729.00	1,957.46
SBIN	17673922	1,082.0	1,907.71
TCS	7022647	2,349.7	1,644.09
ICICIBANK	8201733	1,431.7	1,169.31

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	36484049	186.20	676.56
HDFCBANK	26993177	729.00	1,957.4
TMPV	22384343	343.00	761.18
ETERNAL	19976751	314.05	628.97
SBIN	17673922	1,082.0	1,907.7

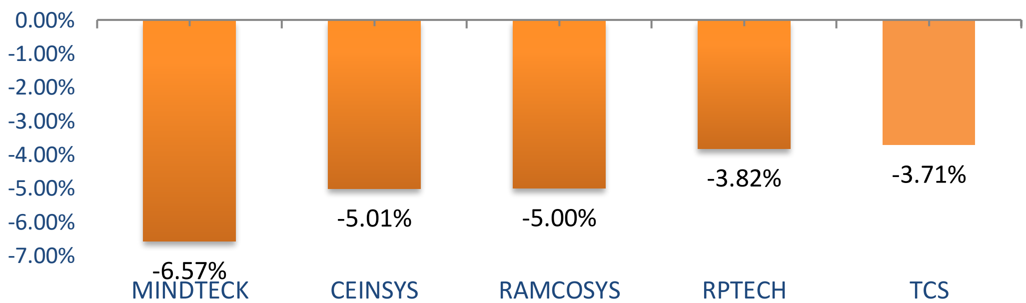
Indian equity markets ended in negative territory amid uncertainty about the reopening the Strait of Hormuz after Tehran indicated the Strait of Hormuz will not reopen until its conditions have been met. Investors also remained cautious ahead of CPI inflation data from the India and U.S., which could provide further clues on the future course of interest rates. However, markets erased most of their losses during the dying hours of the session, supported by continued buying activity from foreign institutional investors (FIIs), who purchased Indian equities worth Rs 258.55 crore on August 11. Traders paid no heed to the government's data showing that India's net direct tax collections rose by 23.09 per cent to over Rs 8.11 lakh crore as of August 10 in the current fiscal year (FY27). Traders overlooked SBI Research in its latest report stating that the country's Gross Domestic Product (GDP) growth is likely to rise to 8% in the first quarter of the current fiscal year (Q1FY27), higher than the Reserve Bank of India's (RBI) 7% growth projection.

On the global front, European markets were trading mostly higher, despite Germany's consumer prices grew 2.8 percent year-on-year in July, faster than the 2.3 percent increase seen in June. Asian markets ended mostly in green after Japan's machine tool order growth remained sharp in July, though the rate of increase eased since June. Source- AceEquity

NEWS BULLETIN

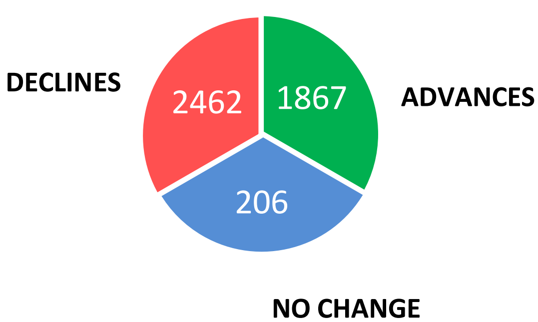
- **Bata India** has reported 23.38% rise in its net profit at Rs 63.79 crore for the quarter ended June 30, 2026, as compared to Rs 51.70 crore for the same quarter in the previous year. The total income increased by 3.97% to Rs 996.77 crore for Q1FY27 as compared to Rs 958.71 crore for the corresponding quarter of the previous year.
- **Marksans Pharma** has reported 43.65% jump in its net profit at Rs 69.04 crore for the quarter ended June 30, 2026 as compared to Rs 48.06 crore for the same quarter in the previous year.
- **MRF** has reported marginal fall of 2.04% in its net profit at Rs 474.37 crore for first quarter ended June 30, 2026 (Q1FY27) as compared to Rs 484.23 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 30,053.21
CHANGE: - 429.12
CHANGE: - 1.41%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.92

PE MULTIPLE OF NIFTY
20.62

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