END DAY COMMENTARY

18th AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,728.16	77,418.97	77,575.21	77,234.36	77,235.46	-492.70	-0.63
NIFTY	24,287.65	24,223.85	24,269.65	24,154.90	24,154.90	-132.75	-0.55

INDICES EXTENDED THEIR LOSSES

The 30-share BSE Sensex was down by 492.70 points or 0.63% to settle at 77,235.46 and the Nifty was down by 132.75 points or 0.55% to settle at 24,154.90. The BSE Small Cap 250 was up by 0.19% and BSE 500 was down by 0.43%. On the sectoral front, Healthcare and Auto were gaining indices. On the flip side, Realty, Capital Goods, Metal, Banks, IT, Consumer Durables, FMCG and Oil & Gas were losing indices. Axis Bank, Powergrid, Mahindra & Mahindra, Bajaj Finance and Larsen & Toubro were gainers on the Sensex; on the flip side, Asian Paint, Infosys, HCL Tech, Bharti Airtel and TCS were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
AXISBANK	1,243.0	1,227.3	1.28
MAXHEALTH	1,014.4	1,003.7	1.07
M&M	3,421.5	3,390.4	0.92
GRASIM	3,278.7	3,250.5	0.87
POWERGRID	268.00	266.15	0.70

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TMPV	322.80	330.20	-2.24
ASIANPAINT	2,628.4	2,687.5	-2.20
INFY	1,115.0	1,139.9	-2.18
WIPRO	178.06	181.90	-2.11
HCLTECH	1,298.0	1,325.0	-2.04

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	10180567	1,322.0	1,346.64
BHARTIARTL	6710275	1,934.2	1,304.63
HDFCBANK	17916507	723.00	1,298.39
ICICIBANK	8345198	1,412.0	1,177.32
INFY	8851110	1,115.0	988.47

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	18387007	315.90	584.56
HDFCBANK	17916507	723.00	1,298.3
ONGC	14903605	239.50	357.34
ITC	14561572	270.00	394.63
TATASTEEL	13393441	185.50	248.19

Indian equity markets remained under pressure on Tuesday, with the Sensex extending its losing streak to third session and the Nifty declining for the sixth consecutive session, amid persistent geopolitical uncertainty and elevated crude oil prices after the US-Iran ceasefire expired without a new agreement. Sentiments remained downbeat as Ind-Ra projected India's GDP growth to slow down to 6.8 per cent in the FY27, as against 7.6 per cent in the previous year. Some cautiousness also came as rating agency ICRA estimated India's GDP growth at a four-quarter low of 7% in the April-June quarter of the current fiscal, sliding from 7.8% in the March quarter of FY26, on a slower pace of expansion in the services sector. Traders overlooked Periodic Labour Force Survey (PLFS) conducted by the National Statistics Office (NSO) report showed overall unemployment rate among persons aged 15 years and above declined to 5.1 per cent in July 2026 from 5.5 per cent in the previous month.

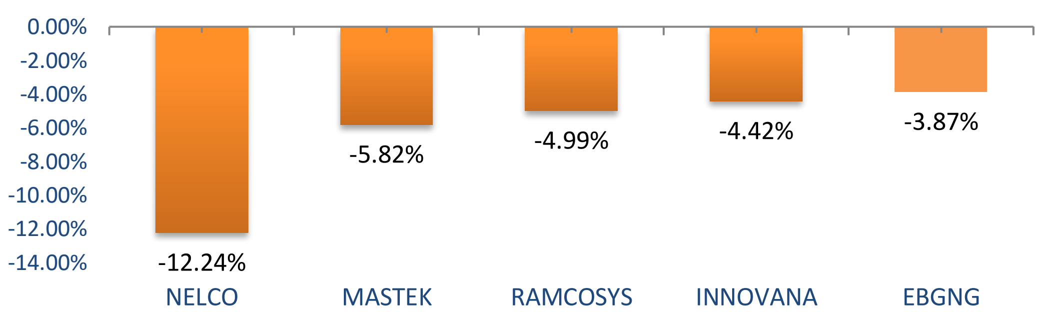
On the global front, European markets were trading in red, while Asian markets ended mostly lower amid escalating U.S.-Iran tensions. Sentiments weakened after U.S. President Donald Trump ruled out extending the temporary ceasefire agreement with Iran.

Source- AceEquity

NEWS BULLETIN

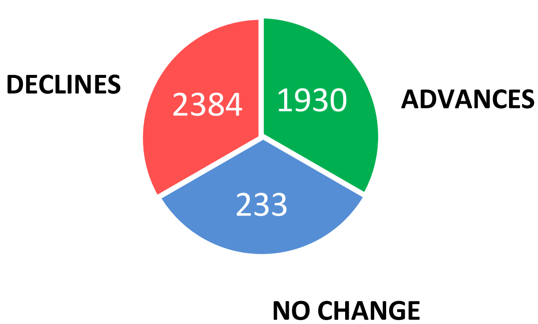
- **Airfloa Rail Technology** has received new order from Modern Coach Factory (MCF), Lalganj, Raebareli, for supply of luggage rack modules for L2CC. The total order value is Rs 70.56 lakh, and the order is scheduled for delivery by November 9, 2026.
- **INDO-MIM** has reported 23.48% rise in its net profit at Rs 223.17 crore for the quarter ended June 30, 2026 as compared to Rs 180.74 crore for the same quarter in the previous year.
- **Om Infra** has secured Letter of Award (LoA) for execution of a supplementary agreement covering repair work and 3 years of annual operation & maintenance (O&M) for 306 units. The repair work is to be completed by October 12, 2026, followed by 3 years of O&M.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 29,105.73
CHANGE: - 490.11
CHANGE: - 1.66%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.77	20.42

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