END DAY COMMENTARY

20th AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,909.68	77,468.45	77,611.11	77,371.00	77,537.72	+628.04	+0.82
NIFTY	24,078.30	24,225.45	24,265.15	24,184.55	24,231.85	+153.55	+0.64

INDICES IN GREEN AMID POSITIVE GLOBAL CUES

The 30-share BSE Sensex was up by 628.04 points or 0.82% to settle at 77,537.72 and the Nifty was up by 153.55 points or 0.64% to settle at 24,231.85. The BSE Small Cap 250 was up by 0.48% and BSE 500 was up by 0.63%. On the sectoral front, IT, Capital Goods, Realty, Metal, Banks, Auto, Healthcare, Consumer Durables, FMCG and Oil & Gas were gaining indices. On the flip side, there was no losing index. Eternal, Kotak Bank, ITC, Bajaj Finance and Axis Bank were gainers on the Sensex; on the flip side, Tata Steel, Indigo, HCL Tech and Titan 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 red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	327.95	320.00	2.48
SHRIRAMFIN	1,128.2	1,106.0	2.01
KOTAKBANK	397.35	390.25	1.82
ITC	271.65	267.05	1.72
BAJFINANCE	1,095.0	1,080.2	1.37

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TATACONSUM	1,056.3	1,068.0	-1.10
HINDALCO	1,029.8	1,038.9	-0.88
INDIGO	5,165.0	5,193.0	-0.54
NESTLEIND	1,458.0	1,465.0	-0.48
HCLTECH	1,318.4	1,324.8	-0.48

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	17603805	725.05	1,278.21
ETERNAL	36661268	327.95	1,198.93
ICICIBANK	8425049	1,411.9	1,186.73
INFY	8559841	1,130.0	970.84
BHARTIARTL	4390604	1,941.7	854.01

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	36661268	327.95	1,198.9
ITC	28272797	271.65	758.56
TATASTEEL	21782667	183.50	400.63
HDFCBANK	17603805	725.05	1,278.2
ONGC	11886277	238.50	281.91

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Indian equity markets snapped their losing streak on Thursday, buoyed by positive global cues and easing global bond yields following an announcement by the U.S. Treasury Department that it would buy back more longer-term debt, covering maturities of between 10 and 30 years in a bid to keep borrowing costs in check. However, gains were limited by high crude oil prices and continued tensions in West Asia. Traders took encouragement with report that India's Ambassador to the US Vinay Mohan Kwatra met US Assistant Secretary of State S Paul Kapur and discussed developments across various pillars of the bilateral partnership. Traders took note of the minutes of Reserve Bank of India's (RBI) Monetary Policy Committee (MPC) meeting showing that rate-setting panel was broadly agreed that rising food and fuel prices posed inflation risks, but there was limited evidence of broad-based price pressures, warranting a wait-and-watch approach, while voting for the status quo on interest rates.

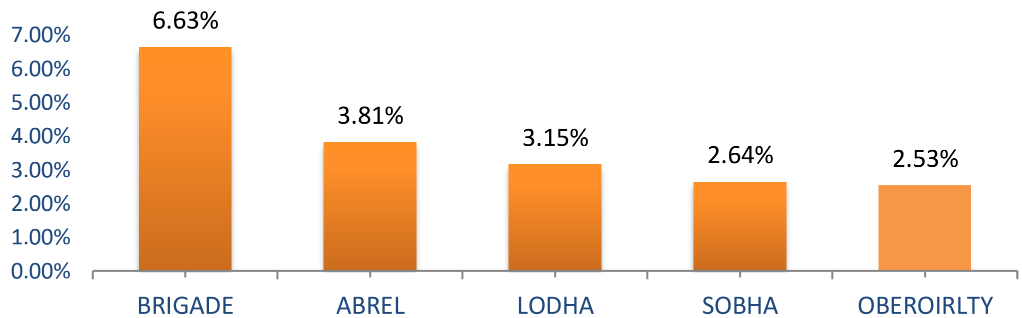
On the global front, European markets were trading in red amid persistent inflation concerns and heightened geopolitical uncertainty. Asian markets ended mostly higher, tracking positive cues from Wall Street overnight, as global bond yields eased from multi-year highs.

Source- AceEquity

NEWS BULLETIN

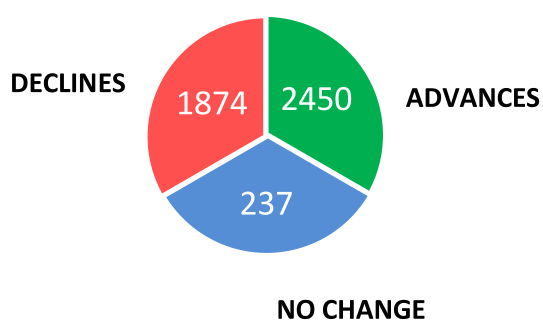
- **ITCONS E-Solutions** has secured a new contract worth around Rs 13.68 crore (inclusive of all taxes and duties) from South Western Railway, Indian Railways, Ministry of Railways. The contract is for providing 153 resources for a period of 2 years. The contract is scheduled to commence on August 21, 2026 and shall remain in force until August 21, 2028 unless extended further by mutual agreement between the parties.
- **Kernex Microsystems (India)** has bagged order worth Rs 31.87 crore (Including GST) from Integral Coach Factory, Chennai for the Supply, Installation, Testing and Commissioning of On-board KAVACH by the way of up gradation from version 3.2 to 4.0 which includes hardware and software. The said order is expected to be completed on or before March 31, 2027.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 7,094.56
CHANGE: +130.15
CHANGE: +1.87%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.12	20.49

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