END DAY COMMENTARY

21st AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,537.72	77,701.07	77,725.67	77,445.86	77,540.83	+3.11	+0.00
NIFTY	24,231.85	24,284.05	24,284.05	24,206.80	24,252.00	+20.15	+0.08

INDICES ENDED THE WEEK ON FLAT NOTE

The 30-share BSE Sensex ended on a flat note with 3.11 points or 0.00% to settle at 77,540.83 and the Nifty was up by 20.15 points or 0.08% to settle at 24,252.00. The BSE Small Cap 250 was up by 0.31% and BSE 500 was up by 0.02%. On the sectoral front, Capital Goods, Realty, Metal, Bank and Consumer Durables were the gaining indices. On the flip side, IT, Auto, Healthcare, FMCG and Oil & Gas were the losing indices. Powergrid, BEL, Kotak Bank, NTPC and Bajaj Finserv were gainers on the Sensex; on the flip side, Trent, Maruti, Indigo, HCL Tech and Hindustan Unilever 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
POWERGRID	272.40	264.80	2.87
HDFCLIFE	554.80	542.00	2.36
KOTAKBANK	402.80	397.35	1.37
NESTLEIND	1,477.1	1,458.0	1.31
BEL	414.00	409.40	1.12

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
MARUTI	13,565.0	13,809.0	-1.77
TRENT	2,924.0	2,970.0	-1.55
HCLTECH	1,302.5	1,318.4	-1.21
INDIGO	5,110.0	5,165.0	-1.06
ONGC	236.40	238.50	-0.88

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	26029811	726.95	1,901.2
ETERNAL	31651425	328.00	1,036.3
RELIANCE	5434871	1,316.0	712.62
INFY	6094967	1,121.0	686.31
SBIN	6534213	1,048.7	684.06

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	31651425	328.00	1,036.3
TATASTEEL	26299054	183.00	481.82
HDFCBANK	26029811	726.95	1,901.2
POWERGRID	18031357	272.40	490.13
KOTAKBANK	15670257	402.80	631.24

Indian equity benchmarks managed to keep their heads above water on Friday, as a survey showed that India's private-sector activity edged slightly higher in August from a more than four-year low, with a rebound in services growth offsetting the weakest expansion in the manufacturing sector in half a decade. Meanwhile, markets remained volatile throughout the day, weighed down by a rebound in U.S. Treasury yields, elevated crude oil prices, and persistent geopolitical uncertainty.

Both the Sensex and Nifty remained range-bound and ended marginally higher, tracking positive cues from other Asian markets. Nine key infrastructure sectors' output growth rises 5.4% in July: Some support came as India's production growth of nine key infrastructure sectors rose to 5.4 per cent in July following an increase in output of coal, refinery products, cement, electricity and iron ore.

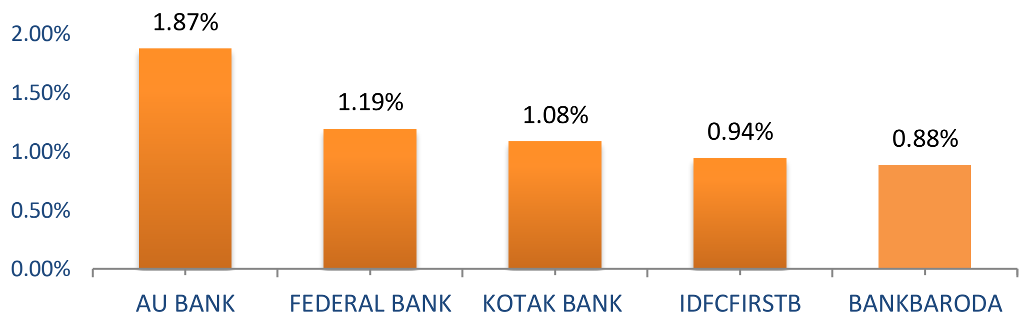
On the global front: European markets were trading mostly in green, supported by gains in technology and utility stocks. Asian markets ended mostly higher, despite weak cues from Wall Street overnight.

Source- AceEquity

NEWS BULLETIN

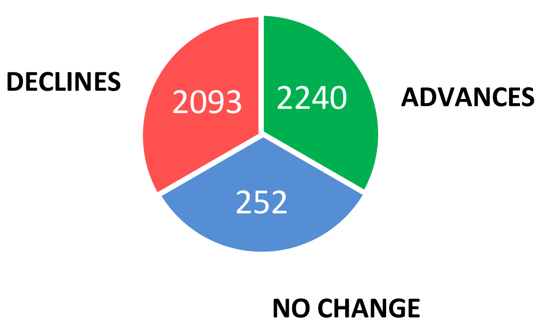
- **Zydus Lifesciences** has received final approval from the United States Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Ascorbic Acid Injection USP, 25,000 mg/50 mL (500 mg/mL), 5,000 mg/10 mL (500 mg/mL).
- **Data Patterns (India)** has secured order worth around Rs 585.76 crore from M/s. Bharat Electronics. The order is for supply of Radar Electronics.
- **Ceigall India** has received a Letter of Award (LoA) from Himachal Pradesh State Industrial Development Corporation (HPSIDC) for the Rs 225 crore development of the Bulk Drug Park at Una, Himachal Pradesh.

MARKET DRIVING SECTOR : BANK



S&P BSE: BANK
CLOSING: 65,368.80
CHANGE: +258.20
CHANGE: +0.40%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.12	20.50

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