END DAY COMMENTARY

24th AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,540.83	77,629.56	77,789.40	77,201.66	77,369.11	-171.72	-0.22
NIFTY	24,252.00	24,285.05	24,313.00	24,144.30	24,219.05	-32.95	-0.14

INDICES CLOSE THE DAY WITH MINOR LOSS

The 30-share BSE Sensex was down by 171.72 points or 0.22% to settle at 77,369.11 and the Nifty was down by 32.95 points or 0.14% to settle at 24,219.05. The BSE Small Cap 250 was down by 0.17% and BSE 500 was down by 0.12%. On the sectoral front, IT, Realty, Metal, Healthcare, FMCG and Oil & Gas were gaining indices. On the flip side, Consumer Durables, Capital Goods, Banks and Auto were losing indices. Tata Steel, HCL Tech, Infosys, Hindustan Unilever and Sunpharma were gainers on the Sensex; on the flip side, Bajaj Finserv, Adani Ports, BEL, Bajaj Finance and Trent 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 green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
JSWSTEEL	1,327.0	1,293.7	2.57
HINDALCO	1,058.5	1,034.0	2.37
TATASTEEL	186.30	183.00	1.80
HCLTECH	1,322.0	1,302.5	1.50
DRREDDY	1,190.0	1,174.7	1.30

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
SBILIFE	1,761.8	1,792.9	-1.73
BAJFINANCE	1,077.0	1,095.0	-1.64
ADANIPORTS	1,672.1	1,700.0	-1.64
BAJAJFINSV	2,001.7	2,032.5	-1.52
BEL	409.00	414.00	-1.21

Most Active (by value)

Name	Qty	Pr.	Value CR
INFY	8565354	1,130.0	970.59
RELIANCE	7277167	1,309.8	951.78
SBIN	8868193	1,039.5	919.02
HDFCBANK	11408345	729.00	830.52
ICICIBANK	5307113	1,415.0	751.26

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	37800944	186.30	700.00
ETERNAL	21892944	327.15	717.76
KOTAKBANK	14932117	401.45	598.91
HDFCBANK	11408345	729.00	830.52
BEL	9480784	409.00	387.62

Indian equity benchmarks ended lower on Monday, tracking broadly weak cues from Asian markets as investors remained cautious ahead of expected new U.S. sanctions on Iran, which could further disrupt supplies from the Middle East. Sentiments were also weighed down by elevated crude oil prices and continued geopolitical uncertainty. Traders overlooked the report stated that India is enhancing its focus on South America as part of its trade diversification strategy, particularly Chile, Argentina, and Brazil, which present significant export opportunities and are expected to strengthen trade ties during Commerce Secretary Rajesh Agrawal's visit from August 24 to 28. Traders paid no heed to reports that India and Brazil have signed Memorandum of Understanding (MoU) to deepen bilateral cooperation in telecommunications and Information and Communication Technologies (ICTs). Sentiments were weak as Foreign Institutional Investors (FIIs) remained net sellers for the second straight session on August 21, 2026, offloading Indian equities worth Rs 542.71 crore.

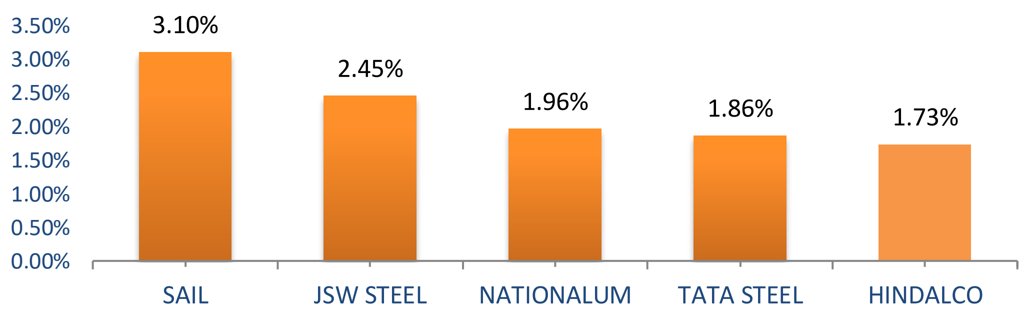
On the global front, European markets were trading mostly in green, ahead of Nvidia’s earnings update. Asian markets ended in red, as elevated global bond yields weighed on investor sentiment.

Source- AceEquity

NEWS BULLETIN

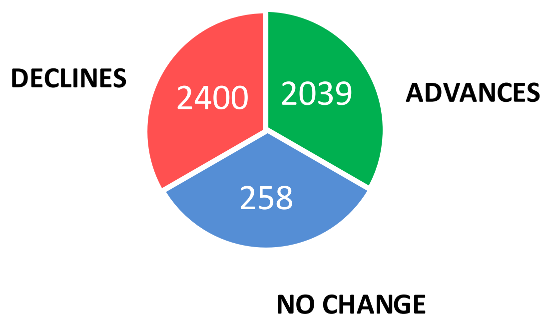
- **Garden Reach Shipbuilders & Engineers** has received order from West Bengal Tourism Development Corporation (WBTDCL) on August 24, 2026 for ‘Procurement of 2 nos. 100Pax Electric Ferry’ at a contract price of Rs 45.02 crore. The order is to be completed within 18 months from the date of signing of contract.
- **Dhabriya Polywood** has secured a work order/LOI worth Rs 4.78 crore (including GST) from Godrej Properties. The order is for External Facade Works. The project is scheduled to be completed by 12 months, in various tranches as per the terms of the order.
- **Monarch Surveyors and Engineering Consultants** has received a work order from Fursungi-Uruli Devachi Nagar Parishad. The total order value of the project is Rs 1.68 crore.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 42,373.22
CHANGE: +577.58
CHANGE: +1.38%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.84	20.47