END DAY COMMENTARY

25th AUGUST 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,369.11	77,295.49	77,666.39	77,125.91	77,656.09	+ 286.98	+0.37
NIFTY	24,219.05	24,175.75	24,334.55	24,115.45	24,334.55	+ 115.50	+0.48

INDICES ENDED THE DAY ON FLAT NOTE

The 30-share BSE Sensex was up by 286.98 points or 0.37% to settle at 77,656.09 and the Nifty was up by 115.50 points or 0.48% to settle at 24,334.55. The BSE Small Cap 250 was down by 0.17% and BSE 500 was up by 0.36%. On the sectoral front, Realty, FMCG, Auto, HealthCare, Capital Goods, IT, Metal, Oil & Gas, Bank and Consumer Durables were the gaining indices. On the flip side, there was no losing index. Indigo, Adani Ports, Infosys, Trent and Titan were gainers on the Sensex; on the flip side, Eternal, HCL Tech, Powergrid, Bajaj Finserve and HDFC Bank 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
ADANIENT	3,110.0	2,998.6	3.72
MAXHEALTH	1,016.0	990.50	2.57
APOLLOHOSP	8,889.0	8,702.0	2.15
INDIGO	5,218.0	5,115.0	2.01
ADANIPORTS	1,702.7	1,672.1	1.83

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HDFCLIFE	546.70	552.95	-1.13
CIPLA	1,422.0	1,437.9	-1.11
ONGC	234.00	236.55	-1.08
COALINDIA	404.00	406.90	-0.71
HINDALCO	1,051.0	1,058.5	-0.70

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	17511874	727.50	1,269.7
ICICIBANK	7983249	1,422.7	1,133.9
SBIN	9982723	1,048.0	1,038.7
ETERNAL	29062006	331.00	956.78
RELIANCE	7115355	1,317.0	929.19

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	29062006	331.00	956.78
TATASTEEL	24578020	186.94	453.83
HDFCBANK	17511874	727.50	1,269.7
ONGC	12124076	234.00	284.33
TMPV	10984458	314.25	343.42

Indian equity benchmarks erased their intraday losses and settled higher on Tuesday, supported by a decline in crude oil prices and positive cues from other Asian markets. Markets made a cautious start and traded below the neutral lines amid heightened geopolitical tensions between the U.S. and Iran. Meanwhile, IT stocks remained in focus following reports that the U.S. Department of Homeland Security (DHS) proposed a $103,265 fee for H-1B cap-subject petitions. Traders took some support with India and Mauritius have discussed ways to further strengthen cooperation in public service, training and capacity building, with greater emphasis on sustained institutional engagement and exchange of expertise between the two countries.

Traders took note of report that External Affairs Minister S Jaishankar held wide-ranging talks with his Russian counterpart Sergey Lavrov, with the two leaders discussing bilateral cooperation, global challenges and multilateral issues.

On the global front: European markets were trading mostly in green, as investor sentiment improved and the recent sell-off in global technology stocks eased. Asian markets ended mostly higher, despite largely weak cues from the US markets overnight. Source- Ace Equity

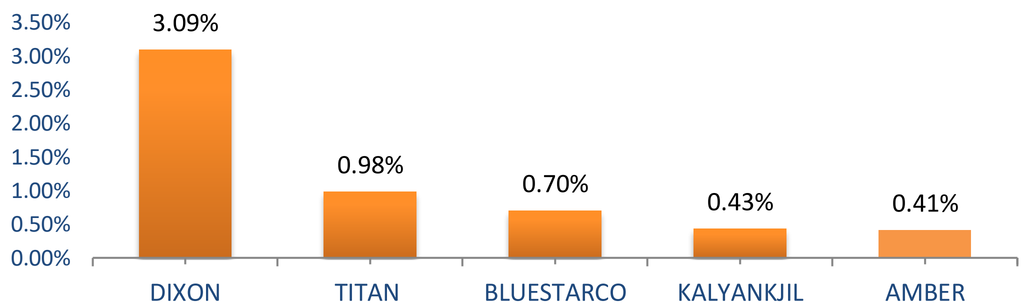
NEWS BULLETIN

- **NBCC (India)** has successfully sold 111 residential units at Aspire Silicon City, (1 tower: Tower No.6) at Noida, UP through an e-auction at total sale value of approximately Rs 416.53 crore. The company will receive 1% of the sale value as a marketing fee.

- **VA Tech Wabag** has signed the 'Mega' contract for the Doha SWRO Desalination Plant with Recarbonation System-Stage II in Kuwait. This order was awarded in June 2026 by the Ministry of Electricity, Water & Renewable Energy, Kuwait, and the execution of the contract now formally paves the way for the project to commence

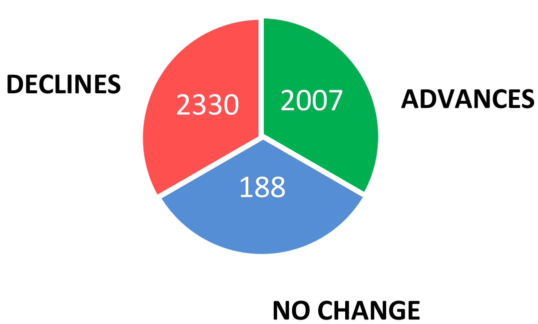
- **Suzlon has** secured a new 250 MW wind order from Torrent Green Energy, a Torrent Group company. Under the project, Suzlon will supply 76 flagship S144 wind turbines (3.3 MW each) along with grid integration and long -term O&M (AMS) services.

MARKET DRIVING SECTOR : CONSUMER DURABLES



S&P BSE: CONSUMER DURABLES
CLOSING: 65,539.22
CHANGE: +528.63
CHANGE: +0.81%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.13	20.57

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