END DAY COMMENTARY

26th AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,656.09	77,892.10	77,986.84	77,472.94	77,472.94	-183.15	-0.24
NIFTY	24,334.55	24,341.95	24,378.60	24,207.75	24,207.75	-126.28	-0.52

INDICES CLOSED THE DAY WITH MODERATE LOSS

The 30-share BSE Sensex was down by 183.15 points or 0.24% to settle at 77,472.94 and the Nifty was down by 126.28 points or 0.52% to settle at 24,207.75. The BSE Small Cap 250 was up by 0.56% and BSE 500 was down by 0.03%. On the sectoral front, Metal, Healthcare and Banks were gaining indices. On the flip side, IT, Realty, Consumer Durables, Capital Goods, FMCG, Oil & Gas, and Auto were losing indices. Kotak Bank, Ultratech Cement, Axis Bank, Tata Steel and Bajaj Finserv were gainers on the Sensex; on the flip side, Infosys, Bharti Airtel, Larsen & Toubro, Powergrid and Tech Mahindra 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
KOTAKBANK	416.70	401.60	3.76
AXISBANK	1,255.0	1,235.0	1.62
JSWSTEEL	1,341.0	1,320.3	1.57
ULTRACEMCO	11,717	11,540	1.53
HDFCLIFE	553.00	546.70	1.15

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BHARTIARTL	1,902.1	1,947.0	-2.31
POWERGRID	265.20	271.00	-2.14
INFY	1,120.0	1,144.0	-2.10
LT	4,038.1	4,119.0	-1.96
NESTLEIND	1,451.5	1,479.0	-1.86

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	21156463	727.20	1,539.11
ETERNAL	39246846	327.00	1,286.43
BHARTIARTL	4552921	1,902.1	874.37
KOTAKBANK	20168995	416.70	832.78
RELIANCE	5744474	1,298.00	750.03

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	39246846	327.00	1,286.4
TATASTEEL	32199274	188.01	600.90
HDFCBANK	21156463	727.20	1,539.1
KOTAKBANK	20168995	416.70	832.78
ITC	11693367	270.25	317.86

Indian equity benchmarks gave up their early gains and settled lower on Wednesday, despite a decline in crude oil prices and a positive trend in global markets. Investors remained cautious ahead of the release of US inflation data later in the day, which could offer fresh clues about the Federal Reserve's interest-rate trajectory. Traders paid no head to the former Chief Economic Adviser Krishnamurthy V Subramanian's statement that India can build a $55 trillion economy by 2047 by capitalising on its young demographic in artificial intelligence and dominating key sunrise sectors. Traders took note of report that the 'State of the Economy' article featured in the Reserve Bank of India's (RBI) August 2026 Bulletin stated that the global economy is confronting a fragile geopolitical environment and continuing trade-related uncertainties. Nevertheless, the domestic economy has demonstrated notable resilience to the ongoing global headwinds, characterised by buoyant domestic demand, and rising manufacturing and services activity.

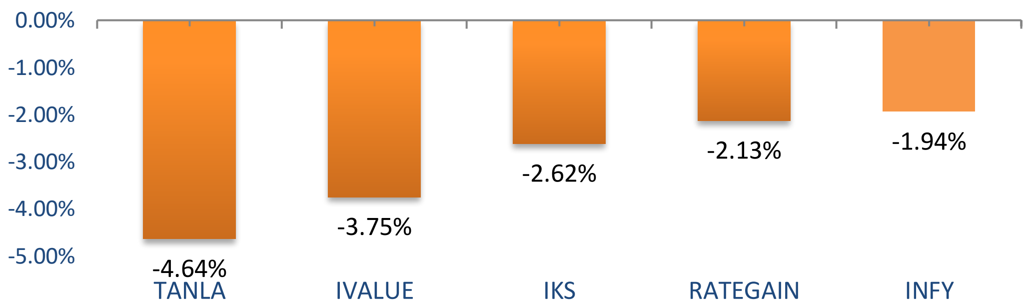
On the global front, European markets were trading mostly in green, amid decline in global crude oil prices as well as an easing in sovereign bond yields in Europe.

Source- AceEquity

NEWS BULLETIN

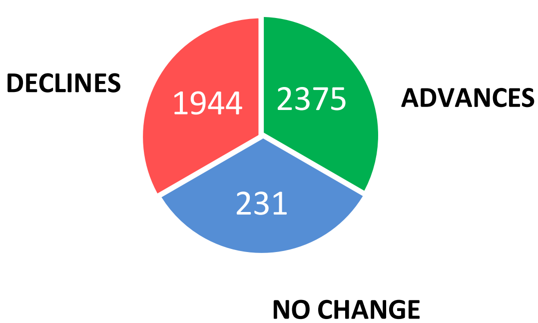
- **Adani Energy Solutions** has won a key transmission project for evacuation of renewable energy generated in Karnataka to major load centres in Maharashtra. The project, which entails an estimated capital expenditure of around Rs 4,700 crore.
- **DMR Engineering** has received a work order from Ta Dam Energy Consulting Co. for Engineering Consultancy Services for Hydropower Project in Lao PDR. The contract period of the work is 12 months for an aggregate amount of $2,00,000.
- **Relicab Cable Manufacturing** has secured contract worth around Rs 8.26 crore (including GST) from one of the world's leading energy technology companies operating in India. The order is for supply of Control Cables and scheduled for delivery on or before September 30, 2026.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 29,183.14
CHANGE: -308.73
CHANGE: -1.05%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO
0.90

PE MULTIPLE OF NIFTY
20.46

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