WEEKLY COMMENTARY

29 AUG 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,540.83	77,629.56	77,986.84	76,933.59	77,264.51	-276.32	-0.36
NIFTY 50	24,252.00	24,285.05	24,378.60	24,076.85	24,175.65	-76.35	-0.31

INDICES CLOSED THE WEEK ON A CAUTIOUS NOTE

Indian equity benchmark ended on a red note in the week ended 29 Aug, 2026. Key indices were positive in two out of five sessions of the week. The S&P BSE Sensex was down by 276.32 points or 0.36% to settle at 77,264.51 in the week ended 29 Aug, 2026. The CNX Nifty was down by 76.35 points or 0.31% to settle at 24,175.65. The BSE 500 index was down by 20.18 or 0.05% to settle at 36,794.03. The BSE Small-Cap index was up by 37.02 points or 0.51% to settle at 7,279.53.

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ADANI ENTERPRISE	3,168.5	2,997.0	5.72
KOTAK BANK	423.70	402.80	5.19
TECH MAHINDRA	1,640.9	1,584.0	3.59
JSW STEEL	1,334.9	1,293.7	3.18
INFOSYS LTD	1,144.0	1,121.0	2.05

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAM FINANCE	1086.9	1,130.0	-3.81
BHARTI AIRTEL	1,882.4	1,946.0	-3.27
NTPC LTD	330.05	340.00	-2.93
POWER GRID	266.05	272.40	-2.33
JIO FINANCIAL	238.40	244.00	-2.30

Most Active (by value)

Name	Avg Value	Pr.	Qty
HDFC BANK	8,145.58	720.30	1130860.00
ICICI BANK	5,354.41	1,422.80	376328.80
ETERNAL LTD	5,132.05	328.00	1564648.00
RELIANCE	4,921.32	1,287.00	382387.20
BHARTI AIRTEL	4,802.79	1,882.40	255141.70

Most Active (by volume)

Name	Avg Value	Pr.	Qty
TATA STEEL	3,261.33	186.50	1748704.64
ETERNAL LTD	5,132.05	328.00	1564648.00
HDFC BANK	8,145.58	720.30	1130860.00
KOTAK BANK	4,115.09	423.70	971228.40
COAL INDIA	2,586.65	401.00	645049.80

INSTITUTIONAL NET POSITION

FIIs Cash	-2,060.24
FIIs Index Future	-6,018.02
FIIs Stock Future	-390.54
DIIs Cash	+19,309.93

On Monday, 24 Aug, 2026, Key benchmark indices ended lower. The S&P BSE Sensex declined 171.72 points or 0.22% to 77,369.11. On Tuesday, 25 Aug, 2026, Domestic equity indices ended higher after a volatile session. The S&P BSE Sensex rose 286.98 points, or 0.37%, to 77,656.09. On Wednesday, 26 Aug, 2026, equity indices ended lower as investors booked profits at higher levels. the S&P BSE Sensex declined 183.15 points, or 0.24%, to 77,472.94. On Thursday, 27 Aug, 2026, Key benchmark indices extended their losses for the second consecutive session. The S&P BSE Sensex declined 539.35 points or 0.70% to 76,933.59. On Friday, 28 Aug, 2026, Key equity benchmarks rebounded & snapping a two-session losing streak. The S&P BSE Sensex advanced 330.92 points, or 0.43% to 77,264.51.

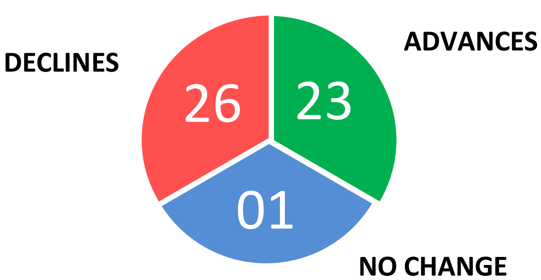
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended the volatile week lower amid geopolitical tensions, elevated crude oil prices, US inflation concerns and expiry-related volatility. Markets recovered on Tuesday but declined over the next two sessions due to profit booking and selling in heavyweight stocks. A sharp rally in IT stocks following upbeat Nvidia results, along with gains in pharma and metal shares, supported Friday's rebound..

MARKET WATCH- COMING WEEK

Indian equities are likely to remain cautious, with focus on India's Q1 FY27 GDP data, August PMI readings, monthly automobile sales and FII flows. Globally, investors will track US non-farm payrolls for cues on the Federal Reserve's interest-rate path, along with crude oil prices and geopolitical developments. The Nifty's ability to hold the crucial 24,000 level will determine the near-term trend, while stock-specific opportunities may continue in the broader market.

NIFTY MARKET BREADTH (W) - NEGATIVE

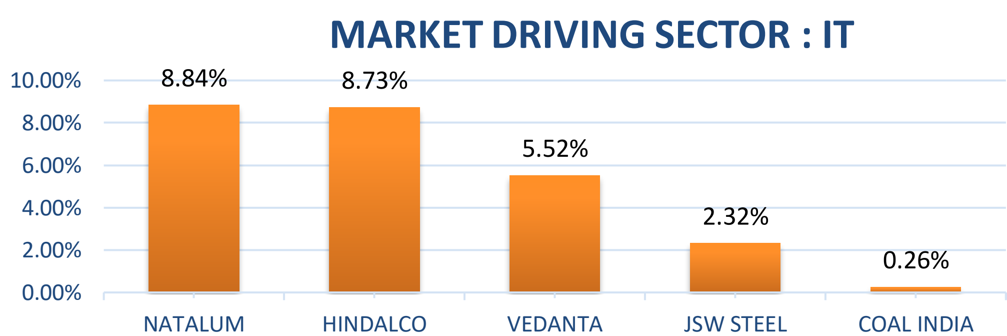


RATIO ANALYSIS

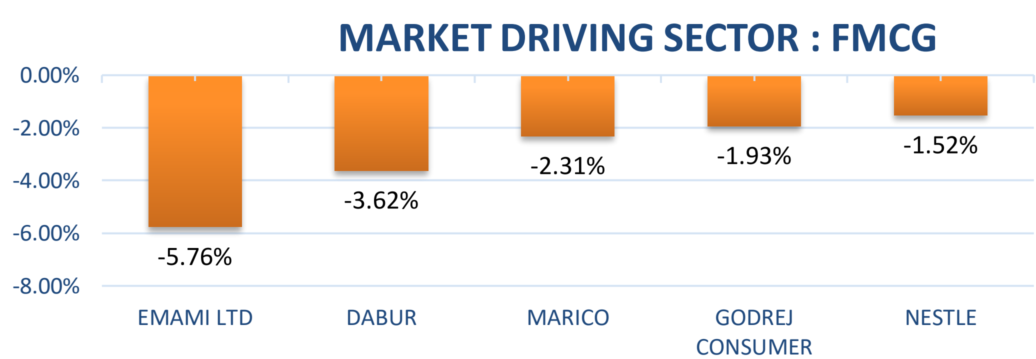
PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.89	20.44

NEWS BULLETIN

- **Expo Engineering and Projects** has received a work order from M/s Bharat Petroleum Corporation (BPCL), Mumbai Refinery, valued at Rs 3.62 crore (inclusive of taxes). The order is for tank fabrication works for SAF Project at Mumbai Refinery. The order is scheduled to be completed within 10 months from the date of Purchase Order (PO).
- **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. This sixth order from Torrent takes the cumulative partnership between the two companies to over 1. 3 GW across three key states - Gujarat, Karnataka, and Madhya Pradesh. With this, the company has secured 1.1 GW of new orders in FY27.
- **Krystal Integrated Services** has received a work order worth around Rs 17.25 crore (excluding all applicable taxes) from The Maharashtra Rajya Sahakari Sangh Maryadit, Pune. The work order is for providing Manpower services in various districts of Maharashtra state. The order is for a period of 5 years (from September 01, 2026 to August 31, 2031).



NIFTY IT
CLOSING: 31,281.70
CHANGE: + 749.45
CHANGE: + 2.45%



NIFTY FMCG
CLOSING: 46,815.00
CHANGE: - 695.95
CHANGE: - 1.46%

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