END DAY COMMENTARY

31st AUG 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,264.51	77,130.73	77,177.27	76,751.32	76,957.27	-307.24	-0.40
NIFTY	24,175.65	24,117.55	24,128.70	23,993.60	24,080.40	-95.25	-0.39

INDICES ENDED ON A VOLATILE NOTE AMID GLOBAL CUES

The 30-share BSE Sensex was down by 307.24 points or 0.40% to settle at 76,957.27 and the Nifty was down by 95.25 points or 0.39% to settle at 24,080.40. The BSE Small Cap 250 was down by 0.74% and BSE 500 was down by 0.48%. On the sectoral front, Banks and Auto were the gaining indices. On the flip side, Capital Goods, Consumer Durables, Healthcare, Metal, Realty, IT, FMCG and Oil & Gas were the losing indices. Sun Pharma, Axis Bank, ICICI Bank, SBIN and Bajaj Finserv were gainers on the Sensex; on the flip side, Adani Ports, ITC, Bharti Airtel, HDFC Bank and Infosys 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 red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SUNPHARMA	1,984.8	1,920.0	3.38
NESTLEIND	1,496.5	1,454.6	2.88
AXISBANK	1,300.0	1,265.0	2.77
MAXHEALTH	1,042.1	1,014.1	2.76
GRASIM	3,371.0	3,290.0	2.46

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,859.1	3,168.5	-9.76
ADANIPORTS	1,593.1	1,707.5	-6.70
ITC	255.50	266.00	-3.95
BHARTIARTL	1,811.9	1,882.4	-3.75
TMPV	308.85	319.40	-3.30

Most Active (by value)

Name	Qty	Pr.	Value CR
ETERNAL	272151922	328.10	8,897.7
HDFCBANK	78157067	709.00	5,634.3
RELIANCE	34871137	1,277.0	4,458.0
ADANIENT	12872435	2,859.1	3,756.1
BHARTIARTL	16921326	1,811.9	3,126.4

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	272151922	328.10	8,897.7
HDFCBANK	78157067	709.00	5,634.3
TATASTEEL	36802869	184.35	671.84
RELIANCE	34871137	1,277.0	4,458.0
ITC	24575845	255.50	644.62

Indian equity benchmarks ended in negative territory on Monday, reversing the gains recorded in the previous session, amid escalating tensions in West Asia after the United States launched an attack on an Iranian island in the Strait of Hormuz. Sentiments remained cautious as investors awaited the release of India's Q1 FY27 GDP data.

Both the Sensex and Nifty ended lower on Monday, weighed down by heavy selling pressure in heavyweight stocks. Persistent foreign fund outflows, coupled with renewed concerns over a potential interest rate hike by the US Federal Reserve, further dented investor sentiment. Meanwhile, Adani Group stocks were among the biggest laggards across both markets.

On the global front: European markets were trading in red, amid escalating tensions between Washington and Tehran around the Strait of Hormuz. Asian markets ended mixed, as hawkish remarks from Fed Chair Kevin Warsh at Jackson Hole, amid mounting concerns over rising inflation risks, dampened investors' appetite for risk.

Source- AceEquity

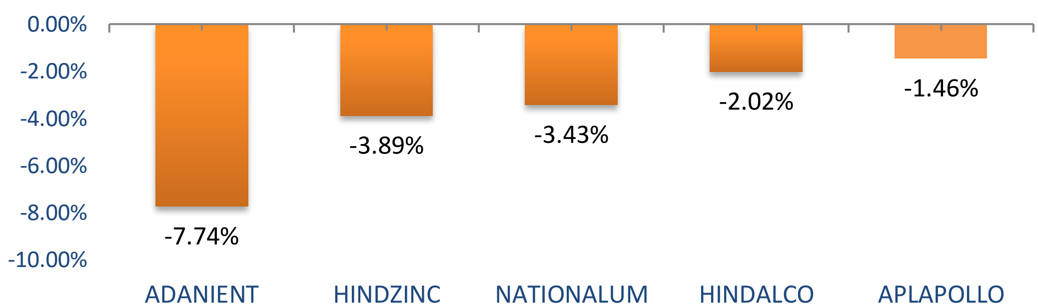
NEWS BULLETIN

- **Aurobindo Pharma's step-down subsidiary -- Lannett Company LLC** has launched the generic equivalent of Advair Diskus (fluticasone propionate and salmeterol inhalation powder), a product of GSK plc, in 100/50 mcg and 250/50 mcg strengths, in the US market.

- **Tata Power Company's subsidiary -- Tata Power Renewable Energy (TPREL)** has successfully commissioned its 100 MW Group Captive Solar Project (TNGC-2) at Vellalankottai and Nalandhula villages in Kayathar, Tamil Nadu.

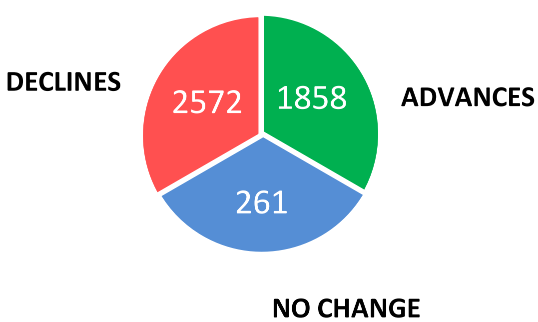
- **Bharti Airtel** has added 26.88 lakh customers in July 2026. Following this, the company's total customer base has increased to 48.94 crore with market share of 38.01% in terms of wireless (Mobile) subscribers as on July 31, 2026.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 41,930.97
CHANGE: -1,038.38
CHANGE: -2.42%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.91	20.35

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