END DAY COMMENTARY

01st SEP 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,957.27	76,994.11	77,231.87	76,656.12	76,944.28	-12.99	-0.02
NIFTY	24,080.40	24,077.55	24,143.15	23,952.55	24,055.80	-24.60	-0.01

INDICES CLOSED ON A FLAT NOTE

The 30-share BSE Sensex was down by 12.99 points or 0.02% to settle at 76,944.28 and the Nifty was down by 24.60 points or 0.01% to settle at 24,055.80. The BSE Small Cap 250 was up by 0.04% and BSE 500 was down by 0.30%. On the sectoral front, IT, FMCG and Oil & Gas were gaining indices. On the flip side, Auto, Consumer Durables, Capital Goods, Healthcare, Banks, Realty and Metal were losing indices. ITC, HCL Tech, Infosys, Bharti Airtel and Reliance were gainers on the Sensex; on the flip side, Maruti, SBIN, Indigo, Bajaj Finserv and Mahindra & Mahindra were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a negative note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ITC	266.60	255.50	4.34
BHARTIARTL	1,877.2	1,811.9	3.60
ADANIPORTS	1,647.5	1,593.1	3.41
HCLTECH	1,351.4	1,312.2	2.99
RELIANCE	1,309.0	1,277.0	2.51

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAMFIN	1,059.1	1,109.9	-4.58
MARUTI	12,950	13,547	-4.41
NESTLEIND	1,438.2	1,496.5	-3.90
MAXHEALTH	1,003.0	1,042.1	-3.75
INDIGO	5,052.0	5,234.0	-3.48

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	44417092	711.90	3,144.20
BHARTIARTL	9900740	1,877.2	1,846.79
RELIANCE	12617528	1,309.0	1,639.93
INFY	13516123	1,156.0	1,548.14
ICICIBANK	10627608	1,438.0	1,522.62

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	46663321	184.07	861.78
HDFCBANK	44417092	711.90	3,144.2
ITC	31258553	266.60	830.48
ETERNAL	21501682	327.75	702.35
INFY	13516123	1,156.0	1,548.1

Indian equity benchmarks reversed intraday gains and ended lower on Tuesday, pressured by a surge in crude oil prices amid renewed escalation in West Asia tensions. The decline came despite stronger-than-expected domestic growth data, with investors assessing the latest PMI data for cues on economic growth and business activity. Traders remained cautious as HSBC India Manufacturing Purchasing Managers' Index (PMI) survey released showed India's manufacturing activity expanded at its weakest pace in five years in August as growth in output and new orders slowed amid softer demand conditions. The seasonally adjusted index fell to 52.8 in August from 53.5 in July, marking its third consecutive monthly decline. Traders overlooked that India's economy grew 7.8% in the April-June quarter of 2026-27, beating the RBI's 7% projection.

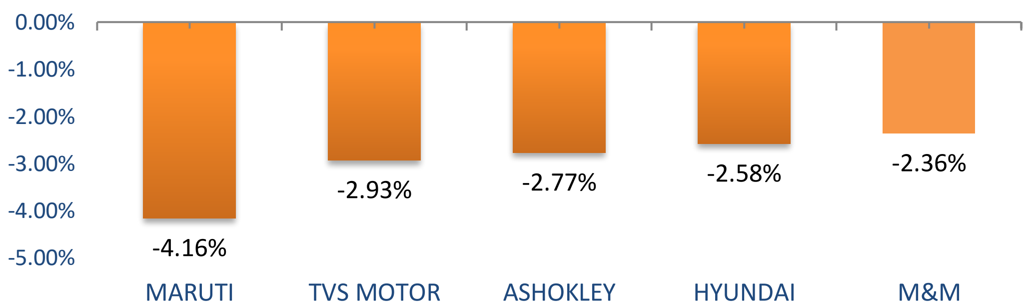
On the global front, European markets were trading in red, amid rising concerns over Fed policy and escalating U.S.-Iran tensions. Asian markets ended mostly in red, following the broadly negative cues from Wall Street overnight.

Source- AceEquity

NEWS BULLETIN

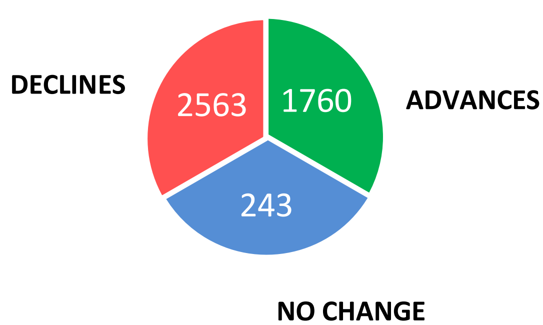
- **Tata Motors** has reported total commercial vehicle sales of 44,411 units across domestic and international markets in August 2026, registering a 49% year-on-year growth compared to 29,863 units sold in August 2025.
- **HFCL**, through its overseas wholly owned subsidiary, has entered into a three-year supply agreement with a global multinational corporation for the supply of high-quality, high-fibre-count Optical Fiber Cables. The total value of the contract over its tenure is estimated at around $244 million equivalent to around Rs 2329 crore. The contract is valid till December 2029.
- **VST Tillers Tractors** has sold a total of 3,720 units during August 2026 as compared to 4,499 units in August 2025, a decline of 17.32%. Of the total, the company has sold 3,387 power tillers in August 2026 as against 4,100 units in August 2025.

MARKET DRIVING SECTOR : AUTO



S&P BSE: AUTO
CLOSING: 62,864.67
CHANGE: -896.94
CHANGE: -1.41%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.88	20.34

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