END DAY COMMENTARY

2nd SEPT 2026

Hem Securities
Building your wealth through values

BROKING | INVESTMENT BANKING | RESEARCH | DISTRIBUTION | DEPOSITORY|PMS

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,944.28	76,471.32	76,570.35	76,135.72	76,570.35	-373.93	-0.49
NIFTY	24,055.80	23,858.00	23,914.45	23,786.80	23,914.45	-141.35	-0.59

INDICES IN RED AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was down by 373.93 points or 0.49% to settle at 76,570.35 and the Nifty was down by 141.35 points or 0.59% to settle at 23,914.45. The BSE Small Cap 250 was down by 0.51% and BSE 500 was down by 0.44%. On the sectoral front, Metal, Realty and Oil & Gas were gaining indices. On the flip side, Banks, Capital Goods, Auto, Consumer Durables, Healthcare, FMCG and IT were the losing indices. Adani Ports, Bajaj Finserv, PowerGrid, NTPC and Titan were gainers on the Sensex; on the flip side, Asian Paints, HDFC Bank, M&M, HCL Tech and BEL were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
COALINDIA	417.85	401.60	4.05
NTPC	330.00	327.50	1.85
ADANIPORTS	1,672.7	1,647.5	1.53
ADANIENT	2,891.8	2,863.9	0.97
BAJAJFINSV	1,990.0	1,972.0	0.91

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
EICHERMOT	7,711.5	7,970.0	-3.24
WIPRO	177.09	181.70	-2.54
M&M	3,190.0	3,259.0	-2.12
BAJAJ-AUTO	12,130.0	12,361.0	-1.87
ASIANPAINT	2,527.5	2,575.5	-1.86

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	36950338	700.80	2,594.6
RELIANCE	13497841	1,313.1	1,766.8
COALINDIA	34130970	417.85	1,423.7
SBIN	13843678	1,020.9	1,415.5
ICICIBANK	8515824	1,426.5	1,214.6

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	36950338	700.80	2,594.6
COALINDIA	34130970	417.85	1,423.7
ETERNAL	20138975	327.30	654.09
TATASTEEL	19496175	183.85	356.60
JIOFIN	15926208	236.90	374.95

Indian equity benchmarks came under selling pressure and ended lower on Wednesday, as the escalating US-Iran conflict pushed crude oil prices and Treasury yields higher, while growing concerns over prolonged supply disruptions through the Strait of Hormuz weighed on investor sentiment.

Auto stocks emerged as the worst-performing sector, while select IT stocks and heavyweight counters also weighed on the indices.

Traders took note of reports that the government of India has raised the rate of special additional excise duty (SAED) along with road and infrastructure cess on export of diesel to Rs 25 per litre from Rs 24 a litre. Further, the duty on petrol exports has been hiked to Rs 1.5 per litre, up from zero earlier.

On the global front: European stocks were trading lower, while most Asian markets closed in the red, tracking weak signals from Wall Street overnight. Rising bond yields and a spike in crude oil prices, driven by renewed tensions in the Middle East, have heightened concerns over global inflation and the possibility of higher interest rates.

Source- AceEquity

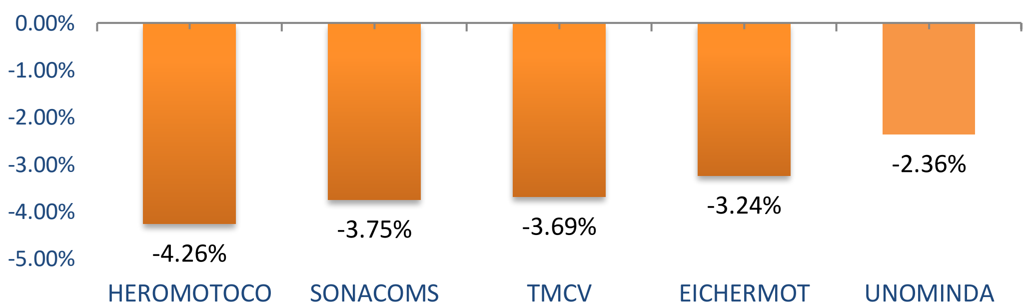
NEWS BULLETIN

- **Adani Ports and Special Economic Zone (APSEZ)** has handled its highest ever monthly cargo volume of 50 million metric tonnes (MMT) in August 2026, registering growth of over 19% year-on-year (YoY), as compared to 41.9 MMT a year earlier.

- **Bharat Forge's** wholly owned subsidiary -- Kalyani Powertrain Limited (KPTL) has sold its entire 50% stake held in REFU Drive GmbH (REFU), a joint venture company of KPTL and REFU Elektronik GmbH, to REFU Elektronik GmbH.

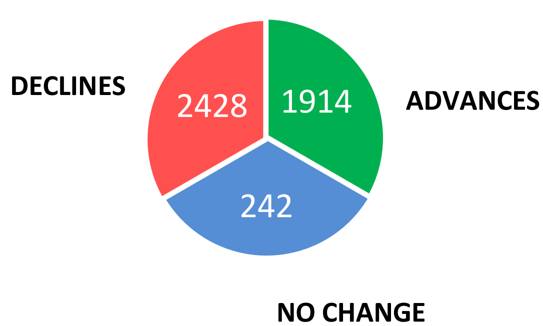
- **Bondada Engineering** has incorporated a wholly owned subsidiary -- Bondada Hindupur BESS Project (BHBPL), with the specific objective of developing, owning, operating and maintaining the 225 MW / 450 MWh Battery Energy Storage System (BESS) Project awarded by AP Transco under the Build-Own-Operate (BOO) model.

MARKET DRIVING SECTOR : AUTO



S&P BSE: AUTO
CLOSING: 61,808.16
CHANGE: - 1,056.51
CHANGE: -1.68%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.87	20.22

For Disclosure & Disclaimer, click here