END DAY COMMENTARY

4th SEPT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,152.86	76,657.02	76,883.14	76,515.43	76,515.43	+362.57	+0.48
NIFTY	23,873.45	23,910.90	24,005.75	23,895.85	23,897.70	+24.25	+0.10

INDICES ENDED THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 362.57 points or 0.48% to settle at 76,515.43 and the Nifty was up by 24.25 points or 0.10% to settle at 23,897.70. The BSE Small Cap 250 was up by 0.24% and BSE 500 was up by 0.19%. On the sectoral front, FMCG, Banks, Metal, Oil & Gas and Consumer Durables were gaining indices. On the flip side, Realty, Auto, Healthcare, Capital Goods and IT were the losing indices. Tata Steel, Reliance, Bajaj Finance, Trent and Adani Ports were gainers on the Sensex; on the flip side, Bharti Airtel, HCL Tech, Eternal, Asian Paints and TCS 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
SBILIFE	1,775.0	1,715.0	3.50
TATASTEEL	188.79	184.20	2.49
HDFCLIFE	546.40	533.50	2.42
RELIANCE	1,322.0	1,302.5	1.50
TRENT	2,853.0	2,815.6	1.33

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,293.4	1,319.0	-1.94
BHARTIARTL	1,840.0	1,869.0	-1.55
MARUTI	12,694.0	12,857.0	-1.27
BAJAJFINSV	1,970.0	1,992.1	-1.11
MAXHEALTH	984.80	994.90	-1.02

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	13031534	1,322.0	1,728.3
HDFCBANK	14488024	712.10	1,033.8
ICICIBANK	6693889	1,423.2	956.68
SBIN	6724566	1,016.1	686.95
TATASTEEL	36500951	188.79	683.81

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	36500951	188.79	683.81
ETERNAL	17824027	322.75	576.75
HDFCBANK	14488024	712.10	1,033.8
RELIANCE	13031534	1,322.0	1,728.3
JIOFIN	11860254	239.50	283.96

Indian equity benchmarks ended higher on Friday, supported by easing rate-hike concerns after dovish comments from Federal Reserve Governor Christopher Waller prompted traders to scale back expectations of a rate increase this month. However, gains remained limited as elevated crude oil prices continued to weigh on broader market sentiment.

The BSE Sensex ended nearly half a percent higher, supported by broad-based buying in select heavyweight stocks, with gains in Tata Steel, Reliance Industries, HDFC Bank and Bajaj Finserv leading the recovery. Similarly, the Nifty 50 ended marginally higher, supported by selective buying in heavyweight stocks and positive global cues, while FIIs selling and weakness in IT, auto, and financial services stocks capped the upside.

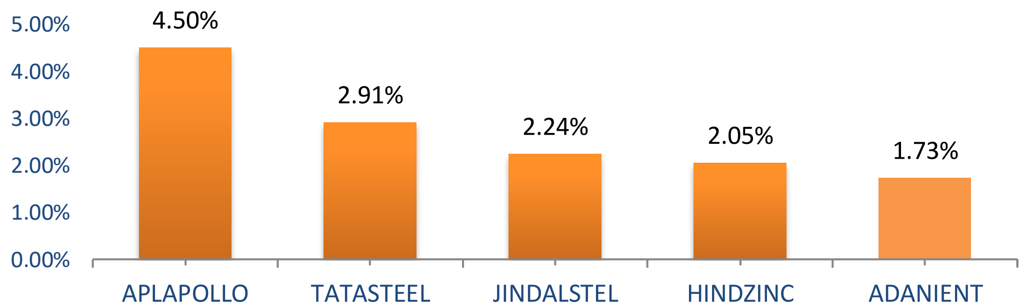
On the global front: European stocks were trading mostly higher, as traders await the U.S. monthly employment report for August later in the day for additional clues on the outlook for interest rates. Asian markets closed mostly in the green, following the broadly positive cues from Wall Street overnight.

Source- AceEquity

NEWS BULLETIN

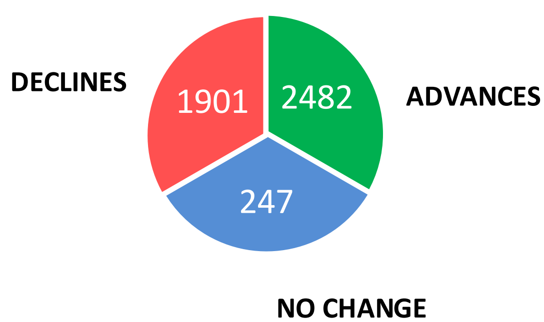
- **UltraTech** Cement's entry in the wires and cables market extends its participation in the construction value chain beyond grey cement, ready-mix concrete, building products, and white cement consistent with its stated Building Solutions strategy.
- **Ola Electric Mobility** has launched its first cohort of network-partner stores, with dealer-operated outlets in the states of Rajasthan, Tamil Nadu, Maharashtra, Bihar, Telangana, and Uttar Pradesh & Madhya Pradesh going live.
- **Acutaas Chemicals** has inaugurated new state of the art Pilot Plant, at Unit 1-Sachin, Surat. The pilot plant will support the R&D for new product trials and validations

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 42,293.66
CHANGE: +593.05
CHANGE: +1.42%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.92	20.20

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