END DAY COMMENTARY

07th September 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,515.43	76,446.05	76,477.19	75,970.52	76,132.81	-382.62	-0.50
NIFTY	23,897.70	23,883.15	23,890.00	23,737.90	23,779.15	-118.55	-0.50

INDICES SHUT THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 382.62 points or 0.50% to settle at 76,132.81 and the Nifty was down by 118.55 points or 0.50% to settle at 23,779.15. The BSE Small Cap 250 was up by 0.03% and BSE 500 was down by 0.46%. On the sectoral front, Healthcare, Hospitals and Auto were the gaining indices. On the flip side, Oil & Gas, Consumer Durables, Capital Goods, FMCG, IT, Realty, Metal and Bank were the losing indices. Larsen & Toubro, Bharti Airtel, Maruti, PowerGrid and ICICI bank were top gainers on the Sensex; on the flip side, Infosys, Tech mahindra, Tata steel, Bajaj Finserv and UltraTech cement 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 green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
APOLLOHOSP	8,760.0	8,650.0	1.27
LT	3,999.0	3,964.1	0.88
COALINDIA	418.85	415.35	0.84
BHARTIARTL	1,854.0	1,840.0	0.76
MAXHEALTH	992.00	984.80	0.73

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,087.5	1,130.0	-3.76
SBILIFE	1,732.0	1,775.0	-2.42
HDFCLIFE	533.20	546.40	-2.42
JIOFIN	234.40	239.50	-2.13
TECHM	1,564.0	1,596.9	-2.06

Most Active (by value)

Name	Qty	Pr.	Value
RELIANCE	10210522	1,309.5	1,336.3
ICICIBANK	8035111	1,427.5	1,146.4
BHARTIARTL	5972458	1,854.0	1,100.1
SBIN	10220001	1,005.9	1,028.3
HDFCBANK	12180390	710.50	865.33

Most Active (by volume)

Name	Qty	Pr.	Value
TATASTEEL	23695657	185.61	439.70
COALINDIA	13592701	418.85	567.50
ETERNAL	12845170	320.80	413.77
HDFCBANK	12180390	710.50	865.33
WIPRO	10720636	172.80	186.13

Indian markets started the session in red on Monday and magnified their losses to end near day's lows as fresh escalation in the US-Iran conflict pushed oil prices higher, raising concerns over inflation outlook. Crude oil prices surged as tit-for-tat strikes between the U.S. and Iran on vessels sailing in the Strait of Hormuz and other areas heightened concerns of a prolonged supply disruption from the Middle East

Both Sensex and Nifty ended with cut of 0.50% each due to selling pressure in IT, metal and Teck stocks. IT stocks led the losers after stronger-than-expected US jobs data strengthened expectations of a Federal Reserve rate hike in September. Higher U.S. rates could curb client spending, weighing on Indian IT firms that generate a significant share of their revenue from the United States

On the global front: European markets were trading mostly in green as Eurozone economy expanded 0.6% in Q2 2026, revised up from initial estimates of 0.4%. Asian markets ended mixed, driven by optimism that a new OpenAI model will spur demand for memory chips. Source: AceEquity

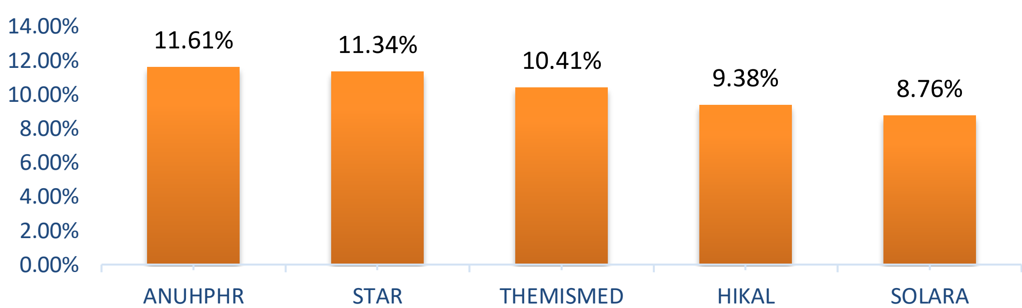
NEWS BULLETIN

- **National Aluminium Company (NALCO)** has signed Technology Licensing Agreement with Emirates Global Aluminium (EGA). The agreement is for the deployment of EGA's UAE-developed DX+ Ultra aluminium smelting technology for NALCO's 0.5 million tonnes per annum (MTPA) brownfield smelter expansion project at Anugola, Odisha.

- **CG Power and Industrial Solutions has** rollout the first power transformer from its new greenfield facility at Sehore, Madhya Pradesh. Spread over 50 acres, this facility is India's largest single-location power transformer manufacturing facility built for 220 kV to 1200 kV class power transformers with a capacity to rollout 35 power transformers every month.

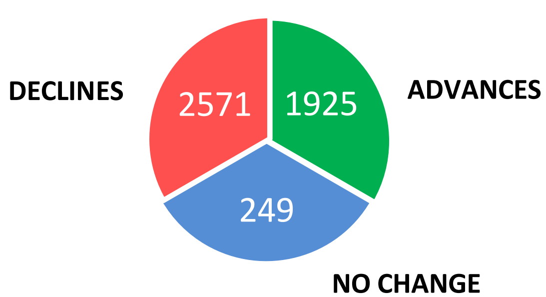
- **Maruti Suzuki India** is all set to raise the prices of selected models by up to Rs 20,000 in September 2026. The decision of price hike was taken on the backdrop of elevated inflationary pressure.

MARKET DRIVING SECTOR : HEALTHCARE



S&P BSE: HEALTHCARE
CLOSING: 51,276.89
CHANGE: +363.69
CHANGE: +0.71%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.70

PE MULTIPLE OF
20.09

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