END DAY COMMENTARY

10th SEPT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,764.23	74,742.54	74,910.96	74,598.47	74,902.59	+138.36	+0.19
NIFTY	23,431.50	23,446.60	23,494.95	23,380.10	23,477.80	+46.30	+0.20

INDICES ENDED IN GREEN AFTER A PROLONGED DECLINE

The 30-share BSE Sensex was up by 138.36 points or 0.19% to settle at 74,902.59 and the Nifty was up by 46.30 points or 0.20% to settle at 23,477.80. The BSE Small Cap 250 was up by 0. 10% and BSE 500 was down by 0.03%. On the sectoral front, Banks, Consumer Durables, Oil & Gas was the gaining index. On the flip side, Metal, FMCG, Auto, Capital Goods, Healthcare, Realty and IT were the losing indices. PowerGrid, Axis Bank, Ultratech Cement, NTPC and Tech Mahindra were gainers on the Sensex; on the flip side, HCL Tech, Tata Steel, Trent, ITC and Adani Port 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 green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
HDFCLIFE	526.15	514.00	2.36
POWERGRID	271.75	265.85	2.22
ONGC	237.27	234.02	1.39
BHARTIARTL	1,839.0	1,814.7	1.34
TECHM	1,525.8	1,508.0	1.18

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,207.0	1,229.8	-1.85
HINDALCO	1,014.0	1,026.9	-1.26
TATASTEEL	186.78	188.75	-1.04
ADANIENT	3,077.2	3,104.7	-0.89
M&M	3,123.8	3,150.0	-0.83

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	27108053	693.80	1,871.2
ICICIBANK	10580641	1,384.5	1,462.0
RELIANCE	9296079	1,274.0	1,183.8
INFY	8998529	1,036.5	931.42
BHARTIARTL	4588126	1,839.0	839.77

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	27108053	693.80	1,871.2
TATASTEEL	23334612	186.78	435.38
ITC	17541602	259.30	457.26
ETERNAL	15557911	322.10	498.97
ONGC	12771340	237.27	303.05

Markets snapped three-day losing streak and ended marginally higher on Thursday on account of value buying after recent losses. Benchmarks made a cautious start and remained range bound throughout the session, as crude oil prices above the $100-per-barrel mark, amid heightened geopolitical tensions in the Middle East and concerns over disruptions to oil supplies, weighed on investor sentiment. Foreign fund outflows also kept sentiment subdued. However, value buying in Bankex, Oil & Gas, Utilities and PSU counters supported the markets up move.

Some support came as NITI Aayog Vice Chairman Ashok Kumar Lahiri said the Indian economy has been doing reasonably well and that Asia's third-largest economy will regain its mojo and return to a current account surplus soon.

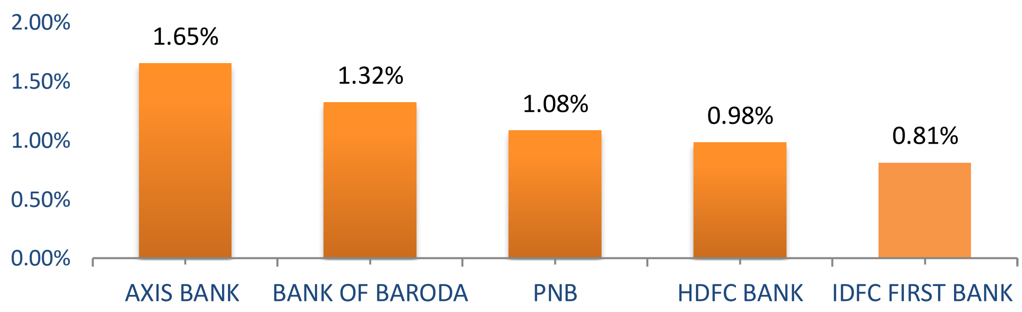
Global cues remain mixed: European markets were trading mostly in green ahead of the European Central Bank's rate hike decision later in the day. Asian markets ended mostly lower with Brent crude remaining over $100-a-barrel mark due to escalating Middle East attacks, causing fresh angst on global bond markets.

Source- AceEquity

NEWS BULLETIN

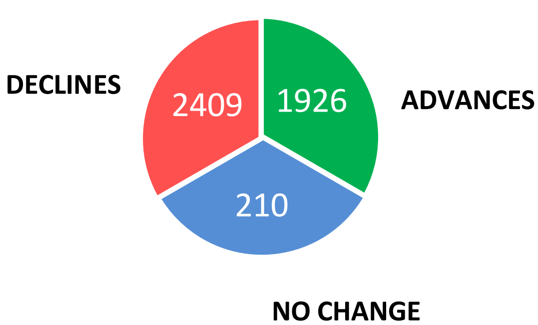
- **Tata Elxsi** has made a strategic investment in KAVIA AI, a Silicon Valley-based enterprise AI platform company. The investment strengthens the collaboration between the two companies to help enterprises manage, modernise, and transform complex software environments at scale.
- **Kotak Mahindra Bank and Amazon Pay** have launched Amazon Pay Kotak Business Credit Card for sole proprietors and small business owners.
- **Larsen & Toubro (L&T)** has become the first private sector corporate in India to raise Rs 500 crore through tokenised bonds with a 3-year tenure, under the Securities and Exchange Board of India's (SEBI) newly introduced blockchain-based tokenisation framework.

MARKET DRIVING SECTOR : BANK



S&P BSE: BANK
CLOSING: 63,963.64
CHANGE: +230.17
CHANGE: +0.36%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.77	19.85

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