END DAY COMMENTARY

15th SEPT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,781.76	75,369.63	75,436.44	73,994.03	74,003.82	-777.94	-1.04
NIFTY	23,398.10	23,576.15	23,592.85	23,118.60	23,118.60	-279.50	-1.19

INDICES ENDED THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 777.94 points or 1.04% to settle at 74,003.82 and the Nifty was down by 279.50 points or 1.19% to settle at 23,118.60. The BSE Small Cap 250 was down by 2.40% and BSE 500 was down by 1.69%. On the sectoral front, IT was the gaining index. On the flip side, Banks, Consumer Durables, Oil & Gas, Metal, FMCG, Auto, Capital Goods, Healthcare and Realty were the losing indices. HCL Tech, Infosys, Tech Mahindra, TCS and HDFC Bank were gainers on the Sensex; on the flip side, Bharat Electronics, Indigo, Titan, Bajaj Finserv and Adani Ports 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
HCLTECH	1,253.7	1,206.1	3.95
INFY	1,077.0	1,037.7	3.79
TCS	2,251.0	2,200.8	2.28
TECHM	1,575.9	1,541.0	2.26
WIPRO	170.00	167.40	1.55

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BEL	382.90	404.35	-5.30
SHRIRAMFIN	979.80	1,028.6	-4.74
ADANIENT	2,928.6	3,060.0	-4.29
INDIGO	4,776.0	4,973.0	-3.96
GRASIM	3,171.0	3,281.9	-3.38

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	50387632	716.55	3,641.8
RELIANCE	13754376	1,235.3	1,718.2
INFY	14816117	1,077.0	1,605.4
ICICIBANK	10133488	1,350.4	1,375.9
TCS	5406210	2,251.0	1,241.1

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	50387632	716.55	3,641.8
TATASTEEL	31857708	183.65	584.62
TMPV	19003987	303.60	592.62
BEL	16741114	382.90	653.36
INFY	14816117	1,077.0	1,605.4

Indian equity benchmarks erased early gains and ended lower on Tuesday, weighed down by rising inflation and escalating military tensions between the U.S. and Iran in West Asia. Meanwhile, surging bond yields and soaring crude oil prices heightened global inflation worries, reinforcing expectations of an imminent interest rate hike by the U.S. Federal Reserve this week.

India's retail inflation rises to 4.82% in August: Traders remained cautious as the government data showed India's retail inflation rose to 4.82 per cent in August, driven by costly onions and other food items, a trend the RBI will have to factor in when its rate-setting panel meets early next month.

On the global front: European stocks were trading lower, as surging oil prices and elevated bond yields weighed on the banking sector. Asian markets closed mostly in the red, following the broadly negative cues from Wall Street overnight, as traders remained concerned about the uncertainty in the Middle East conflict.

Source- AceEquity

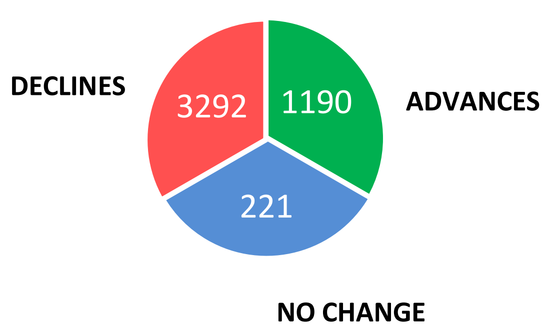
NEWS BULLETIN

- **Aurobindo Pharma** has received final approval from the US Food & Drug Administration (USFDA) to manufacture and market Beclomethasone Dipropionate HFA Inhalation Aerosol, 40 mcg and 80 mcg, a generic equivalent of QVAR Inhalation Aerosol 40 mcg and 80 mcg, marketed by Teva Branded Pharmaceutical Products R&D LLC.
- **Uno Minda's** Board has approved a series of strategic capacity expansion and plant consolidation projects across its key business verticals to strengthen its manufacturing footprint, boost capacities across key divisions, and cater to surging demand from leading Original Equipment Manufacturers (OEMs).
- **Cummins India** has launched its next-generation power solutions 'Cummins QSK60 powered G34 and G37 genset solutions'.

MARKET DRIVING SECTOR : CAPITAL GOODS

S&P BSE: CAPITAL GOODS
CLOSING: 74,294.89
CHANGE: -3,245.17
CHANGE: -4.19 %

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.68	19.54

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