END DAY COMMENTARY

16th 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	74,003.82	74,249.31	74,505.86	73,981.33	74,336.45	+332.63	+0.45
NIFTY	23,118.60	23,201.60	23,284.75	23,116.10	23,217.60	+99.00	+0.43

INDICES ENDED THE DAY ON A FLAT NOTE

The 30-share BSE Sensex was up by 332.63 points or 0.45% to settle at 74,336.45 and the Nifty was up by 99.00 points or 0.43% to settle at 23,217.60. The BSE Small Cap 250 was down by 0.13% and BSE 500 was up by 0.30%. On the sectoral front, Banks, FMCG, Auto, Oil & Gas, Consumer Durables, Realty and Metal were the gaining index. On the flip side, Capital Goods, Healthcare and IT were the losing indices. ITC, SBIN, Axis Bank, Trent and M&M were the top gainers on the Sensex; on the flip side, TCS, Infosys, Tech Mahindra, Baja Finserv and NTPC 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
HDFCLIFE	530.20	516.10	2.73
SBILIFE	1,697.9	1,654.1	2.65
SBIN	991.40	968.00	2.42
ITC	264.15	258.00	2.38
NESTLEIND	1,384.5	1,362.0	1.65

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TCS	2,188.8	2,251.0	-2.76
WIPRO	166.89	170.00	-1.83
INFY	1,060.0	1,077.0	-1.58
TECHM	1,558.0	1,575.9	-1.14
LT	3,807.7	3,850.7	-1.12

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	27476943	721.50	1,974.3
ICICIBANK	9625762	1,358.8	1,302.7
RELIANCE	10023997	1,240.0	1,252.6
SBIN	8609956	991.40	847.99
LT	2038640	3,807.7	779.70

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	29476234	183.00	540.03
HDFCBANK	27476943	721.50	1,974.3
ITC	15199856	264.15	399.53
TMPV	12264774	301.00	369.45
JIOFIN	11926382	224.84	269.89

Indian equity benchmarks ended higher on Wednesday, rebounding from a sell-off in the previous session, amid optimistic cues from other Asian markets. Sentiments remained upbeat as Commerce Secretary Rajesh Agrawal stated that the India-New Zealand free trade agreement (FTA) is likely to take effect in late next month, with official dates to be announced shortly. Meanwhile, investors were eyeing the Federal Reserve's policy decision. Traders took support with the commerce ministry's data showing that India's merchandise exports rose by 26.10 per cent to $43.81 billion in August 2026 as compared to $34.74 billion in August 2025, driven by a jump in petroleum product shipments. The growth in exports in August was the highest since June 2022, when shipments had risen 30.12 per cent.

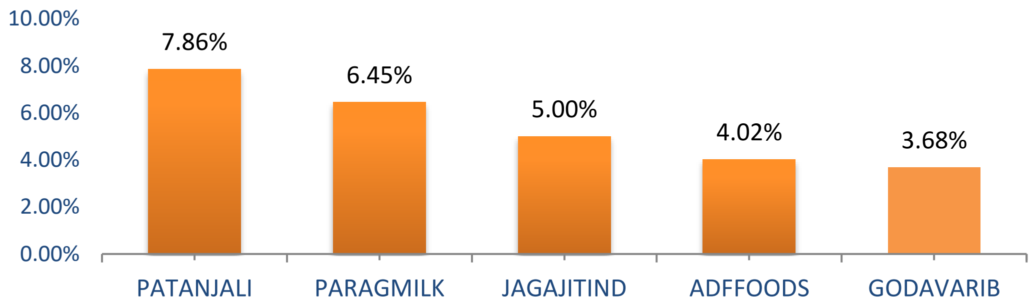
On the global front: European markets were trading higher, ahead of the Federal Reserve's interest-rate decision later in the day. Asian markets closed mostly in green, even after Japan posted a merchandise trade deficit of 1.105 trillion yen in August. That missed forecasts for a deficit of 1.052 trillion yen following the 634.5 billion yen shortfall in July.

Source- AceEquity

NEWS BULLETIN

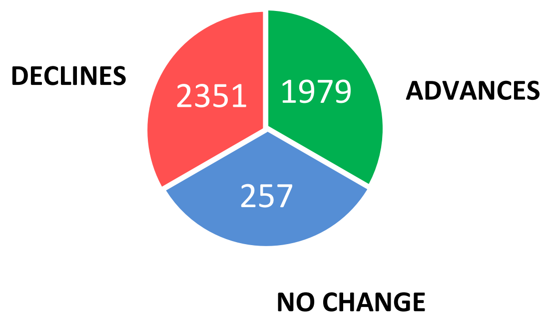
- **ACME Solar Holdings**, through its subsidiaries, has commissioned 66.68 MW of Solar and 300 MWh of Battery Energy Storage System (BESS) capacities in Bikaner, Rajasthan, expanding its operational portfolio.
- **Exide Industries** and ExCom Energy Solutions GmbH (ExCom GmbH), Germany, have entered into a long-term strategic cooperation agreement for the industrial battery and energy storage systems across the European Economic Area (EEA).
- **NBCC (India)** has secured orders worth around Rs 144.98 crore (excluding GST). Out of these orders, the company has secured orders worth around Rs 111.92 crore from Steel Authority of India, Bokaro Steel Plant

MARKET DRIVING SECTOR : FMCG



S&P BSE: FMCG
CLOSING: 17,266.90
CHANGE: +244.88
CHANGE: +1.44%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.96	19.62

For Disclosure & Disclaimer, click here