END DAY COMMENTARY

17th SEPT 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,336.45	74,182.62	74,677.56	74,163.95	74,314.59	-21.86	-0.03
NIFTY	23,217.60	23,195.25	23,363.55	23,193.65	23,270.60	+53.00	+0.23

INDICES ENDED THE DAY ON A MIXED NOTE

The 30-share BSE Sensex was down by 21.86 points or 0.03% to settle at 74,314.59 and the Nifty was up by 53.00 points or 0.23% to settle at 23,270.60. The BSE Small Cap 250 was up by 0.93% and BSE 500 was up by 0.46%. On the sectoral front, Capital Goods, Healthcare, IT, FMCG, Auto, Consumer Durables, Realty and Metal were the gaining index. On the flip side, Banks and Oil & Gas were the losing indices. Tata Steel, BEL, Indigo, Eternal and Maruti were gainers on the Sensex; on the flip side, HDFC Bank, Titan, ICICI Bank, SBIN and Bharti Airtel 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	557.00	530.20	5.05
TMPV	314.50	301.00	4.49
SBILIFE	1,766.9	1,697.9	4.06
DRREDDY	1,175.0	1,140.0	3.07
BEL	395.45	385.75	2.51

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ONGC	232.43	236.80	-1.85
TITAN	4,841.0	4,908.5	-1.38
HDFCBANK	713.00	721.50	-1.18
HINDUNILVR	1,942.2	1,962.0	-1.01
COALINDIA	418.00	422.25	-1.01

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	21543303	713.00	1,541.92
ICICIBANK	7867524	1,347.6	1,065.11
RELIANCE	7752895	1,243.9	964.75
ETERNAL	27543143	322.35	894.24
SBIN	8624398	988.70	853.92

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	29397693	187.29	545.74
ETERNAL	27543143	322.35	894.24
HDFCBANK	21543303	713.00	1,541.9
ITC	13365227	266.20	355.68
JIOFIN	12303050	229.30	281.36

Indian equities markets ended the range bound trade mixed on Thursday, following the U.S. Federal Reserve's decision to raise interest rates by 25 basis points, its first rate hike since 2023. Sentiments remained cautious due to continuous selling by Foreign Institutional Investors (FIIs), who offloaded securities worth Rs 2,032.61 crore on Wednesday

India, Bhutan discuss development partnership, energy, trade and connectivity: Traders took note of India and Bhutan discussed key areas of bilateral cooperation, including development partnership, energy, trade and connectivity as External Affairs Minister S Jaishankar held talks with his Bhutanese counterpart D N Dhungyel in Bumthang on September 16, 2026.

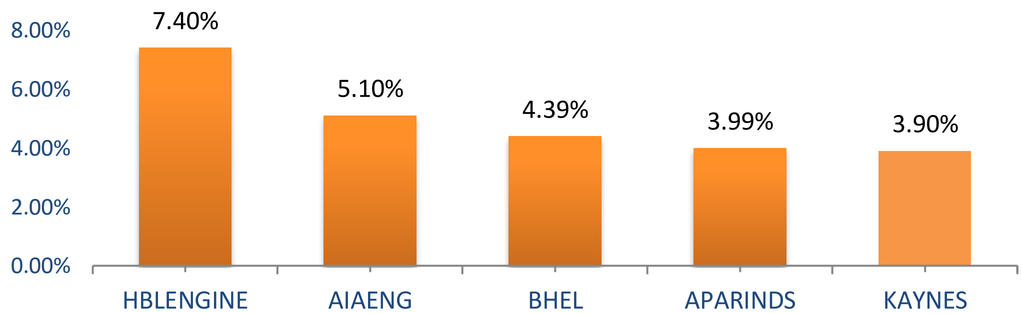
On the global front: European stocks were trading higher, as the global bond selloff paused following Wednesday's hawkish Fed hike. Asian markets closed mostly in the green, amid easing Middle East supply concerns amid reports of Saudi Arabia loading crude cargoes via Oman.

Source- AceEquity

NEWS BULLETIN

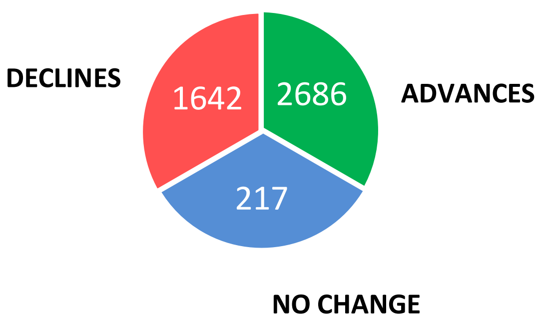
- **Aditya Birla Fashion and Retail's subsidiary -- Sabyasachi India (SIL)** has incorporated a wholly owned subsidiary (WOS) by name 'Sabyasachi Retail FZ-LLC' in Ras Al Khaimah, United Arab Emirates (UAE). Consequent to the incorporation, 'Sabyasachi Retail FZ-LLC' has become a step-down subsidiary of the company.
- **Tata Motors** is all set to increase prices by up to 1% on its range of commercial vehicles, effective from October 01, 2026. The revision is being taken to offset the rise in commodity and other input costs. The increase will differ depending on the model and variant.

MARKET DRIVING SECTOR : CAPITAL GOODS



S&P BSE: CAPITAL GOODS
CLOSING: 75,680.66
CHANGE: + 1,452.26
CHANGE: +1.96%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.99	19.67

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