END DAY COMMENTARY

21st SEPT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,294.96	74,535.18	74,987.40	74,454.18	74,858.99	+564.03	+0.76
NIFTY	23,346.40	23,330.20	23,466.80	23,314.80	23,414.30	+67.90	+0.29

INDICES IN ENTERED THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 564.03 points or 0.76% to settle at 74,858.99 and the Nifty was up by 67.90 points or 0.29% to settle at 23,414.30. The BSE Small Cap 250 was up by 0.09% and BSE 500 was up by 0.46%. On the sectoral front, Banks, FMCG, IT, Consumer Durables Capital Goods, Oil & Gas, Healthcare and Realty were the gaining index. On the flip side, Auto and Metal were the losing indices. UltraTech Cement, HCL Tech, Eternal, Titan and ITC were gainers on the Sensex; on the flip side, Bharti Airtel, Power Grid, Infosys, Adani Ports and Tata Steel 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
ETERNAL	335.90	326.85	2.77
HCLTECH	1,281.0	1,249.3	2.54
ITC	267.00	262.30	1.79
SUNPHARMA	1,868.9	1,837.3	1.72
RELIANCE	1,247.4	1,226.4	1.71

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BHARTIARTL	1,830.2	1,893.3	-3.33
ADANIPORTS	1,787.1	1,824.0	-2.02
BAJFINANCE	1,021.3	1,040.3	-1.83
POWERGRID	266.10	270.30	-1.55
ADANIENT	2,975.0	3,020.0	-1.49

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	35478214	739.50	2,622.0
BHARTIARTL	9716504	1,830.2	1,781.4
RELIANCE	10006576	1,247.4	1,241.6
ICICIBANK	5705271	1,345.0	767.08
ETERNAL	20274136	335.90	675.15

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	35478214	739.50	2,622.0
ETERNAL	20274136	335.90	675.15
RELIANCE	10006576	1,247.4	1,241.6
TATASTEEL	9931497	183.40	183.40
BEL	9754619	398.50	387.12

Indian equity markets ended higher on Monday, tracking mostly positive cues from other Asian markets as crude prices eased amid hopes that diplomatic efforts could help de-escalate tensions in West Asia. Traders took support from Foreign Institutional Investors (FIIs), who turned net buyers on September 18, 2026, after witnessing heavy selling in the previous few sessions, purchasing equities worth Rs 599.54 crore.

India's exports to core BRICS nations surge 34% to $19.9 billion in April-August: Traders took support with commerce ministry's data showed India's exports to China, South Africa, Brazil and Russia grew 34 per cent to $19.9 billion in April-August 2026-27, led by a 39 per cent jump in shipments to China, highlighting the growing importance of the BRICS bloc for India's export growth.

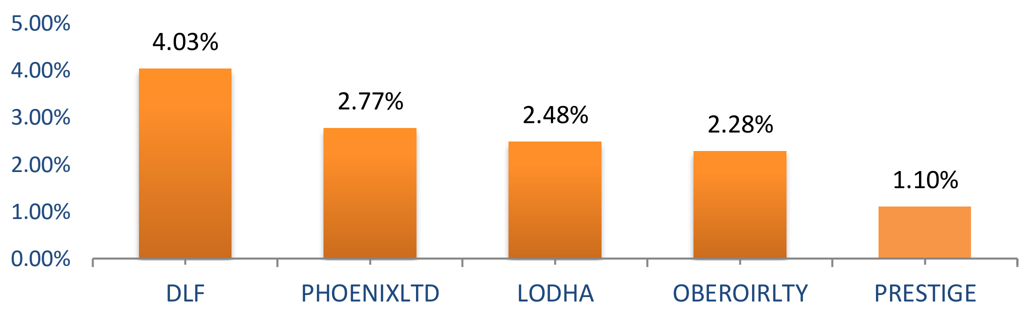
On the global front: European stocks were trading higher, while Asian markets closed mostly in the green, as oil extended declines on hopes of a diplomatic path to de-escalate the U.S.-Iran war.

Source- AceEquity

NEWS BULLETIN

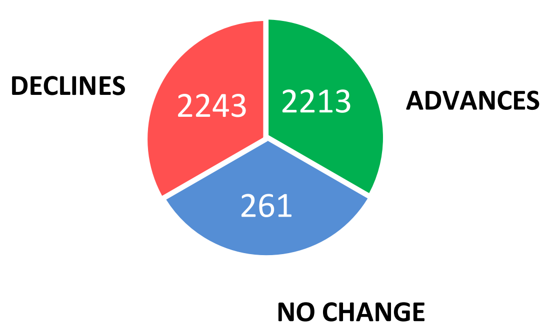
- **IIFL Finance** has raised Rs 130 crore through the allotment of Secured, Listed, Rated, Redeemable, Non-Convertible Debentures (NCDs) of the face value of Rs 1,00,000 each under Series D37 Reissue I, in dematerialised form and on private placement basis.
- **Piramal Finance** has received approval for allotment of 1,10,000 Secured, Rated, Listed, Redeemable, Non-Convertible Debentures (NCDs) each having a face value of Rs 1,00,000 amounting Rs 1100 crore on Private Placement basis.
- **Maruti Suzuki** India has achieved a significant milestone of 1 million (10 lakh) cumulative vehicle dispatches through its in-plant railway sidings at Hansalpur, Gujarat and Manesar, Haryana.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 6,668.32
CHANGE: +112.05
CHANGE: +1.71%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.21	19.80

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