# END DAY COMMENTARY

22nd SEPT 2026

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BROKING | INVESTMENT BANKING | RESEARCH | DISTRIBUTION | DEPOSITORY|PMS

| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|---|---|---|---|---|---|---|---|
| SENSEX | 74,858.99 | 74,901.50 | 75,038.93 | 74,423.71 | 74,529.08 | -329.91 | -0.44 |
| NIFTY | 23,414.30 | 23,454.05 | 23,489.00 | 23,285.75 | 23,329.00 | -85.30 | -0.36 |

## INDICES ENDED THE DAY ON A WEAK NOTE

The 30-share BSE Sensex was down by 329.91 points or 0.44% to settle at 74,529.08 and the Nifty was down by 85.30 points or 0.36% to settle at 23,329.00. The BSE Small Cap 250 was down by 0.25% and BSE 500 was down by 0.32%. On the sectoral front, Realty was the gaining index. On the flip side, Auto, Banks, FMCG, IT, Consumer Durables Capital Goods, Oil & Gas, Healthcare and Metal were the losing indices. Eternal, Indigo, Titan, Tata Steel and NTPC were gainers on the Sensex; on the flip side, Bajaj Finserv, Trent, Bajaj Finance, Sun Pharma and TCS 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 |
|---|---|---|---|
| COALINDIA | 428.00 | 414.7 | 3.21 |
| ETERNAL | 342.00 | 335.90 | 1.82 |
| INDIGO | 5,030.0 | 4,941.0 | 1.80 |
| TITAN | 4,928.5 | 4,875.0 | 1.10 |
| DRREDDY | 1,211.0 | 1,198.3 | 1.06 |

### Top Losers

| Name | Closing Pr. | Previous Pr. | %Ch |
|---|---|---|---|
| TATACONSUM | 984.10 | 1,000.6 | -1.65 |
| NESTLEIND | 1,363.9 | 1,385.0 | -1.52 |
| BAJAJFINSV | 1,823.4 | 1,849.8 | -1.43 |
| BAJFINANCE | 1,008.8 | 1,021.3 | -1.22 |
| SUNPHARMA | 1,846.4 | 1,868.9 | -1.20 |

### Most Active (by value)

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| HDFCBANK | 35483074 | 738.60 | 2,641.8 |
| RELIANCE | 10684210 | 1,240.4 | 1,330.3 |
| INFY | 9340979 | 1,029.4 | 959.59 |
| ICICIBANK | 6433223 | 1,339.6 | 862.30 |
| TCS | 3641377 | 2,105.0 | 767.73 |

### Most Active (by volume)

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| HDFCBANK | 35483074 | 738.60 | 2,641.8 |
| ETERNAL | 22276938 | 342.00 | 754.54 |
| TATASTEEL | 17525459 | 184.97 | 322.75 |
| COALINDIA | 16675804 | 428.00 | 710.21 |
| WIPRO | 14726886 | 166.00 | 242.15 |

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# End Day Commentary
**22nd SEPT 2026**

Indian equity markets failed to hold early gains and ended in the red on Tuesday, as investors kept an eye on the latest developments in West Asia and awaited the outcome of the Trump-Xi meeting in Washington on Thursday, with trade, AI, and geopolitics dominating the agenda. Meanwhile, US President Donald Trump said he was open to meeting Iranian President Masoud Pezeshkian in New York this week.

RBI accepts Rs 25,000 crore bids in second tranche of OMO sale: In the second tranche of its open market operation (OMO) sale of government securities, the Reserve Bank of India (RBI) has accepted bids worth Rs 25,000 crore, as it stepped up efforts to absorb surplus liquidity from the banking system

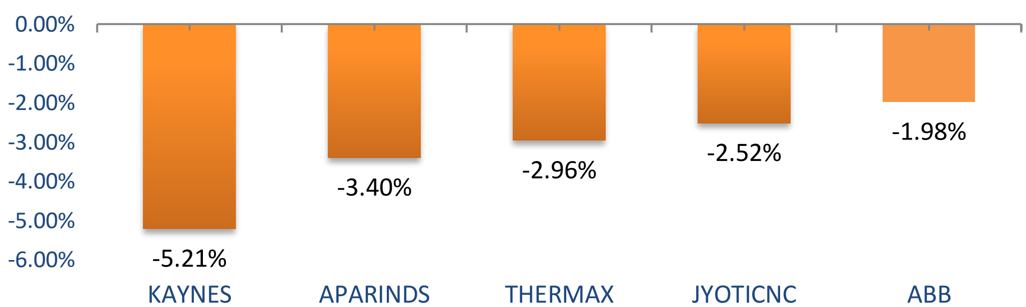
On the global front: European stocks were trading higher amid easing inflation concerns and hopes of a resumption in U.S.-Iran negotiations. Asian markets closed mostly higher, following broadly positive cues from Wall Street overnight. Falling oil prices and easing U.S. Treasury yields helped support investor sentiment.

Source- AceEquity

## NEWS BULLETIN

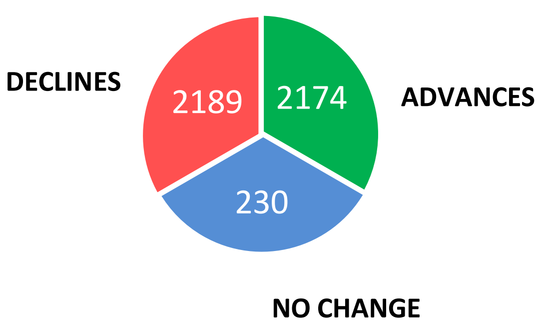
- **Tech Mahindra** has entered into partnership with CoRover.ai, a pioneer in conversational and generative AI, to empower organizations and governments adopt AI solutions aligned with their operational, contextual, and sovereignty requirements.
- **Persistent Systems** has achieved the Databricks Brickbuilder Specialization for Banking, Financial Services and Insurance (BFSI). The recognition reflects Persistent's industry expertise and experience delivering solutions on the Databricks Data Intelligence Platform.
- **Anlon Healthcare** has incorporated a subsidiary namely 'Anlon Healthcare Nigeria' in Nigeria on September 20, 2026. The purpose of incorporation of this subsidiary is aligned with the company's long-term growth objective.

## MARKET DRIVING SECTOR : CAPITAL GOODS




**S&P BSE: CAPITAL GOODS**
**CLOSING: 76,415.95**
**CHANGE: -669.32**
**CHANGE: -0.87%**

## MARKET BREADTH – NEGATIVE




## RATIO ANALYSIS

| PUT CALL RATIO | PE MULTIPLE OF NIFTY |
| --- | --- |
| 0.90 | 19.72 |

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