END DAY COMMENTARY

23rd SEPT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,529.08	74,648.32	74,973.74	74,599.88	74,828.25	+299.17	+0.40
NIFTY	23,329.00	23,352.15	23,466.90	23,349.55	23,446.80	+ 117.80	+0.05

INDICES ENDED THE DAY ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 299.17 points or 0.04% to settle at 74,828.25 and the Nifty was up by 117.80 points or 0.05% to settle at 23,446.80. The BSE Small Cap 250 was up by 0.65% and BSE 500 was up by 0.56%. On the sectoral front, Banks, FMCG, Consumer Durables Capital Goods, Oil & Gas, Healthcare, Auto, Metal and Realty were the gaining index. On the flip side, IT was the losing index. Tata Steel, Bajaj Finance, ITC, Ultra Tech Cement and PowerGrid were gainers on the Sensex; on the flip side, HCL Tech, TCS, Infosys, Titan and M&M were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
BAJFINANCE	1,043.2	1,008.8	3.41
HINDALCO	1,003.8	973.00	3.17
TATASTEEL	190.82	184.97	3.16
APOLLOHOSP	9,069.0	8,835.5	2.64
JSWSTEEL	1,297.8	1,267.0	2.43

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,256.7	1,270.4	-1.08
TITAN	4,880.0	4,928.5	-0.98
INFY	1,020.5	1,029.4	-0.86
COALINDIA	424.55	428.00	-0.81
TCS	2,089.6	2,105.0	-0.73

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	23197231	737.25	1,715.4
RELIANCE	8352048	1,248.0	1,041.7
BAJFINANCE	8618523	1,043.2	891.02
M&M	2600352	3,035.0	789.52
TATASTEEL	39798327	190.82	754.38

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	39798327	190.82	754.38
HDFCBANK	23197231	737.25	1,715.4
ETERNAL	18360484	342.65	628.81
ITC	13142058	270.15	353.48
WIPRO	10856986	164.90	178.97

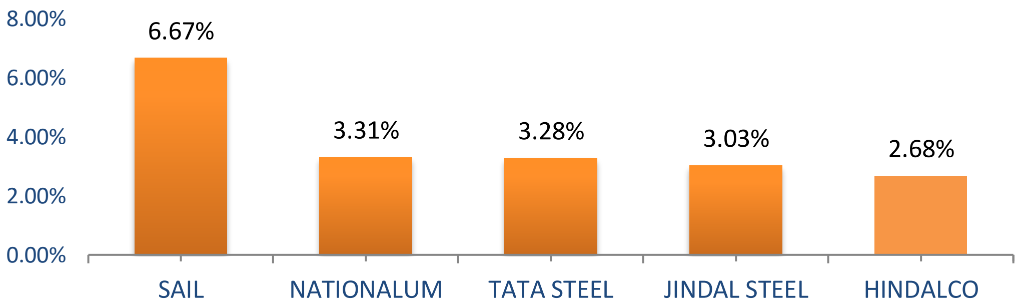
Indian equity markets ended higher on Wednesday, supported by a decline in crude oil prices and gains across Asian markets amid signs of de-escalation in U.S.-Iran tensions. Sentiment improved after U.S. President Donald Trump said that U.S. officials had a 'very good' meeting with an Iranian delegation in New York. Sentiments remained upbeat as S&P Global Ratings raised its forecast for India's GDP growth for the current fiscal year ending March 31, 2027, to 7.0%, from 6.6% previously. Both indices, the Sensex and Nifty, closed with gains of around half a percent, supported by broad-based gains by metals, financials and select large-cap stocks. However, weakness in major IT stocks capped some of the market's gains.

On the global front: European stocks were trading mostly in red as investors keep a close eye on developments between the U.S. and Iran. Asian markets closed mostly higher, following the mixed cues from Wall Street overnight, amid optimism about a diplomatic resolution to the US-Iran conflict after US and Iranian officials held a three-hour meeting on the sidelines of the UN gathering. Source- AceEquity

NEWS BULLETIN

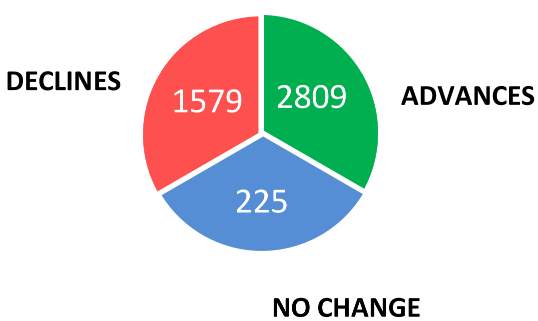
- **Gujarat State Fertilizers & Chemicals** has launched seven new products under its 'Crop Protection Chemicals' product category on September 23, 2026.
- **Samvardhana Motherson International** has incorporated an indirect subsidiary namely 'MH Supply Chain' (MHSCL-US) in Delaware, USA. MHSCL-US is established, inter-alia, with the objects to offer world class supply chain solutions to automotive industry and support customers with essential logistics requirements.
- **Coforge** has expanded its AgenticOps capabilities to help enterprises build the operational foundation required to scale AI-driven autonomy securely, resiliently, and cost-effectively.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 42,064.43
CHANGE: +975.78
CHANGE: +2.37%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.03	19.82

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