END DAY COMMENTARY

24th 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	74,828.25	74,272.40	74,362.29	73,563.92	73,580.54	-1,247.71	-1.67
NIFTY	23,446.80	23,221.80	23,281.95	23,046.15	23,063.10	-383.70	-1.64

INDICES ENDED THE DAY ON A RED NOTE

The 30-share BSE Sensex was down by 1,247.71 points or 1.67% to settle at 73,580.54 and the Nifty was down by 383.70 points or 1.64% to settle at 23,063.10. The BSE Small Cap 250 was down by 1.28% and BSE 500 was down by 1.62%. On the sectoral front, there was no gaining index. On the flip side, Realty, Auto, Banks, FMCG, IT, Consumer Durables Capital Goods, Oil & Gas, Healthcare and Metal were the losing indices. There was no gainer on the Sensex; on the flip side, Bajaj Finance, Axis Bank, Bajaj Finserv, Indigo and Trent were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
CIPLA	1,399.0	1,383.0	1.16
ONGC	239.00	236.90	0.89
NTPC	326.60	326.00	0.18

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HDFCLIFE	526.90	561.50	-6.16
BAJFINANCE	982.00	1,043.2	-5.87
AXISBANK	1,186.5	1,243.2	-4.56
BAJAJFINSV	1,762.3	1,846.5	-4.56
ADANIENT	2,900.0	2,993.2	-3.11

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	29575194	728.90	2,158.84
RELIANCE	13923795	1,219.2	1,711.76
SBIN	13724672	978.5	1,346.84
BAJFINANCE	13385656	982.00	1,323.72
AXISBANK	10890660	1,186.5	1,297.81

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	29575194	728.90	2,158.8
HDFCLIFE	17905953	526.90	944.49
TATASTEEL	15701549	188.02	297.32
ETERNAL	14989187	335.50	508.07
RELIANCE	13923795	1,219.2	1,711.7

Indian equity markets ended near the day's low on Thursday as crude oil prices surged above the $100-per-barrel mark, while U.S. bond yields climbed to their highest levels in nearly two decades. Further, renewed concerns over inflation increased expectations that the U.S. Federal Reserve could deliver another interest-rate hike later this year.

RBI Deputy Governor says rupee could appreciate after recent fall: Traders overlooked the Reserve Bank of India's (RBI) Deputy Governor Poonam Gupta statement that there is a fair case for the rupee to not just stabilise but even appreciate from current levels, as the currency's 13.1% depreciation over the past one-and-a-half years appears to be a temporary phenomenon.

On the global front: European stocks were trading mostly in the red, while Asian markets closed mostly lower, amid ongoing tensions in West Asia. Meanwhile, hawkish commentary from the Federal Reserve raised expectations of another Fed rate hike.

Source- AceEquity

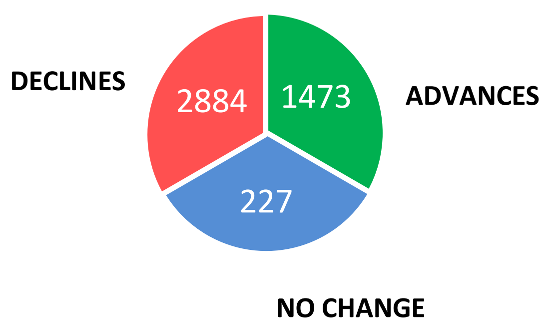
NEWS BULLETIN

- **H.G. Infra Engineering** has received the completion certificate for the project 'Development of 6-lane Urban Extension Road (UER) -II - NH- 344 M, Package 1 (from NH 1 to Karala-Kanjhawala Road, Km (-) 0+700 to 15+000) in the State of Delhi on EPC mode'.
- **Vikran Engineering** has secured a new order worth around Rs 153.76 crore (exclusive of GST) from Power Grid Corporation of India (POWERGRID) for the 400 kV AIS Extension Substation Package SS136T.
- **UltraTech Cement** has commissioned 4.6 million tonnes per annum (mtpa) of cement capacity, comprising 3.6 mtpa of greenfield integrated capacity at Petnikota, Andhra Pradesh, and 1.0 mtpa through debottlenecking at the company's existing cement plants in Visakhapatnam (Andhra Pradesh), Patratu (Jharkhand), and Nathdwara (Rajasthan).

MARKET DRIVING SECTOR : BANK

S&P BSE: BANK
CLOSING: 62,717.21
CHANGE: - 1199.31
CHANGE: -1.88%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.81	19.49

For Disclosure & Disclaimer, click here