END DAY COMMENTARY

25th SEPT 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,580.54	73,525.92	73,968.05	73,477.77	73,895.74	+315.20	+0.43
NIFTY	23,063.10	23,035.00	23,162.70	23,020.95	23,140.50	+77.40	+0.34

INDICES IN RED AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was up by 315.20 points or 0.43% to settle at 73,895.74 and the Nifty was up by 77.40 points or 0.34% to settle at 23,140.50. The BSE Small Cap 250 was down by 0.01% and BSE 500 was up by 0.18%. On the sectoral front, Banks, Auto, FMCG, IT, Consumer Durables Capital Goods, and Realty were the gaining index. On the flip side, Oil & Gas, Healthcare and Metal were the losing indices. Axis Bank, M&M, Asian Paints, Bajaj Finance and HCL Tech were gainers on the Sensex; on the flip side, Trent, Infosys, Kotak Bank, ICICI Bank 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
AXISBANK	1,222.4	1,186.5	3.03
ASIANPAINT	2,444.0	2,392.7	2.14
M&M	3,035.0	2,982.7	1.75
BAJFINANCE	996.90	982.00	1.52
HCLTECH	1,258.0	1,243.6	1.16

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
MAXHEALTH	1,014.0	1,046.0	-3.06
TMPV	290.45	295.00	-1.54
INFY	1,000.2	1,014.5	-1.41
ONGC	235.86	239.00	-1.31
TRENT	2,669.3	2,700.0	-1.14

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	13138735	1,226.0	1,603.5
HDFCBANK	19853034	735.60	1,456.5
ICICIBANK	10841310	1,326.8	1,438.1
INFY	10240700	1,000.2	1,022.1
BHARTIARTL	4766200	1,785.4	854.16

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	24508361	335.00	819.36
TMPV	22634929	290.45	660.67
HDFCBANK	19853034	735.6	1,456.5
KOTAKBANK	18175573	404.00	733.44
TATASTEEL	15890667	187.97	299.60

Indian equity benchmarks failed to sustain their initial gains and ended in negative territory on Thursday, amid persistent geopolitical concerns and heightened uncertainty in global markets. Investors also remained focused on global interest-rate expectations, including the possibility of a US Federal Reserve rate hike. However, losses were limited after India raised a $127.23 billion in Foreign Currency Non-Resident (FCNR-B) deposits under the Reserve Bank of India's (RBI) special USD-INR forex swap facility till August 31. Traders paid no heed to Finance Minister Nirmala Sitharaman's statement that India recorded a 'remarkable growth' of 7.8 per cent in the first quarter of fiscal year 2026-27 despite global disruptions, and against all odds, remains the fastest-growing major economy in the world.

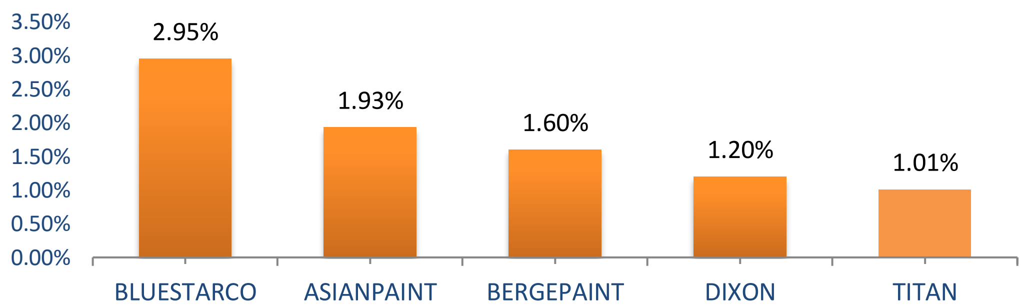
On the global front: European stocks were trading mostly lower, as investors weighed renewed concerns over global inflation. Sentiments were also pressured by data showing weaker-than-expected growth in US private-sector employment. Asian markets closed mostly in the green, following the broadly positive cues from Wall Street overnight, amid optimism over the outlook for interest rates.

Source- AceEquity

NEWS BULLETIN

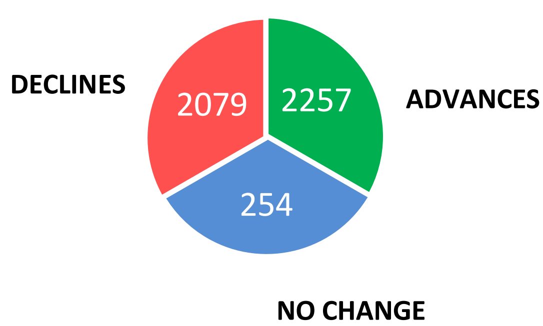
- **Saatvik Green Energy's** material subsidiary has received an order aggregating to Rs 297.5 crore from two renowned Independent Power producers/EPC Players for the supply of solar photovoltaic (PV) modules. The order will be executed by March 2027.
- **Ceigall India (CIL)** has received Letter of Intent (LoI) from REC Power Development and Consultancy (RECPDCL) for Common Transmission System for evacuation of power from Lakadia (Phase-II: 7.5GW), Jam Khambhaliya (Phase-II: 5.5GW) and Jamnagar (Phase-I: 1GW) - Part-B.
- **Prestige Group** has added a 17.14-acre land parcel in Sector 109, Gurgaon to its residential development portfolio. Located in one of Gurgaon's prime residential sectors

MARKET DRIVING SECTOR : CONSUMER DURABLE



S&P BSE: CONSUMER DURABLES
CLOSING: 61,053.01
CHANGE: + 690.92
CHANGE: +1.14%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.96	19.56

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