END DAY COMMENTARY

28th SEPT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,895.74	73,734.83	73,740.85	72,716.23	72,771.72	-1,124.02	-1.52
NIFTY	23,140.50	23,064.90	23,080.25	22,762.20	22,780.25	-360.25	-1.56

INDICES ENDED THE DAY ON A NEGATIVE NOTE

The 30-share BSE Sensex was down by 1,124.02 points or 1.52% to settle at 72,771.72 and the Nifty was down by 360.25 points or 1.56% to settle at 22,780.25. The BSE Small Cap 250 was down by 1.62% and BSE 500 was down by 1.60%. On the sectoral front, there was no gaining index. On the flip side, Banks, FMCG, Consumer Durables Capital Goods, Oil & Gas, Healthcare, Auto, Metal, IT and Realty was the losing indices. Infosys was the only gainer on the Sensex; on the flip side, Larsen & Toubro, Powergrid, Adani Port, HDFC Bank and Hindustan Unilever 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 green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
DRREDDY	1,221.0	1,201.0	1.67
INFY	1,003.2	1,000.2	0.30
HDFCLIFE	531.60	531.00	0.11

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TMPV	281.75	290.45	-3.00
ADANIENT	2,831.1	2,916.5	-2.93
JIOFIN	220.50	227.00	-2.86
POWERGRID	261.85	269.50	-2.84
LT	3,766.4	3,876.2	-2.83

Most Active (by value)

Name	Qty	Pr.	Value CR
RELIANCE	13602349	1,197.6	1,640.2
HDFCBANK	21675579	719.05	1,565.2
SBIN	9846646	962.00	949.09
INFY	8567672	1,003.2	855.76
BHARTIARTL	4683537	1,771.4	830.91

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	21675579	719.05	1,565.2
ETERNAL	19560239	330.95	646.06
JIOFIN	17931553	220.50	398.03
KOTAKBANK	15062655	401.55	602.08
TMPV	14063134	281.75	399.44

After a one-day halt, Indian equity markets again ended in the red on Monday, with the indices witnessing a bloodbath amid heavy selling pressure. Sentiments remained subdued amid renewed geopolitical uncertainty and a rebound in crude oil prices after US President Donald Trump rejected Iran's proposal to reopen the Strait of Hormuz. Trump also threatened to attack Iran after the US mid-term elections. Traders remained cautious ahead of the release of India's Index of Industrial Production (IIP) data for August, scheduled to be out later in the day.

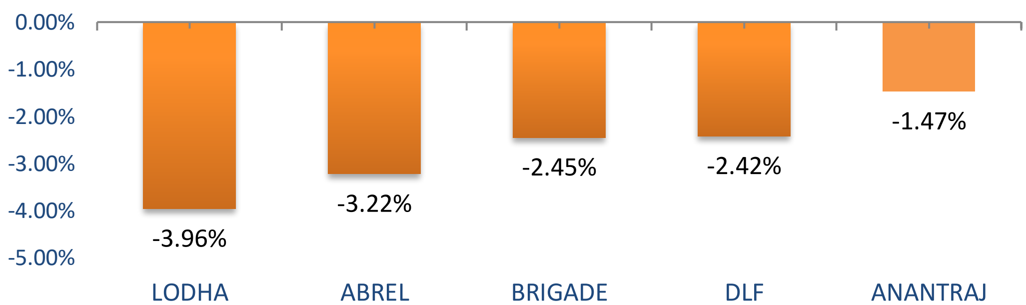
Both the Sensex and Nifty ended more than one and a half per cent lower amid broad-based selling across sectors. Banking and financial stocks were among the major drags. Sentiment also remained subdued ahead of the expiry of the Nifty monthly F&O contracts on September 29

On the global front: European stocks were trading in the green, even as investors remained cautious about climbing oil prices and elevated bond yields. Asian markets closed mostly lower, amid fresh Chinese data showed that growth in industrial profits weakened further in August. Source- AceEquity

NEWS BULLETIN

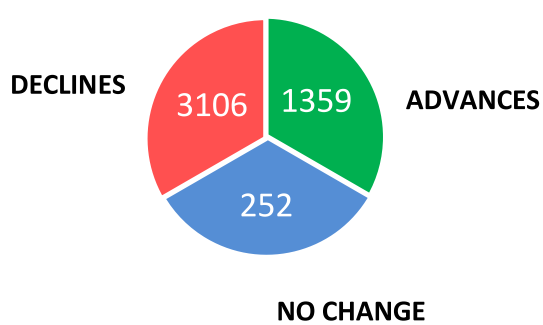
- **Azad Engineering** has inaugurated two Exclusive Lean Manufacturing Facilities for GE Vernova's Gas Power business at its Centre of Excellence & Innovation Centre in Tunikibollaram, Hyderabad, on September 28,2026.
- **NTPC and EDF Power Solutions India** have partnered to jointly develop, own and operate pumped storage projects, hydropower projects, as well as other renewable energy (RE) projects and distribution business.
- **Kalpataru Projects International** has received a Letter of Award (LoA) for the Engineering, Procurement and Construction (EPC) of a gas pipeline project in the United Arab Emirates (UAE). The order, classified as a 'Major' order, has an estimated value of more than Rs 4,000 crore.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 6,635.46
CHANGE: -141.25
CHANGE: -2.08%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.72	19.26

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