END DAY COMMENTARY

29th SEPT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	72,771.72	72,633.68	72,684.90	72,064.00	72,529.07	-242.65	-0.33
NIFTY	22,780.25	22,732.45	22,753.25	22,569.65	22,716.20	-64.05	-0.28

INDICES ENDED THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 242.65 points or 0.33% to settle at 72,529.07 and the Nifty was down by 64.05 points or 0.34% to settle at 22,716.20. The BSE Small Cap 250 was down by 0.49% and BSE 500 was down by 0.48%. On the sectoral front, Healthcare and Metal were the gaining index. On the flip side, Oil & Gas, Banks, Auto, FMCG, IT, Consumer Durables, Capital Goods, and Realty were the losing indices. Adani Ports, Sun Pharma, Tata Steel, Kotak Bank and NTPC were gainers on the Sensex; on the flip side, Titan, HCL Tech, TCS, UltraTech Cement 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
ADANIENT	2,972.9	2,831.1	5.01
ADANIPORTS	1,822.0	1,743.7	4.49
DRREDDY	1,251.9	1,221.0	2.53
SUNPHARMA	1,865.0	1,838.0	1.47
INFY	1,015.4	1,003.2	1.22

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TITAN	4,675.0	4,819.5	-3.00
WIPRO	156.79	161.56	-2.95
HCLTECH	1,222.0	1,252.6	-2.44
APOLLOHOSP	8,659.0	8,860.0	-2.27
TECHM	1,510.5	1,542.2	-2.06

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	42744466	722.70	3,052.0
RELIANCE	24106225	1,182.0	2,862.2
WIPRO	164452646	156.79	2,582.7
SBIN	26781263	964.70	2,569.4
ICICIBANK	14805465	1,292.2	1,918.8

Most Active (by volume)

Name	Qty	Pr.	Value CR
WIPRO	164452646	156.79	2,582.7
HDFCBANK	42744466	722.70	3,052.0
KOTAKBANK	32609940	406.00	1,317.5
ETERNAL	30822477	327.85	1,008.3
TATASTEEL	28158222	188.00	527.07

Indian equity markets ended lower on Tuesday, extending the previous session's losses, as renewed uncertainty over U.S.-Iran talks, continued foreign fund outflows, and elevated U.S. Treasury yields weighed on investor sentiment. The decline came despite stronger-than-expected economic data. Industrial output grew 8% year-on-year in August, beating the 6.5% forecast and July's 7.4% growth, while manufacturing output rose 9%, up from 8.2% in July.

Piyush Goyal to discuss India-US trade deal, interim trade pact during week-long US visit: Traders took note of report that Minister of Commerce and Industry of India Piyush Goyal is set to hold talks with his counterparts in the United States (US) to advance a proposed deal between the two countries and finalise an interim agreement.

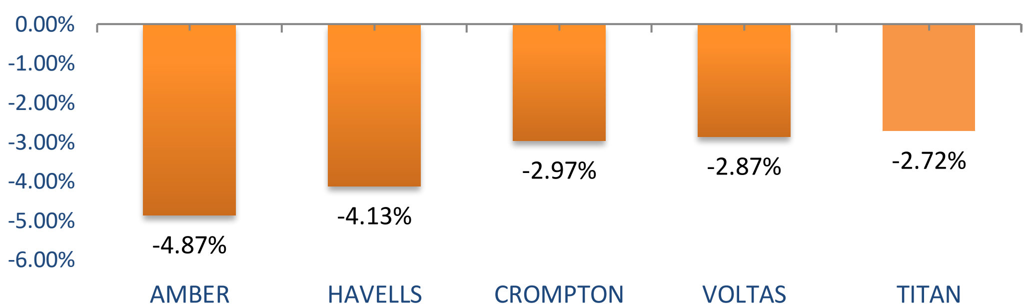
On the global front: European stocks were trading in the green, even as the sentiments remained cautious amid elevated oil prices and higher bond yields. Asian markets closed mostly in red, following the broadly negative cues from Wall Street overnight.

Source- AceEquity

NEWS BULLETIN

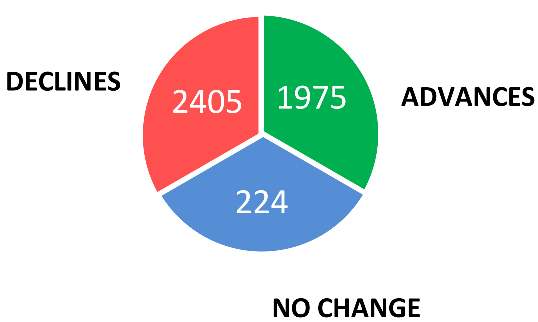
- **Bharti Airtel** has added 21.11 lakh customers in August 2026. Following this, the company's total customer base has increased to 49.16 crore with market share of 38.01% in terms of wireless (Mobile) subscribers as on August 31, 2026.
- **ITC** has acquired 13,445 equity shares (through secondary purchase), representing 52.5% of total shareholding, of Sproutlife Foods (Sproutlife) for a consideration of around Rs 645 crore.
- **Indian Railway Finance Corporation (IRFC)** has signed Rs 4,200 crore Term Loan Agreement with Damodar Valley Corporation (DVC) to finance its renewable energy projects across Jharkhand and West Bengal.

MARKET DRIVING SECTOR : CONSUMER DURABLES



S&P BSE: CONSUMER DURABLES
CLOSING: 59,453.97
CHANGE: - 1,196.81
CHANGE: -1.97%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.88

PE MULTIPLE OF NIFTY
19.21

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