

WEEKLY COMMENTARY

3rd October 2026



Hem Securities
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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,895.74	73,734.83	73,740.85	71,292.88	71,909.70	-1,986.04	-2.69
NIFTY 50	23,140.50	23,064.90	23,080.25	22,217.30	22,421.95	-718.55	-3.11

INDICES CLOSED THE WEEK WITH HEAVY LOSSES

Indian equity benchmark ended on a red note in the week ended 3 October, 2026. Key indices were not positive in any of the four sessions of the week. The S&P BSE Sensex was down by 1,986.04 points or 2.69% to settle at 71,909.70 in the week ended 3 October, 2026. The CNX Nifty was down by 718.55 points or 3.11% to settle at 22,421.95. The BSE 500 index was down by 1,131.88 or 3.20% to settle at 34,221.41. The BSE Small-Cap index was down by 236.52 points or 3.31% to settle at 6,909.40.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
KOTAK BANK	418.35	404.00	3.55
INFOSYS LTD	1035.0	1000.2	3.48
HDFC LIFE INSUR	534.20	531.00	0.60
DR REDDY'S LAB	1206.2	1201.0	0.43

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ AUTO	10045.0	11281.0	-10.96
APOLLO HOSPITAL	8133.5	8889.0	-8.50
TITAN COMPANY	4515.7	4884.0	-7.54
GRASIM INDUS	2962.0	3191.0	-7.18
JIO FINANCIAL	212.50	227.00	-6.39

MARKET STATS

Most Active (by value)			
Name	Avg Value	Pr.	Qty
HDFC BANK	10182.3	721.20	141186.83
RELIANCE	8283.8	1167.7	70941.78
KOTAK BANK	6561.8	418.35	156850.86
ICICI BANK	6343.0	1310.6	48398.07
INFOSYS LTD	5199.4	1035.0	50235.81

Most Active (by volume)			
Name	Avg Value	Pr.	Qty
WIPRO LTD	3334.4	159.35	209250.82
KOTAK BANK	6561.8	418.35	156850.86
HDFC BANK	10182.3	721.20	141186.83
TATA STEEL	2168.5	178.00	121829.64
ETERNAL LTD	3419.9	313.90	108949.53



INSTITUTIONAL NET POSITION



FII's Cash	• -34,966.07
FII's Index Future	• -8,584.38
FII's Stock Future	• +8,643.30
DII's Cash	• +33,455.30

On Monday, 28 Sept, 2026, key equity benchmarks ended sharply lower. The S&P BSE Sensex tanked 1,124 points or 1.52% to 72,771.72. On Tuesday, 29 Sept, 2026, domestic indices declined for the second consecutive session. The S&P BSE Sensex tanked 242.65 points or 0.33% to 72,529.07. On Wednesday, 30 Sept, 2026, equity indices ended lower. The S&P BSE Sensex declined 48.78 points or 0.07% to 72,480.29. On Thursday, 1 Oct, 2026, key benchmark indices ended sharply lower. The S&P BSE Sensex declined 570.59 points or 0.79% to 71,909.70. On Friday, 2 Oct, 2026, key equity benchmarks remained closed on the occasion of Mahatma Gandhi Jayanti..

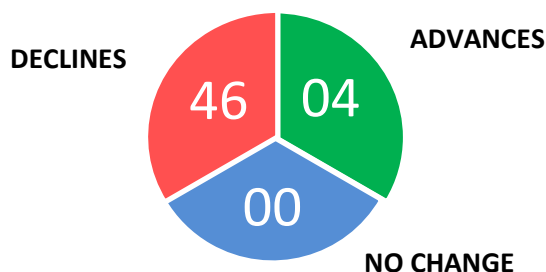
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended sharply lower as elevated US bond yields, inflation concerns and higher energy prices weighed on sentiment. Weak US consumer confidence and declining job openings added to global uncertainty, despite India's industrial production growth accelerating to 8% in August. Key indices were not positive in any of the four trading sessions of the week.

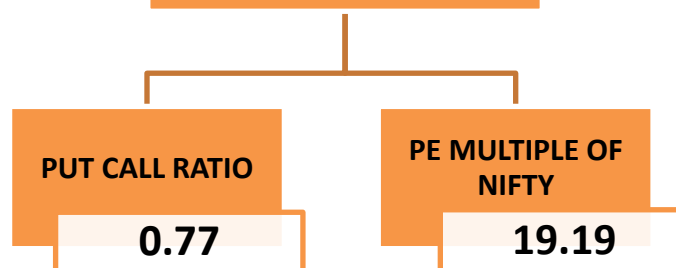
MARKET WATCH- COMING WEEK

Indian equities are likely to remain volatile next week amid geopolitical uncertainty and energy market risks, despite easing crude oil prices. Domestic focus will remain on the RBI's monetary policy decision, inflation and growth projections, final Services and Composite PMI readings, and foreign exchange reserves. Investors will also track US ISM Services PMI, trade data, FOMC minutes and consumer sentiment for cues on the Fed's policy outlook. Crude oil movements, the rupee and FII flows will remain key market drivers.

NIFTY MARKET BREADTH (W) - NEGATIVE



RATIO ANALYSIS

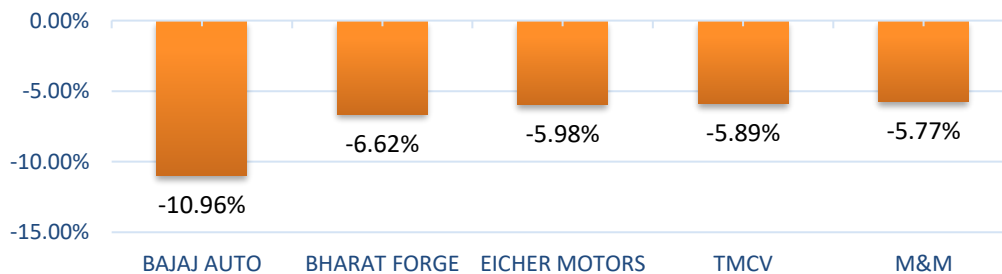




NEWS BULLETIN

- **NCC** has received two orders totaling to Rs 500.22 crore (excluding GST), during the month of September 2026. Of the two orders received, Rs 224.74 crore pertains to Buildings Division and Rs 275.48 crore pertains to Transportation Division of the company. These orders are addition to major order disclosed by the company on September 28, 2026.
- **ACME Solar Holdings**, through its wholly owned subsidiary i.e. ACME Greentech Seventh, has commissioned Phase-III of the BESS component, comprising 53.63 MW/214.52 MWh out of 300 MW / 1200 MWh (Discharge Capacity) of the FDRE Project located at Village: Kelan, Tehsil: Chhatargarh, District: Bikaner, Rajasthan on September 30, 2026.
- **Waaree Energies' wholly owned subsidiary -- Waaree Power** has commenced commercial production of its new solar inverter manufacturing line, having an annual installed capacity of 1.10 GW, at its factory situated at Sarodhi, Valsad, Gujarat. Pursuant to the above, the aggregate annual installed capacity of solar inverter manufacturing of Waaree Power stands increased from 3.05 GW to 4.15 GW

MARKET DRIVING SECTOR : AUTO



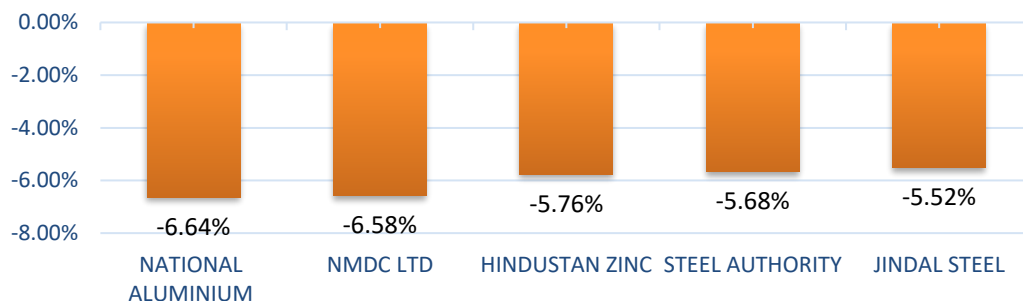
NIFTY AUTO

CLOSING: 25,384.95

CHANGE: -1582.95

CHANGE: -5.87%

MARKET DRIVING SECTOR : METAL



NIFTY METAL

CLOSING: 12,460.70

CHANGE: -626.45

CHANGE: -4.79%

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