

WEEKLY COMMENTARY

10th October 2026



Hem Securities
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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	71,909.70	72,340.95	73,067.81	71,327.75	72,472.33	+562.63	+0.78
NIFTY 50	22,421.95	22,532.40	22,776.10	22,179.90	22,520.45	+98.50	+0.44

INDICES CLOSED THE WEEK ON A POSITIVE NOTE

Indian equity benchmark ended on a green note in the week ended 10 October, 2026. Key indices were positive in three out of five sessions of the week. The S&P BSE Sensex was up by 562.63 points or 0.78% to settle at 72,472.33 in the week ended 10th October, 2026. The CNX Nifty was up by 98.50 points or 0.44% to settle at 22,520.45. The BSE 500 index was down by 28.94 or 0.08% to settle at 34,192.47. The BSE Small-Cap index was down by 26.17 points or 0.38% to settle at 6883.23

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TRENT LTD	2918.2	2580.0	13.11
KOTAK BANK	441.00	418.35	5.41
HDFC LIFE INSUR	556.65	534.20	4.20
ITC LTD	266.00	255.90	3.95
TCS LTD	2156.0	2075.0	3.90

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ADANI ENTER	2634.4	2816.8	-6.48
HERO MOTOCORP	4895.5	5168.0	-5.27
JSW STEEL	1168.0	1233.0	-5.27
HINDALCO INDUS	900.35	941.85	-4.41
BEL	368.15	383.10	-3.90

MARKET STATS

Most Active (by value)			
Name	Avg Value	Pr.	Qty
HDFC BANK	11865.9	707.25	167775.71
RELIANCE IND	8214.4	1170.3	70190.97
ICICI BANK	7721.4	1355.00	56984.49
KOTAK BANK	6772.3	441.00	153567.47
BHARTI AIRTEL	6558.1	1805.1	36330.97

Most Active (by volume)			
Name	Avg Value	Pr.	Qty
ITC LTD	5476.6	266.00	205889.60
HDFC BANK	11865.9	707.25	167775.71
KOTAK BANK	6772.3	441.00	153567.47
ETERNAL LTD	3653.1	323.45	112943.46
TATA STEEL	1742.52	173.80	100259.79



INSTITUTIONAL NET POSITION



FII's Cash	• -30,294.29
FII's Index Future	• +2,533.62
FII's Stock Future	• +8,062.31
DII's Cash	• +30,313.48

On Monday, 5 Oct, 2026, key equity benchmarks ended higher. The S&P BSE Sensex rose 472.77 points, or 0.66%, to 72,382.47. On Tuesday, 6 Oct, 2026, domestic indices ended sharply higher. The S&P BSE Sensex jumped 685.34 points or 0.95% to 73,067.81. On Wednesday, 7 Oct, 2026, equity indices ended lower. The S&P BSE Sensex declined 429.11 points or 0.59% to 72,638.70. On Thursday, 8 Oct, 2026, key benchmark indices ended sharply lower. The S&P BSE Sensex tumbled 1,045.46 points or 1.44% to 71,593.24. On Friday, 9 Oct, 2026, key equity benchmarks ended sharply higher. The S&P BSE Sensex jumped 879.09 points or 1.23% to 72,472.3

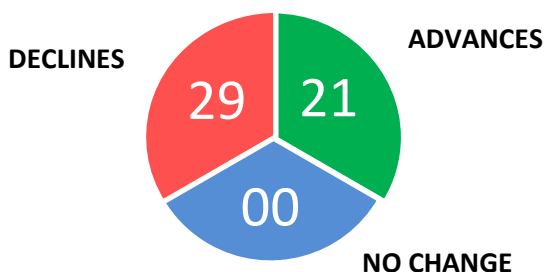
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended the week with modest gains, snapping an eight-week losing streak as easing crude oil prices and positive corporate updates supported sentiment. However, the RBI's rate hike and hawkish policy stance, along with geopolitical uncertainty and volatile global cues, kept markets under pressure. Despite sharp gains on Tuesday and Friday, the indices remained volatile throughout the week

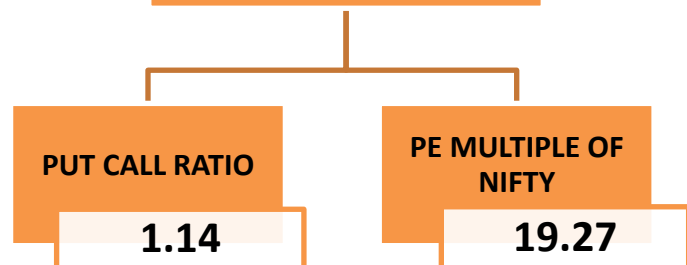
MARKET WATCH- COMING WEEK

Indian equities are likely to remain volatile amid geopolitical uncertainty, crude oil movements and FII flows. Investors will track domestic CPI and WPI inflation data, Q2 FY27 earnings, US inflation and retail sales figures, and China's inflation and trade data for cues on economic growth and monetary policy. The rupee, US Treasury yields and global market trends will also influence sentiment.

NIFTY MARKET BREADTH (W) - NEGATIVE



RATIO ANALYSIS

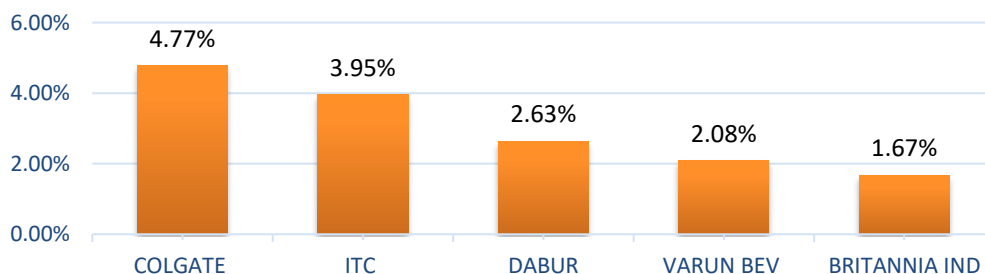




NEWS BULLETIN

- **Cochin Shipyard's wholly owned subsidiary -- Hooghly Cochin Shipyard (Hooghly-CSL)** has bagged a notable order from Heritage River Journeys. The order is for the construction of two Luxury River Cruise vessels. The company classified the order under the Notable category, indicating an order value between Rs 100 crore and Rs 250 crore.
- **KEC International** has secured new orders worth Rs 1,030 crore across various businesses. The company's Transmission & Distribution (T&D) business has secured orders for T&D projects, which includes 400 kV Transmission line in Bhutan, additional order for a 380 kV Transmission line in Saudi Arabia, and supply of towers, hardware and poles in the Americas.
- **Jubilant Pharmova's step-down subsidiary -- Jubilant Draximage Inc.,** is planning to invest 94.5 million Canadian Dollar to modernize and expand its Kirkland, Quebec facility and increase production capacity across its radiopharmaceutical portfolio pipeline. Specifically, the investment is aimed to double the production capacity of its flagship product RUBY-FILL

MARKET DRIVING SECTOR : FMCG



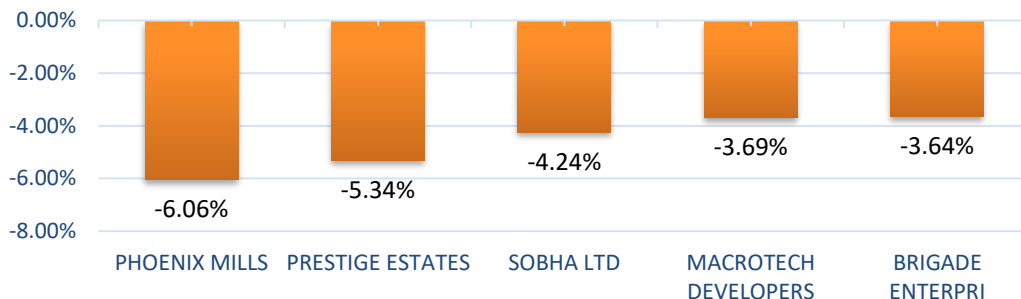
NIFTY FMCG

CLOSING: 44,864.25

CHANGE: +1074.40

CHANGE: +2.45%

MARKET DRIVING SECTOR : REALTY



NIFTY REALTY

CLOSING: 803.95

CHANGE: -31.05

CHANGE: -3.72%

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