

WEEKLY COMMENTARY

17th OCT 2026



Hem Securities
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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	72,472.33	72,771.32	74,778.78	71,676.10	74,729.27	+2,256.95	+3.11
NIFTY 50	22,520.45	22,593.20	23,149.85	22,288.45	23,146.15	+625.70	+2.78

INDICES CLOSED THE WEEK WITH STRONG GAINS

Indian equity benchmark ended on a green note in the week ended 17 October, 2026. Key indices were positive in three out of five sessions of the week. The S&P BSE Sensex was up by 2256.95 points or 3.11% to settle at 74,729.27 in the week ended 17 October, 2026. The Nifty was up by 625.70 points or 2.78% to settle at 23,146.15. The BSE 500 index was up by 653.58 points or 1.91% to settle at 34,846.05. The BSE Small-Cap index was up by 32.59 points or 0.47% to settle at 6,915.82.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TECH MAHINDRA	1790.0	1514.1	18.22
TCS	2465.0	2156.0	14.33
INFOSYS	1161.2	1023.4	13.46
WIPRO	184.40	162.57	13.43
HCL TECH	1380.00	1216.7	13.42

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
NESTLE INDIA	1265.5	1333.0	-5.06
L&T	3627.1	3703.3	-2.06
APOLLO HOSPITAL	7890.0	8027.5	-1.71
SBI LIFE INSURAN	1656.8	1684.6	-1.65
ITC	263.50	266.00	-0.94

MARKET STATS

Most Active (by value)

Name	Avg Value	Pr.	Qty
TCS	11844.7	2465.0	48051.64
INFOSYS	10904.0	1161.2	93902.90
BHARTI AIRTEL	10048.3	1905.0	52747.43
HDFC BANK	9277.0	728.85	127283.98
RELIANCE	8956.4	1211.2	73946.51

Most Active (by volume)

Name	Avg Value	Pr.	Qty
TATA STEEL	2260.1	175.50	128780.68
HDFC BANK	9277.0	728.85	127283.98
WIPRO	2298.9	184.40	124674.30
KOTAK BANK	5441.1	447.40	121616.39
INFOSYS	10904.0	1161.2	93902.90



INSTITUTIONAL NET POSITION



FII's Cash	• -8,990.50
FII's Index Future	• +3,068.18
FII's Stock Future	• +4,631.87
DII's Cash	• +7,812.81

On Monday, 12 Oct, 2026, key benchmark indices ended lower. The S&P BSE Sensex declined 547.65 points or 0.76% to 71,924.68. On Tuesday, 13 Oct, 2026, domestic equity indices ended higher. The S&P BSE Sensex jumped 1,109.10 points or 1.54% to 73,033.78. On Wednesday, 14 Oct, 2026, equity indices ended lower. The S&P BSE Sensex declined 251.89 points or 0.34% to 72,781.99. On Thursday, 15 Oct, 2026, key benchmark indices ended on higher note. The S&P BSE Sensex surged 1,533.72 points or 2.11% to 74,315.6. On Friday, 16 Oct, 2026, key equity indices closed higher. The S&P BSE Sensex jumped 413.66 points or 0.56% to 74,729.27.

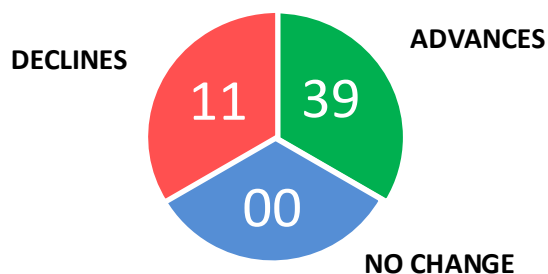
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended higher, snapping the eight-week losing streak, supported by the IMF's upward revision of India's GDP growth forecast to 7% for FY27 and FY28. However, rising CPI and WPI inflation raised concerns over price pressures, while mixed global cues and RBI's tighter forex regulations kept investors cautious.

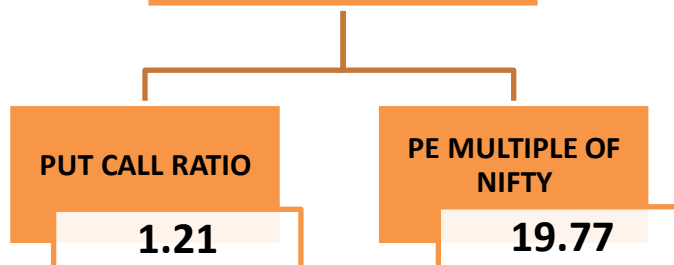
.MARKET WATCH- COMING WEEK

Indian equities are likely to remain positive but will also be influenced by corporate earnings, global market cues and key economic data releases. Investors will track infrastructure output, HSBC Flash PMI data and RBI forex reserves, while developments in crude oil prices, FII activity and global interest rate expectations will guide market sentiment. Q2 FY27 earnings from major companies across banking, IT, pharmaceuticals and automobiles will remain in focus.

NIFTY MARKET BREADTH (W) - POSITIVE



RATIO ANALYSIS

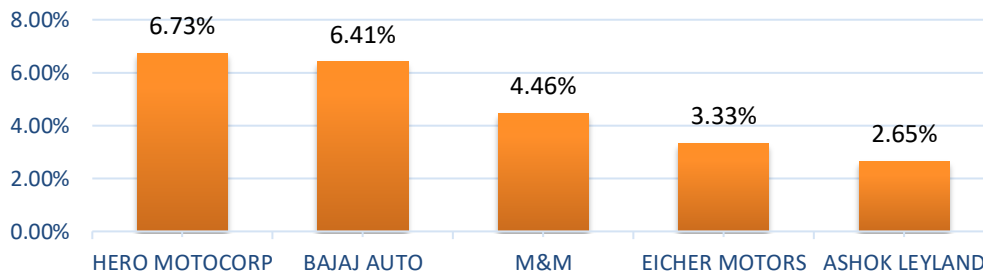




NEWS BULLETIN

- **Hero MotoCorp** has launched the all-new Xtreme 160R 4V and refreshed Xtreme 250R. The twin launch marks a significant step in strengthening the company's premium motorcycle portfolio, bringing together sharper streetfighter styling, exhilarating performance and advanced rider-focused technology across two key segments.
- **GMR Airports and Aramex**, a logistics and transportation solutions provider, have signed an initial pact to strengthen Aramex logistics capabilities at all GMR-operated airports and support seamless movement of international shipments for MSMEs.
- **Zydus Lifesciences' joint venture (JV) -- Zydus Sunshine Lifesciences** has inked an agreement with the Board of Investment of Sri Lanka to establish a pharmaceutical manufacturing facility in the BOI zone in Horana, Sri Lanka. The Zydus Sunshine Lifesciences is a joint venture between the company and Sunshine Healthcare, part of Sunshine Holdings PLC.

MARKET DRIVING SECTOR : AUTO



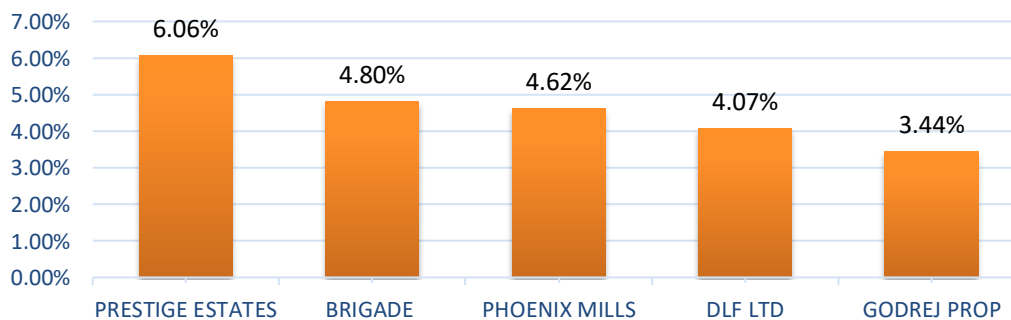
NIFTY AUTO

CLOSING: 25768.50

CHANGE: +908.60

CHANGE: +3.65%

MARKET DRIVING SECTOR : REALTY



NIFTY REALTY

CLOSING: 825.95

CHANGE: +22.00

CHANGE: +2.74%

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