END DAY COMMENTARY

21st OCT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,852.90	74,337.93	74,682.19	73,229.45	73,709.69	-143.21	-0.19
NIFTY	22,888.95	23,016.00	23,120.90	22,649.90	22,811.35	-77.60	-0.34

INDICES ENDED THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 143.21 points or 0.19% to settle at 73,709.69 and the Nifty was down by 77.60 points or 0.34% to settle at 22,811.35. The BSE Small Cap 250 was down by 2.16% and BSE 500 was down by 0.95%. On the sectoral front, only IT was the gaining index. On the flip side, Auto, Realty, Banks, Metal, Oil & Gas, Healthcare, Capital Goods, FMCG, and Consumer Durables all were the losing indices. HCL Tech, Infosys, Tech Mahindra, TCS and Ultratech Cement were the top gainers on the Sensex; on the flip side, Bajaj Finance, Eternal, Trent, Axis Bank, and NTPC were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a green note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,168.0	1,130.7	3.30
HCLTECH	1,424.2	1,379.9	3.21
TECHM	1,834.7	1,779.1	3.13
TCS	2,529.0	2,460.9	2.77
ULTRACEMCO	10,849	10,650	1.87

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BAJFINANCE	926.00	957.35	-3.27
BSE	3,248.3	3,336.0	-2.63
ETERNAL	312.35	320.20	-2.45
EICHERMOT	7,170.5	7,349.0	-2.43
TRENT	2,822.0	2,891.6	-2.41

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
ICICIBANK	17537734	1,385.0	2,446.1
INFY	18597997	1,168.0	2,162.4
RELIANCE	17607823	1,209.0	2,142.3
HDFCBANK	26573703	706.95	1,878.3
BAJFINANCE	18557070	926.00	1,729.2

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	30152462	312.35	936.90
HDFCBANK	26573703	706.95	1,878.3
TATASTEEL	21577704	172.45	372.91
ITC	21000241	262.00	551.07
INFY	18597997	1,168.0	2,162.4

Indian equity markets erased early gains to end lower on Wednesday, as elevated crude oil prices, fuelled by mounting supply concerns in West Asia and a drawdown in US crude inventories, weighed on investor sentiment. Heavyweight stocks in the Banking, financial and auto sectors were among the major laggards, while gains in IT stocks helped limit the losses.

India's engineering exports likely to hit all-time high of $150 billion in FY27: Traders took note of Engineering Export Promotion Council (EEPC) Chairman Pankaj Chadha's statement that India's engineering exports are expected to touch an all-time high of $150 billion in the current fiscal (FY27).

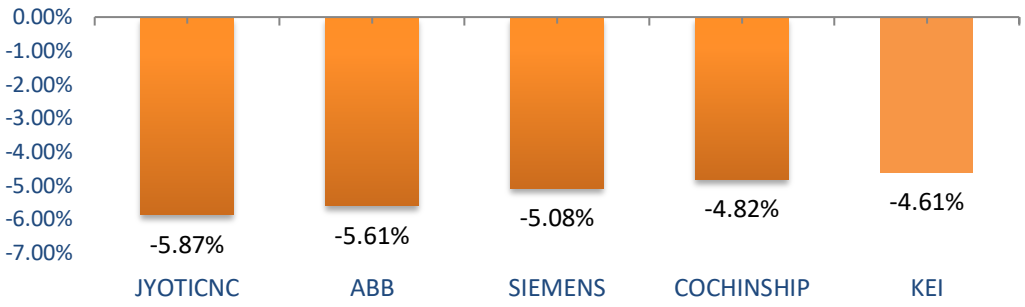
On the global front: European stocks were trading mostly in green, while Asian stock markets ended mostly higher, after reports suggested that a new peace proposal put forward by Qatar and Pakistan has received positive responses from Washington and Tehran, raising hopes that a breakthrough to halt the war could be announced possibly this week.

Source- AceEquity

NEWS BULLETIN

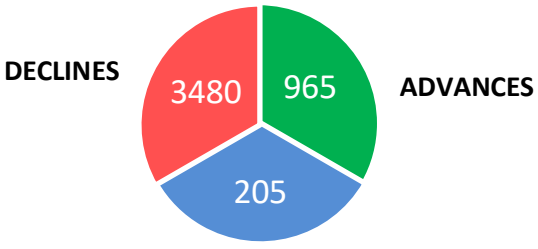
- **Larsen & Toubro's (L&T)** business vertical -- The Public Spaces, Airports & Health (PAH) has secured two important orders (Large) in New Delhi and Andhra Pradesh. L&T classifies orders in the Rs 2,500 crore to Rs 5,000 crore range as 'Large'.
- **GRP** has successfully completed the installation of solar power plants at Ankleshwar and Panoli facilities in Gujarat, and commenced commercial generation of solar power with effect from October 19, 2026. The 8 MWp project was completed with a Rs 2.60 crore cash investment.
- **Alembic Pharmaceuticals'** wholly owned subsidiary -- Alembic Global Holding SA has incorporated a wholly owned subsidiary named 'Alvesta Pharmaceuticals FZCO' in Dubai, United Arab Emirates.

MARKET DRIVING SECTOR : CAPITAL GOODS



S&P BSE: CAPITAL GOODS
CLOSING: 70,687.98
CHANGE: -2,110.73
CHANGE: -2.90%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.78	19.26

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