END DAY COMMENTARY

22nd OCT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,709.69	73,343.33	73,720.83	73,005.11	73,249.39	-460.30	-0.62
NIFTY	22,811.35	22,687.75	22,785.00	22,554.85	22,687.65	-123.70	-0.54

INDICES ENDED THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 460.30 points or 0.62% to settle at 73,249.39 and the Nifty was down by 123.70 points or 0.54% to settle at 22,687.65. The BSE Small Cap 250 was down by 0.92% and BSE 500 was down by 0.64%. On the sectoral front, only Healthcare was the gaining index. On the flip side, Auto, Realty, Banks, Metal, Oil & Gas, IT, Capital Goods, FMCG, and Consumer Durables were the losing indices. Bajaj Finance, Ultratech Cement, ICICI Bank, Sun Pharma and SBI Bank were the top gainers on the Sensex; on the flip side, Reliance, Eternal, HDFC Bank, Power Grid, and Trent 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
BAJFINANCE	942.10	926.00	1.74
CIPLA	1,330.9	1,314.0	1.29
ULTRACEMCO	10,958	10,849	1.00
ICICIBANK	1,398.5	1,385.0	0.97
BAJAJ-AUTO	10,155	10,072	0.82

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
NESTLEIND	1,189.9	1,223.9	-2.78
ETERNAL	304.45	312.35	-2.53
HDFCLIFE	528.35	539.65	-2.09
TMPV	270.00	275.70	-2.07
RELIANCE	1,184.5	1,209.0	-2.03

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	60280576	694.05	4,190.3
ETERNAL	85504573	304.45	2,662.3
BHARTIARTL	12647520	1,895.0	2,407.0
ICICIBANK	16108318	1,398.5	2,242.7
INFY	17007168	1,153.3	1,968.7

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	85504573	304.45	2,662.3
HDFCBANK	60280576	694.05	4,190.3
INFY	17007168	1,153.3	1,968.7
KOTAKBANK	16857402	437.00	738.14
TATASTEEL	16694229	172.33	284.75

Indian equity markets remained under pressure on Thursday, with the Sensex and Nifty extending their losing streak to three consecutive sessions amid broad-based selling across major sectors and escalating tensions in West Asia. However, the losses were limited by a positive turnaround in foreign institutional investors (FIIs) flows, as FIIs emerged as net buyers on Wednesday, purchasing equities worth Rs 1,022.32 crore.

Nine key infrastructure sectors' output growth rises to 7.9% in September: Traders overlooked the Ministry of Commerce & Industry's latest data showing that nine key infrastructure sectors' output growth increased to 7.9% in September 2026 against 3.1% in the year-ago month driven by strong performance of iron ore, electricity and cement segments.

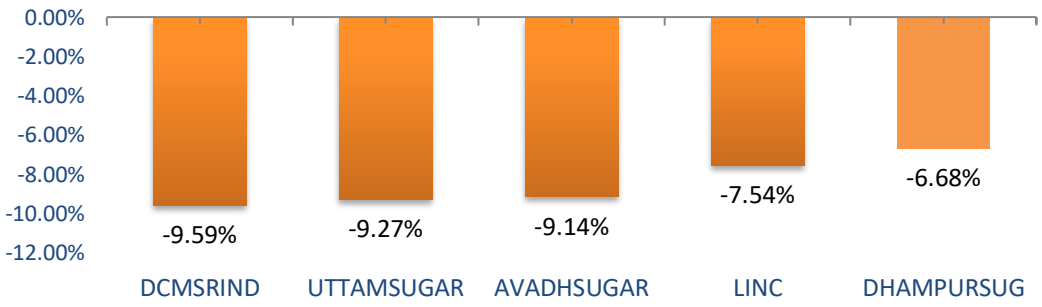
On the global front: European stocks were trading in red as escalating tension in Middle East spiked up global crude oil prices. Asian stock markets are trading mostly lower, despite the positive cues from US markets overnight.

Source- AceEquity

NEWS BULLETIN

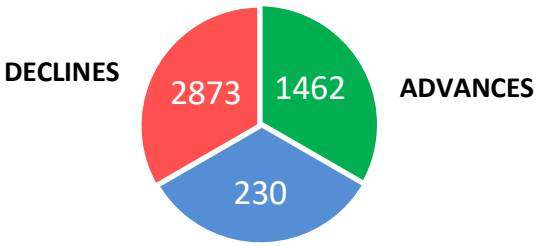
- **Larsen & Toubro's (L&T)** Heavy Engineering business vertical has dispatched 8th Steam Generator for India's 700 MWe Pressurised Heavy Water Reactors (PHWRs) fleet civil nuclear power programme.
- **Zydus Lifesciences'** subsidiary -- Zylidac Bio and Prolific Machines (Prolific) have partnered to scale Prolific's platform from early development through GMP production.
- **HCL Technologies** has launched its AI-powered verification and validation (V&V) offering, powered by NVIDIA's simulation stack, agentic capabilities and open model strategy. Designed for automotive vehicle manufacturers and Tier 1 suppliers, the offering combines agentic AI, physical AI-powered simulation and intelligent orchestration.

MARKET DRIVING SECTOR : FMCG



S&P BSE: FMCG
CLOSING: 16,339.06
CHANGE: -234.21
CHANGE: -1.41%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.88	19.16

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