END DAY COMMENTARY

27th OCT 2026

Hem Securities
Building your wealth through values

BROKING | INVESTMENT BANKING | RESEARCH | DISTRIBUTION | DEPOSITORY | PMS

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,606.75	73,484.38	73,762.98	73,179.41	73,598.67	-8.08	-0.01
NIFTY	22,753.20	22,708.80	22,829.75	22,636.85	22,749.75	-3.45	-0.02

INDICES ENDED THE VOLATILE DAY ON A FLAT NOTE

The 30-share BSE Sensex was down by 8.08 points or 0.01% to settle at 73,598.67 and the Nifty was down by 3.45 points or 0.02% to settle at 22,749.75. The BSE Small Cap 250 was up by 2.00% and BSE 500 was up by 0.60%. On the sectoral front, Auto, Realty, Healthcare, Metal, Oil & Gas, Capital Goods, FMCG, and Consumer Durables all were the gaining index. On the flip side, Banks and IT were the losing indices. Bharti Airtel, Trent, Maruti, Power Grid and Eternal were the top gainers on the Sensex; on the flip side, SBI Bank, Axis Bank, TCS, Asian Paint, and HDFC Bank 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
TATACONSUM	1,000.0	936.50	6.78
BHARTIARTL	1,978.8	1,917.5	3.20
BAJAJ-AUTO	10,390	10,071	3.17
BSE	3,441.1	3,359.0	2.44
TRENT	2,820.6	2,754.0	2.42

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ASIANPAINT	2,277.0	2,322.0	-1.94
COALINDIA	398.00	405.00	-1.73
GRASIM	2,900.8	2,950.0	-1.67
SBIN	945.10	960.80	-1.63
TCS	2,496.9	2,535.0	-1.50

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	40614930	680.20	2,776.6
BHARTIARTL	13054163	1,978.8	2,557.9
INFY	20117848	1,163.0	2,324.2
ICICIBANK	16183741	1,386.9	2,244.1
RELIANCE	13067787	1,196.2	1,559.9

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	40614930	680.20	2,776.6
ETERNAL	28541791	331.00	934.37
ITC	27659894	260.00	714.43
TATASTEEL	27060892	171.42	462.63
KOTAKBANK	25727833	442.50	1,138.0

Indian equity markets ended Tuesday's session flat with a negative bias, as the Sensex and the Nifty remained volatile throughout the day. The benchmarks struggled to establish a clear direction during the day, amid elevated crude oil prices, geopolitical uncertainties and caution ahead of the US Federal Reserve's policy decision. Traders also remained cautious as the exchange data showed Foreign Institutional Investors (FIIs) offloaded equities worth Rs 1,462.49 crore on Monday.

India, US conclude most of discussions for proposed bilateral trade pact: Union Commerce Minister Piyush Goyal has said that most of the discussions between India and the US on the proposed bilateral trade deal have been completed, and the two sides are now fine-tuning the agreement.

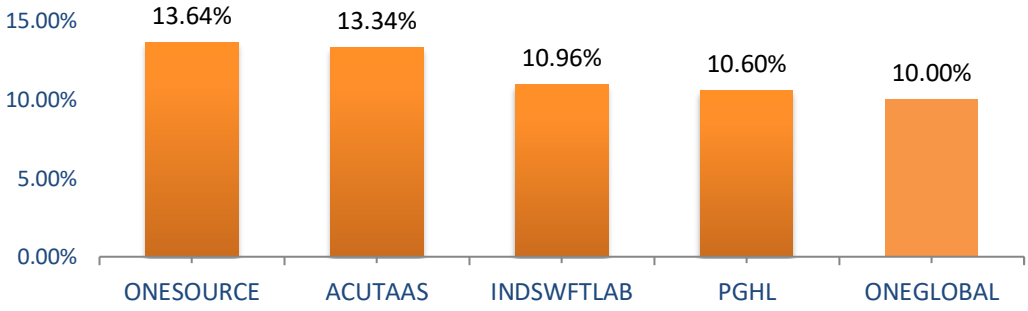
Mixed global cues: European markets were trading mostly in green, while Asian markets ended mixed on Tuesday, as investors awaited earnings from major U.S. technology companies and the outcome of a slew of central bank meetings this week for direction.

Source- AceEquity

NEWS BULLETIN

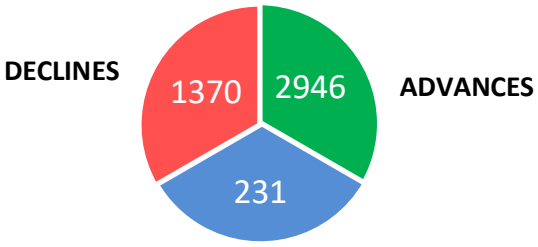
- **Tata Power** Company has signed a Memorandum of Understanding (MoU) with Bharat Petroleum Corporation (BPCL) for the development of 110 kV power infrastructure to meet the 90 MW power requirement of BPCL's Petro Resid Fluidized Catalytic Cracking Unit (PRFCCU) project at its Mumbai Refinery.
- **Bharti Airtel** has added 26.92 lakh customers in September 2026. Following this, the company's total customer base has increased to 49.43 crore with market share of 38.02% in terms of wireless (Mobile) subscribers as on September 30, 2026.
- **One 97 Communications (Paytm)** has secured approval to make an additional investment of up to Rs 500 crore in its wholly owned subsidiary -- Paytm Cloud Technologies (PCTL).

MARKET DRIVING SECTOR : HEALTHCARE



S&P BSE: HEALTHCARE
CLOSING: 48,909.83
CHANGE: +1,088.40
CHANGE: +2.28%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.06	19.18

For Disclosure & Disclaimer, click here