END DAY COMMENTARY

28th OCT 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,598.67	73,253.44	73,525.44	72,603.57	73,246.03	-352.64	-0.48
NIFTY	22,749.75	22,678.00	22,778.05	22,497.70	22,698.85	-50.90	-0.22

INDICES ENDED THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 352.64 points or 0.48% to settle at 73,246.03 and the Nifty was down by 50.90 points or 0.22% to settle at 22,698.85. The BSE Small Cap 250 was up by 0.37% and BSE 500 was down by 0.04%. On the sectoral front, Auto, Banks, Healthcare, Capital Goods, and Consumer Durables were the gaining indices. On the flip side, Metal, Oil & Gas, Realty, FMCG and IT were the losing indices. Larsen and Toubro, Trent, State Bank of India, Axis Bank and Indigo were the top gainers on the Sensex; on the flip side, Reliance, Infosys, Tech Mahindra, TCS, and Bharti Airtel 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
APOLLOHOSP	8,137.0	7,791.5	4.43
LT	3,801.3	3,665.1	3.72
TRENT	2,913.9	2,820.6	3.31
SBILIFE	1,666.7	1,633.0	2.06
INDIGO	4,690.0	4,596.5	2.03

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,123.1	1,163.0	-3.43
RELIANCE	1,158.0	1,196.2	-3.19
ONGC	224.89	229.85	-2.16
TECHM	1,776.6	1,811.4	-1.92
BHARTIARTL	1,948.1	1,978.8	-1.55

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
BHARTIARTL	14502415	1,948.1	2,826.8
RELIANCE	21866598	1,158.0	2,564.5
LT	6174490	3,801.3	2,362.6
HDFCBANK	28534206	685.30	1,940.6
INFY	15636449	1,123.1	1,740.9

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	28534206	685.30	1,940.6
RELIANCE	21866598	1,158.0	2,564.5
ETERNAL	21735164	326.00	713.11
KOTAKBANK	16835584	440.00	743.34
INFY	15636449	1,123.1	1,740.9

The Wednesday's trading session remained sluggish for Indian equity markets, with the Sensex and Nifty ending lower amid heightened global uncertainties and higher crude oil prices. After witnessing sharp losses in early deals, indices staged recovery in noon deals but failed to trade above their neutral lines, as weakness in information technology stocks weighed heavily on benchmark indices, while concerns ahead of the US Federal Reserve's policy decision kept investors cautious.

India hopes to boost exports to China, ASEAN in coming years: Commerce and Industry Minister Piyush Goyal has said that India is open to Chinese suppliers meeting its growing import needs, even as it will take action through established legal processes against any unfair pricing. He expressed hope that India would become a major exporter to China and the ASEAN region in the coming years.

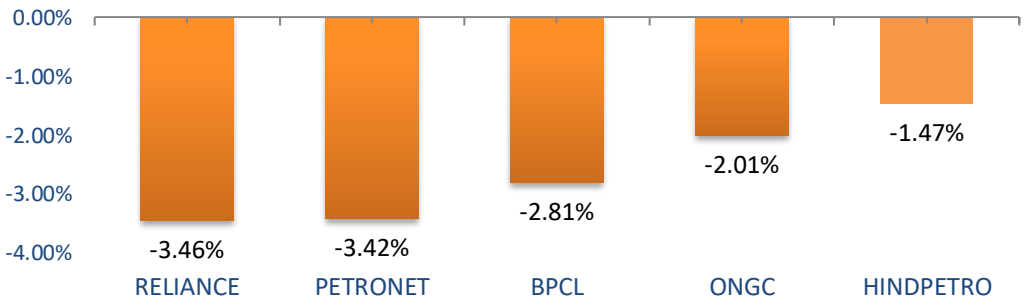
Mixed global cues: European markets were trading mostly in red, while Asian markets ended mostly higher. Traders awaited the 2026 U.K. autumn budget, earnings from big tech companies and the U.S. Federal Reserve's interest-rate decision.

Source- AceEquity

NEWS BULLETIN

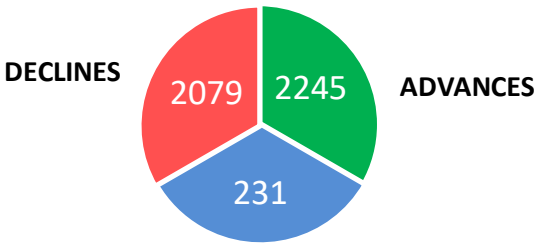
- **HCL Technologies** has launched an AI-powered nano Global Capability Center (GCC) offering, built on Amazon Web Services (AWS), to help enterprises move from AI experimentation to high-value business outcomes.
- **SBI Cards and Payment Services and Air India**, India's leading global airline, have entered into partnership to develop a new co-brand Visa-powered credit card program that will offer a rewarding suite of travel and lifestyle benefits to members of Air India's Maharaja Club loyalty programme.
- **Exide Industries** has invested around Rs 150 crore by way of subscription in the equity share capital in its wholly owned subsidiary, Exide Energy Solutions (EESL), on rights basis.

MARKET DRIVING SECTOR : OIL & GAS



S&P BSE: OIL & GAS
CLOSING: 24,261.97
CHANGE: -516.84
CHANGE: -2.09%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.08	19.03

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