END DAY COMMENTARY

09th NOV 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,999.40	81,327.29	81,339.41	80,519.31	81,106.65	+107.25	+0.13
NIFTY	24,986.40	25,076.40	25,084.05	24,838.75	25,044.65	+58.25	+0.23

INDICES ENDED THE DAY ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 107.25 points or 0.13% to settle at 81,106.65 and the Nifty was up by 58.25 points or 0.23% to settle at 25,044.65. The BSE Small Cap 250 was down by 0.15% and BSE 500 was up by 0.23%. On the sectoral front, Oil & Gas, Realty, Auto, Banks, Healthcare, Capital Goods, and Consumer Durables were the gaining indices. On the flip side, Metal, FMCG and IT were the losing indices. State Bank of India, Trent, Larsen and Toubro, NTPC and HDFC Bank were the top gainers on the Sensex; on the flip side, HCL Tech, Tata Steel, Ultratech Cement, Bajaj Finance and Tech Mahindra 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
SBIN	1,042.0	1,016.0	2.56
TRENT	3,119.2	3,057.5	2.02
NESTLEIND	1,297.8	1,273.5	1.91
NTPC	328.75	322.70	1.87
LT	4,185.0	4,110.0	1.82

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TATASTEEL	184.85	190.20	-2.81
HCLTECH	1,407.0	1,442.0	-2.43
ULTRACEMCO	12,275	12,499	-1.79
ITC	278.80	283.45	-1.64
BAJFINANCE	1,064.8	1,081.7	-1.56

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	64826814	798.15	5150.9
ICICIBANK	27542158	1,589.0	4355.5
RELIANCE	19734153	1,324.4	2598.1
SBIN	24065897	1,042.0	2497.4
LT	3251721	4,185.0	1347.6

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	64826814	798.15	5150.9
TATASTEEL	49905496	184.85	930.48
ICICIBANK	27542158	1,589.0	4355.5
SBIN	24065897	1,042.0	2497.4
RELIANCE	19734153	1,324.4	2598.1

Indian equity markets witnessed a volatile trading session on Monday, with both the Sensex and Nifty closing marginally higher after recovering from early losses. Gains in banking and select heavyweight stocks, helped offset weakness in IT and metal stocks, lending support to overall market sentiment. Meanwhile, U.S. President Donald Trump said he was highly unlikely to order new Iran attacks while talks to end the conflict make progress.

States' capital expenditure likely to increase 10-12% in FY27: Some support came with Crisil Ratings' report stating that states' capital expenditure is expected to increase 10-12 per cent to about Rs 8.5 lakh crore in FY27, driven by higher central assistance and improved fiscal flexibility.

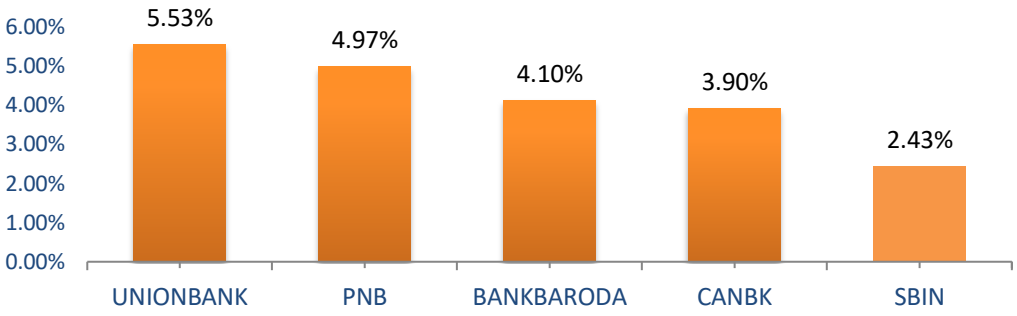
On the global front: European stocks were trading higher ahead of key U.S. inflation data and earnings from major AI companies, including CoreWeave, Cisco and Applied Materials, due later in the week. Asian markets traded mostly higher, supported by gains in Taiwan, Japan amid a recovery in semiconductor stocks after last week's decline.

Source- AceEquity

NEWS BULLETIN

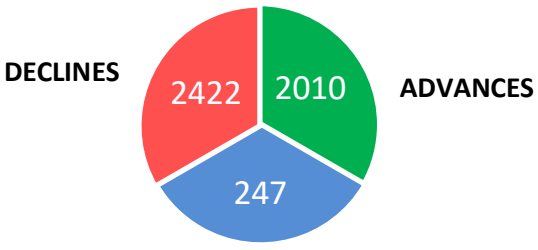
- **Tata Power** Company is strengthening Mumbai's electricity distribution infrastructure which serves over 8 lakh consumers with 60 MWh of operational Battery Energy Storage Systems (BESS) across Mahalaxmi, Saki and Mankhurd.
- **Meesho** has completed the first and second tranche of the acquisition of 92.74% of the share capital of Kirana Club, a company incorporated under the laws of Singapore and Retail Pulse Labs (RPLPL).
- **Bharat Heavy Electricals (BHEL)** has received Notification of Award (NoA) from Power Grid Corporation of India, on behalf of its Project SPV Company, for establishment of 2 Nos. +300/-200 MVAR Synchronous Condenser at Barmer-II HVDC Terminal Station. The project is valued at Rs 600 crore to Rs 900 crore, excluding GST.

MARKET DRIVING SECTOR : BANKEX



S&P BSE: BANKEX
CLOSING: 67,235.21
CHANGE: + 937.44
CHANGE: +1.41%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.15	20.70

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