END DAY COMMENTARY

22th SEP 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,626.23	82,151.07	82,583.16	81,997.29	82,159.97	- 466.26	- 0.56
NIFTY	25,327.05	25,238.10	25,331.70	25,151.05	25,202.35	- 124.70	- 0.49

INDICES START THE WEEK WITH NEGATIVE NOTE

The 30-share BSE Sensex was down by 466.26 points or 0.56% to settle at 82,159.97 and the Nifty was down by 124.70 points or 0.49% to settle at 25,202.35. The BSE Mid-Cap was down by 0.78% and BSE Small Cap was down by 0.71%. On the sectoral front, Metal and Oil & Gas were gaining indices; on the flip side, IT, Healthcare, Auto, Banks, FMCG, Capital Goods, Realty and Consumer Durables were losing indices. Eternal, Bajaj Finance, Adani Ports, Ultratech Cement and Axis Bank were the top gainers on the Sensex; on the flip side, Tech Mahindra, TCS, Infosys, HCL Tech and Tata Motors were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a negative note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,624.50	2,524.00	3.98
ETERNAL	341.95	336.55	1.60
BAJFINANCE	1,006.00	992.45	1.37
ADANIPORTS	1,445.00	1,427.80	1.20
ULTRACEMCO	12,645.00	12,508.00	1.10

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TECHM	1,507.20	1,553.80	-3.00
TCS	3,075.50	3,169.20	-2.96
INFY	1,500.90	1,540.20	-2.55
CIPLA	1,542.00	1,575.80	-2.14
WIPRO	250.49	255.88	-2.11

Most Active (by value)

Name	Qty	Pr.	Value CR
INFY	1,56,55,204	1,500.90	2,347.83
ADANIENT	70,22,985	2,624.50	1,836.85
ICICIBANK	88,47,948	1,402.20	1,241.61
TCS	36,34,901	3,075.50	1,120.59
RELIANCE	77,57,970	1,390.90	1,086.82

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	2,86,26,249	341.95	977.07
TATASTEEL	2,09,70,704	171.40	359.42
WIPRO	1,57,84,007	250.49	394.87
INFY	1,56,55,204	1,500.90	2,347.8
BEL	1,08,84,230	406.40	443.02

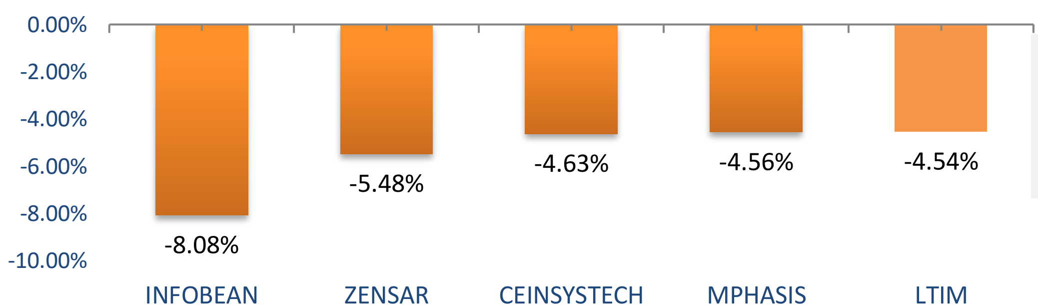
Indian equity benchmarks ended lower with cut of around half percent on Monday ahead of weekly F&O expiry. Indices made a negative start, weighed down by IT stocks amid concerns over the US President Donald Trump's decision to raise H-1B visa fees to $1,00,000 per worker. In the final leg of the session, markets slipped further, ending near the day's low points. Traders remained cautious as the labour ministry in its latest data stated that retail inflation for farm and rural workers increased to 1.07 per cent and 1.26 per cent in August 2025 from 0.77 per cent and 1.01 per cent, respectively, in July. Traders paid no head toward the Reserve Bank of India has said that India's forex reserves jumped $4.698 billion to $702.966 billion for the week ended September 12, 2025. Traders overlooked Commerce and Industry Minister Piyush Goyal's statement that the UAE companies are looking at multiple sectors, such as infrastructure, data centres, banking, startups and logistics, in India to increase their investments.

On Global front, European markets were trading in red, as investors awaited a key U.S. inflation reading as well as comments from several Federal Reserve officials this week for additional clues on the Federal Reserve's rate trajectory. Asian markets ended mixed following the Bank of Japan's announcement of sale of exchange-traded funds. Source:AceEquity

NEWS BULLETIN

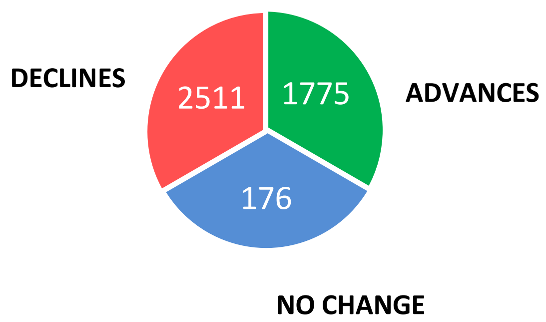
- **Avantel** has secured a purchase order worth Rs 19.33 crore (including Taxes) from M/s Larsen & Toubro for the service of Satcom Products. The order is to be executed by July 2026. Earlier, the company had secured purchase order worth Rs 12.51 crore (including taxes) from M/s Bharat Electronics for supply of Satcom Products.
- **PNC Infratech** has received LoA from BSRDC for the Project namely 'Construction of High Level Bridge and Approach Road on Hathouri-Atrar-Bavangama-Aurai Road in Bihar. Broad consideration or size of the order is Rs 495.54 crore and is to be executed within around 3 years.
- **AAA Technologies** has received an order worth around Rs 79 lakh. The order is for conducting security audit of IT Infrastructure at State Level Pollution Control Board.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 34,988.20
CHANGE: - 980.23
CHANGE: - 2.73%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.72	22.14

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