END DAY COMMENTARY

26th SEP 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	81,159.68	80,956.01	81,033.09	80,332.41	80,426.46	-733.22	-0.90
NIFTY	24,890.85	24,818.55	24,868.60	24,629.45	24,654.70	-236.15	-0.95

BOURSES CLOSED THE WEEK IN DEEP RED

The 30-share BSE Sensex was down by 733.22 points or 0.90% to settle at 80,426.46 and the Nifty was down by 236.15 points or 0.95% to settle at 24,654.70. The BSE Mid-Cap was down by 1.96% and BSE Small Cap was down by 2.05%. On the sectoral front, there was no gaining index; on the flip side, IT, Metal, Realty, FMCG, Auto, Banks, Healthcare, Oil & Gas, Capital Goods and Consumer Durables were the losing indices. Larsen & Toubro, Tata Motors, ITC and Reliance were the top gainers on the Sensex; on the flip side, Mahindra & Mahindra, Eternal, Tata Steel, Bajaj Finance and Sunpharma 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 positive note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
LT	3,743.00	3,644.40	2.71
TATAMOTORS	673.95	664.30	1.45
ITC	405.00	400.10	1.22
EICHERMOT	7,035.00	6,986.00	0.70
RELIANCE	1,379.00	1,372.40	0.48

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INDUSINDBK	712.00	740.75	-3.88
M&M	3,400.00	3,530.00	-3.68
TATASTEEL	167.35	172.38	-2.92
ETERNAL	322.90	332.25	-2.81
BAJFINANCE	985.00	1,012.75	-2.74

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
TITAN	75,24,068	3,333.00	2,509.54
ICICIBANK	1,83,42,280	1,362.50	2,500.66
LT	58,70,301	3,743.00	2,196.28
HDFCBANK	1,48,74,656	944.25	1,407.07
RELIANCE	98,79,109	1,379.00	1,359.73

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	2,68,40,537	322.90	871.30
TATASTEEL	2,01,57,657	167.35	340.68
ICICIBANK	1,83,42,280	1,362.50	2,500.6
WIPRO	1,69,99,628	236.50	402.72
TATAMOTOR	1,57,80,434	673.95	1,063.4

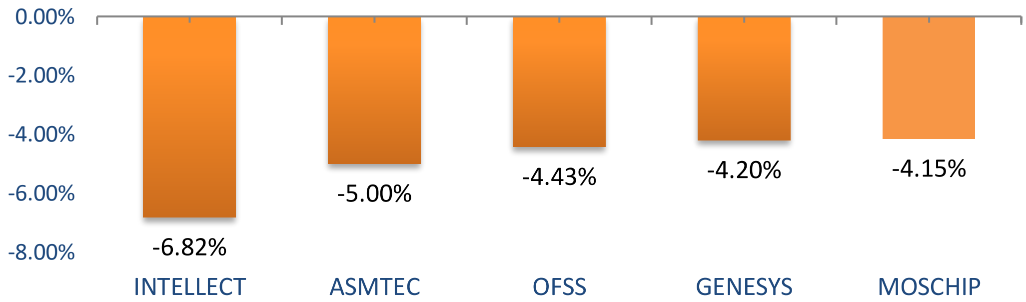
Indian equity benchmarks ended lower for 6th consecutive session on Friday, with both the Nifty and Sensex tumbling near day's low points, primarily driven by heavy selling in IT and pharma stocks, along with continued outflows from foreign institutional investors (FIIs). Markets made a gap down opening and remained under selling pressure throughout the session, as traders were cautious after the Trump administration said it would impose new tariffs on heavy trucks, drugs and kitchen cabinets. Traders took note of Crisil Intelligence in its note has said that US President Donald Trump's move to levy higher fees for granting the H-1B visas will impact Indian IT majors' profit margins by only 0.20%. Sentiments remained downbeat as U.S. President Donald Trump announced a new round of tariffs, and said that the United States will impose a 100 percent tariff on imported branded drugs, 25 percent tariff on imports of all heavy-duty trucks and 50 percent tariff on kitchen cabinets.

On Global front, European markets were trading in green, despite U.S. President Donald Trump's latest tariff threats. Asian markets ended mostly in red amid Singapore's industrial production declined in August on sharp contraction in biomedical manufacturing. Source:AceEquity

NEWS BULLETIN

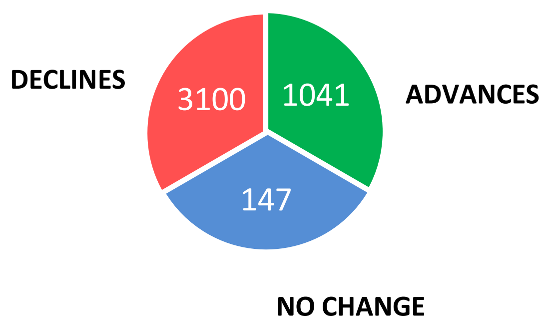
- **Marsons** has received a purchase order worth Rs 20.15 crore (including GST) from Anvil Energy. The order is for the supply of 28 nos. of 33/11 KV, 3ph, 50 Hz, ONAN, 10 MVA, Cu Wound, Outdoor, Conventional type Power Transformer along with accessories. The order is to be executed within 6 months.
- **SoftTech Engineers** has secured a project from Airports Authority of India (AAI) for BIM based Project Monitoring System (BPMS) software application. The total contract value of this project is Rs 17.16 crore. The company shall be deploying its Artificial Intelligence (AI) & Machine Learning (ML) enabled 'Civit INFRA' product to implement a Single Unified Enterprise Solution seamlessly integrated with commercially available BIM software.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 33,327.00
CHANGE: - 822.55
CHANGE: - 2.41%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.63	21.65

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