

END DAY COMMENTARY

22th MAY 2026



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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	75,183.36	75,260.39	75,810.97	75,230.75	75,415.35	+231.99	+0.31
NIFTY	23,654.70	23,671.20	23,835.65	23,671.00	23,719.30	+ 64.60	+0.27

INDICES ENDED THE WEEK ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 231.99 points or 0.31% to settle at 75,415.35 and the Nifty was up by 64.60 points or 0.27% to settle at 23,719.30. The BSE Small Cap 250 was down by 0.26% and BSE 500 was up by 0.21%. On the sectoral front, Consumer Durables, Capital Goods, Banks, Metal and Auto were gaining indices. On the flip side, Oil & Gas, Realty, IT, FMCG and Healthcare were losing indices. Trent, Axis Bank, ICICI Bank, Asian Paints and Hindustan Unilever were gainers on the Sensex; on the flip side, Sun Pharma, ITC, Power Grid, Bharat Electronics and Bharti Airtel were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TRENT	4,303.0	4,170.4	3.18
SHRIRAMFIN	942.00	914.75	2.98
AXISBANK	1,287.0	1,253.3	2.69
ICICIBANK	1,267.2	1,242.8	1.96
WIPRO	202.97	199.74	1.62

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
MAXHEALTH	1,023.0	1,091.1	-6.24
SUNPHARMA	1,840.0	1,891.3	-2.71
ONGC	289.95	295.85	-1.99
ITC	302.05	308.05	-1.95
POWERGRID	294.15	299.55	-1.8

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,56,04,071	769.00	1,967.5
ICICIBANK	1,16,01,085	1,267.2	1,466.7
MAXHEALTH	1,17,11,405	1,023.0	1,205.5
INFY	88,03,066	1,175.0	1,038.1
RELIANCE	71,05,813	1,358.0	964.43

Most Active (by volume)			
Name	Qty	Pr.	Value CR
WIPRO	4,00,14,399	202.97	813.49
ITC	3,07,51,752	302.05	933.78
HDFCBANK	2,56,04,071	769.00	1,967.5
ETERNAL	2,35,37,777	242.80	572.11
TATASTEEL	2,20,23,114	209.35	460.77



Indian equity benchmarks erased some of their initial gains but managed to end higher on Friday, helped by buying in blue-chip bank shares and a rally in global peers. Hopes of progress in the US-Iran peace negotiations also added to markets' optimism. However, gains remained capped as exchange data showed Foreign Institutional Investors (FIIs) emerged as net sellers for the third straight trading day and offloaded their stake worth Rs. 1,891.21 crore on Thursday.

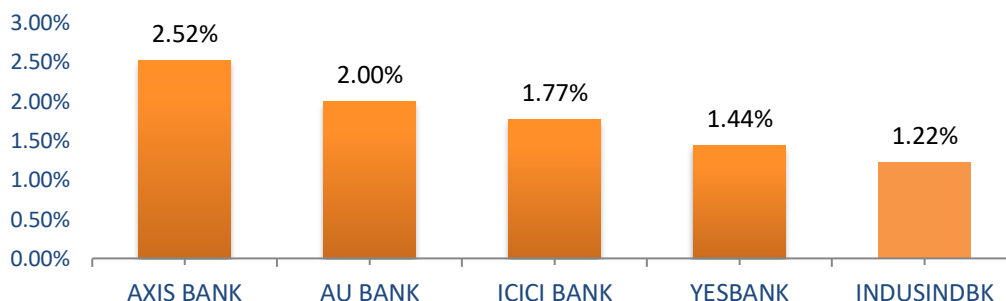
India-US trade deal likely be finalised in coming weeks, months: Expressing confidence over India-US trade deal, which is likely to be finalised in coming weeks or months, US Ambassador Sergio Gor has said that the US is looking forward to sealing the proposed bilateral trade agreement with India.

Global front: European markets were trading in green, while Asian markets settled higher on rising hopes for a diplomatic resolution to the Middle East conflict. With Iran reviewing the latest proposal from the U.S. and Pakistan acting as the mediator, investors were pinning hopes that the three-month war may end soon with a peace deal.
Source: AceEquity

NEWS BULLETIN

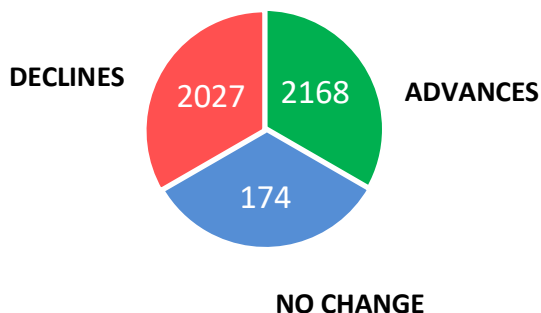
- **Rail Vikas Nigam** has secured Letter of Award (LoA) worth Rs 758.07 crore (including GST at 18%) from NMDC. The LoA is for a project involving development of Railway Siding near Padapur Village along with Bridges, PWD road diversion, associated Civil Works etc.
- **Eicher Motors (EML)** has received approval for an investment of up to Rs 750 crore as cash consideration towards subscription of 50% of the equity share capital of Volvo Financial Services (India) (VFS India).
- **Aurobindo Pharma's** wholly owned step-down subsidiary -- Agile Pharma BV has incorporated a new wholly owned subsidiary in France by the name of Arrow Pharma Production SAS. The object of incorporation of this wholly owned subsidiary is to expand the manufacturing of generic formulations in France.

MARKET DRIVING SECTOR : BANK

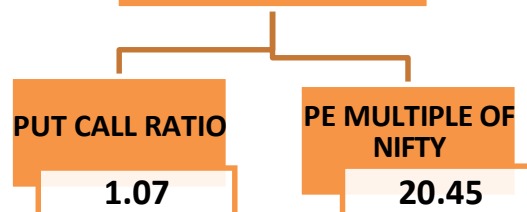


S&P BSE: BANK
CLOSING: 60,904.45
CHANGE: +709.22
CHANGE: +1.18%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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