

END DAY

COMMENTARY

3rd JUNE 2026



Hem Securities
Building your wealth through values

BROKING | INVESTMENT BANKING | RESEARCH | DISTRIBUTION | DEPOSITORY | PMS

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,649.84	74,507.73	74,515.65	73,492.60	74,346.17	-303.67	-0.41
NIFTY	23,483.55	23,415.95	23,459.65	23,151.50	23,405.60	-77.95	-0.33

INDICES RECOVERED FROM LOWER LEVELS

The 30-share BSE Sensex was down by 303.67 points or 0.41% to settle at 74,346.17 and the Nifty was down by 77.95 points or 0.33% to settle at 23,405.60. The BSE Small Cap 250 was up by 0.01% and BSE 500 was down by 0.34%. On the sectoral front, Healthcare, Capital Goods, Auto and Banks were gaining indices. On the flip side, FMCG, Oil & Gas, Metal, Realty, IT, and Consumer Durables were losing indices. SBI Bank, Indigo, ICICI Bank, Trent, and Power Grid were gainers on the Sensex; on the flip side, TCS, Tech Mahindra, HCLTech, Infosys, and ITC 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 red note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
APOLLOHOSP	8,299.0	8,089.5	2.59
TMPV	398.00	390.20	2.00
INDIGO	4,550.1	4,466.1	1.88
MAXHEALTH	965.00	948.70	1.72
SBIN	971.50	956.65	1.55

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TCS	2,245.0	2,446.9	-8.25
TECHM	1,470.0	1,571.4	-6.45
HCLTECH	1,177.5	1,243.5	-5.31
INFY	1,220.5	1,270.8	-3.96
WIPRO	203.90	209.84	-2.83

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
TCS	1,56,60,062	2,245.0	3,551.3
HDFCBANK	3,61,09,480	753.00	2,703.9
SBIN	2,79,47,005	971.50	2,650.9
RELIANCE	2,00,12,293	1,312.6	2,620.8
INFY	1,85,34,303	1,220.5	2,272.1

Most Active (by volume)			
Name	Qty	Pr.	Value CR
WIPRO	6,22,82,204	203.90	1,276.2
HDFCBANK	3,61,09,480	753.00	2,703.9
ITC	2,80,01,438	276.75	775.75
SBIN	2,79,47,005	971.50	2,650.9
ETERNAL	2,51,92,315	246.65	622.63



Indian equity benchmarks recovered most of their intraday losses in volatile trading but ended lower on Wednesday dragged by heavy selling in IT stocks, a fresh spike in crude oil prices and persistent foreign fund outflows. Markets were also cautious ahead of the RBI's Monetary Policy Committee decision on Friday.

India may get limited benefits from US tariffs reduction on industrial, agricultural equipment: Think tank Global Trade Research Initiative (GTRI) has said that India may get limited benefits from US tariffs reduction on selected industrial and agricultural equipment containing steel, aluminium or copper from 25% to 15%.

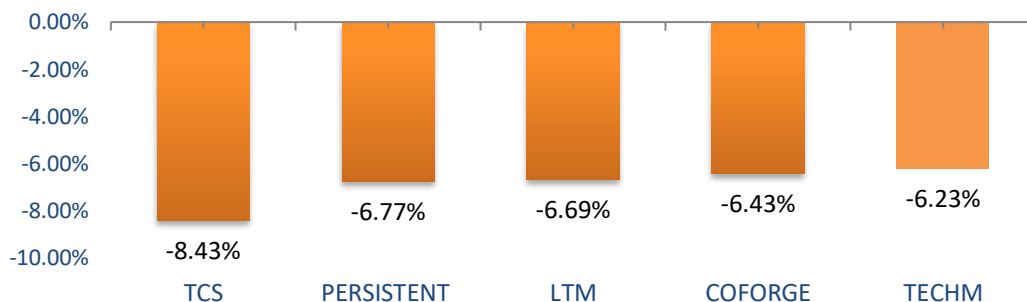
Global front: European markets were trading lower as renewed Middle East tensions continued to push oil prices higher, clouding the outlook for inflation and interest rates. Asian markets ended mostly higher as renewed enthusiasm for artificial intelligence offset uncertainty over U.S.-Iran negotiations aimed at ending the war and reopening the Strait of Hormuz.

Source: AceEquity

NEWS BULLETIN

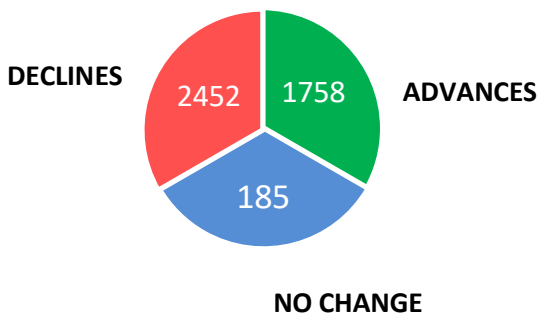
- **Tech Mahindra** has launched Agentic Development & Modernization Services, a next-generation services portfolio designed to empower enterprises modernize how applications are built, evolved, and operated.
- **Epack Prefab Technologies** has secured purchase order worth around Rs 165 crore (excluding taxes). The order pertains to design, fabrication, manufacturing and supply of Cells and Module include erection. The order is to be executed within around 4 months.
- **Granules India's wholly-owned subsidiary -- Granules Pharmaceuticals, Inc. (GPI)** located in Chantilly, Virginia, US has received the Establishment Inspection Report (EIR) from the US Food and Drug Administration (USFDA), with a Voluntary Action Indicated (VAI) classification.

MARKET DRIVING SECTOR : IT

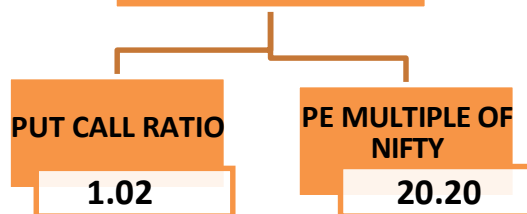


S&P BSE: IT
CLOSING: 28,597.34
CHANGE: -1,509.59
CHANGE: -5.01%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



[For Disclosure & Disclaimer, click here](#)