END DAY COMMENTARY

17th JUNE 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,808.48	77,080.09	77,218.99	76,768.49	77,155.62	+347.14	+0.45
NIFTY	23,989.15	24,044.50	24,108.20	23,969.70	24,085.70	+96.55	+0.40

INDICES ENDED THE DAY ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 347.14 points or 0.45% to settle at 77,155.62 and the Nifty was up by 96.55 points or 0.40% to settle at 24,085.70. The BSE Small Cap 250 was up by 0.58% and BSE 500 was up by 0.52%. On the sectoral front, IT, Bank, Consumer Durables, Oil &Gas, Capital Goods and Healthcare were gaining indices. On the flip side, FMCG, Auto and Realty were losing indices. Trent, Bharat Electronics, Eternal, Tata Steel and Infosys were gainers on the Sensex; on the flip side, Bajaj Finserv, Axis Bank, Kotak Bank, Mahindra and Mahindra and Maruti 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.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TRENT	3,108.0	2,897.8	7.25
BEL	422.00	407.55	3.55
HINDALCO	1,008.9	982.40	2.70
SBILIFE	1,801.9	1,767.6	1.94
ETERNAL	257.85	253.60	1.68

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TMPV	361.70	393.60	-8.10
CIPLA	1,350.2	1,373.2	-1.67
BAJAJFINSV	1,765.0	1,787.3	-1.25
ONGC	245.45	248.20	-1.11
AXISBANK	1,351.9	1,365.7	-1.01

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	3,24,05,604	787.00	2,554.8
TMPV	5,19,87,488	361.70	1,906.0
TRENT	56,45,225	3,108.0	1,715.0
BHARTIARTL	76,53,632	1,874.2	1,426.4
RELIANCE	1,00,29,170	1,332.1	1,332.8

Most Active (by volume)

Name	Qty	Pr.	Value CR
TMPV	5,19,87,488	361.70	1,906.0
ETERNAL	3,31,96,297	257.85	860.91
HDFCBANK	3,24,05,604	787.00	2,554.8
BEL	2,45,06,595	422.00	1,015.4
TATASTEEL	2,24,91,220	198.83	445.39

Indian equity benchmarks settled higher on Wednesday, extending their winning streak to a fourth straight session, ahead of the U.S. Federal Reserve's policy decision. Markets traded higher on value buying in index heavyweights and ended firmly in positive territory despite some intraday profit-booking. Sentiments were supported by lower crude oil prices, with Brent hovering near $79 per barrel, and a stronger rupee driven by increased dollar selling by exporters and banks.

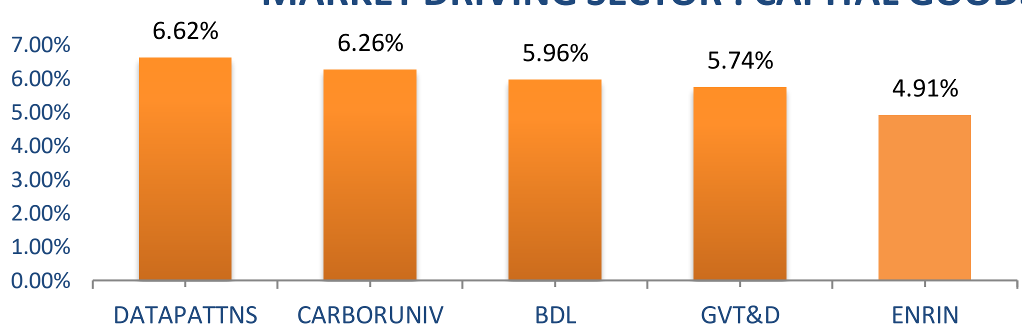
India, Canada aim to finalise free trade agreement by end of 2026: Traders took encouragement as India and Canada have agreed to conclude negotiations for a free trade agreement by the year-end as Prime Minister Narendra Modi held wide-ranging talks with his Canadian counterpart Mark Carney on boosting ties in areas of defence, trade and energy.

On global front: Asian markets ended mostly higher on easing concerns over the Middle East conflict and sustained buying in AI-related shares ahead of the U.S. Federal Reserve's policy decision. European markets were trading mostly in green despite reports that Eurozone consumer price inflation held at 3.2% in May 2026, the highest since September 2023. Source: AceEquity

NEWS BULLETIN

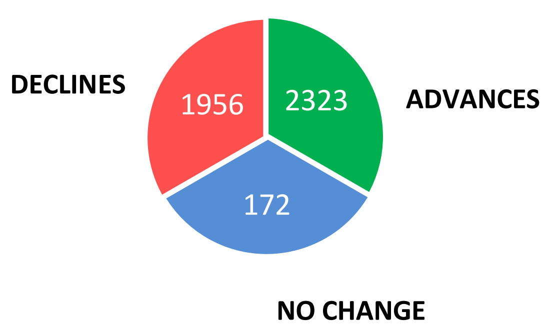
- **HCL Technologies** has entered into a multi-year strategic partnership with e.solutions, a Germany based automotive software specialist and part of Volkswagen Group, for the development of next-generation software-defined infotainment and connectivity solutions
- **NBCC (India**) has successfully sold commercial built-up space of around 7.08 lakh sq. ft area at Bharat Business Park, Sarojini Nagar, New Delhi through an e-auction at total sale value of around Rs 2,857 crore. The company will receive 1% of the sale value as a marketing fee.
- **Power Grid Corporation** of India has been declared as successful bidder under Tariff Based Competitive Bidding to establish Inter-State Transmission System for the project namely 'WR-ER Inter-Regional Network Expansion Scheme Part-A' on Build, Own**,** Operate and Transfer (BOOT) basis

MARKET DRIVING SECTOR : CAPITAL GOODS



S&P BSE: CAPITAL GOODS
CLOSING: 82,328.59
CHANGE: +2207.38
CHANGE: +2.76%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.10	20.77

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