END DAY COMMENTARY

18th JUN 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,155.62	77,131.66	77,492.33	76,953.00	77,409.98	+254.36	+0.33
NIFTY	24,085.70	24,073.80	24,189.25	24,036.95	24,168.00	+82.30	+0.34

INDICES CLOSED POSITIVE FOR THE 5TH CONSECUTIVE DAY

The 30-share BSE Sensex was up by 254.36 points or 0.33% to settle at 77,409.98 and the Nifty was up by 82.30 points or 0.34% to settle at 24,168. The BSE Small Cap 250 was up by 0.67% and BSE 500 was up by 0.44%. On the sectoral front, Realty, FMCG, Healthcare, Auto, Metal, Consumer Durables, Oil & Gas, Capital Goods and Banks were gaining indices. On the flip side, IT was losing index. Indigo, TRENT, BEL, NTPC and SBIN were gainers on the Sensex; on the flip side, Infosys, Tech Mahindra, Maruti, TCS and HCL Tech 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.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
MAXHEALTH	1,092.45	1,026.15	6.46
INDIGO	5,014.00	4,878.40	2.78
ADANIENT	3,032.00	2,951.90	2.71
TRENT	3,182.00	3,102.80	2.55
BEL	428.10	419.85	1.96

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,127.40	1,157.70	-2.62
TATACONSUM	1,111.00	1,124.50	-1.20
TECHM	1,447.80	1,462.40	-1.00
TCS	2,202.50	2,223.00	-0.92
MARUTI	13,505.0	13,630.0	-0.92

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	4,14,92,071	800.80	3,307.79
RELIANCE	1,54,94,549	1,331.00	2,057.29
INFY	1,67,81,447	1,127.40	1,896.87
ICICIBANK	1,34,67,985	1,341.50	1,805.80
TRENT	36,95,494	3,182.00	1,168.76

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	4,14,92,071	800.80	3,307.7
BEL	2,35,98,062	428.10	1,005.8
TMPV	2,26,56,468	364.55	822.57
TATASTEEL	2,21,11,931	200.50	441.42
WIPRO	1,81,65,845	182.95	332.09

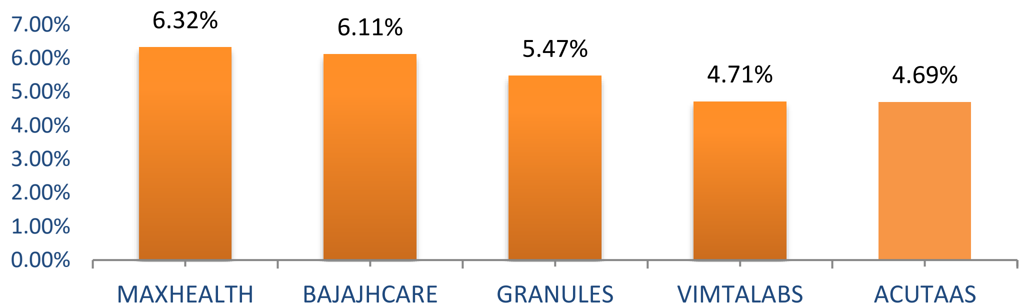
Indian equity benchmarks ended higher on Thursday, supported by optimism over the India-UK Free Trade Agreement, which is set to formally come into force on July 15, 2026. After making negative start, soon indices traded in a narrow range and remained volatile for most part of the session, weighed down by heavy selling in IT stocks. Market participants remained cautious after the Federal Reserve indicated the possibility of a rate hike later this year. However, strong buying interest in the final hour of trade helped the benchmarks to rebound sharply and close near the day's highs. Traders took support with the report stated that India and the UK have announced that the free trade agreement will come into force on July 15, a move which is expected to help double two-way commerce to $100 billion by 2030. Some support also came as the Reserve Bank of India (RBI) infused Rs 72,300 crore transient liquidity through two Variable Rate Repo (VRR) auction into the banking system after surplus liquidity narrowed following advance tax payments.

On the global front, European markets were trading mostly in green after the U.S. Federal Reserve left interest rates unchanged. Asian markets closed mostly in green after reports that the US-Iran peace agreement had been finalized and digitally signed by US President Donald Trump and Iranian President Masoud Pezeshkian.
Source: AceEquity

NEWS BULLETIN

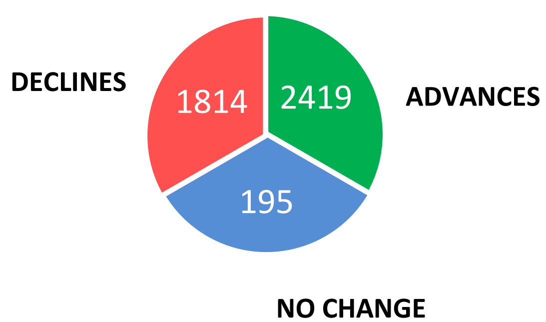
- **JBM Auto's electric vehicle arm -- JBM ECOLIFE Mobility (P) (JBM Ecolife)** has successfully secured a Rs 750 crore long term strategic investment from Motilal Oswal Alternates (MO Alternates), the alternative investment arm of Motilal Oswal Group. This is the largest ever investment by any Indian investor till date in electric mobility.
- **Siyaram Recycling Industries** has secured a noteworthy order from Anurag Impex for Brass Scrap Honey. The total order is worth Rs 3.20 crore. The order is to be executed within 7 days. Earlier, the company had secured a noteworthy order from Green Metals FZCO for Brass Billets worth $426,000.
- **Suyog Telematics** has received approximately 636 telecom site orders in multiple tranches from Vodafone Idea in the ordinary course of business.

MARKET DRIVING SECTOR : HEALTHCARE



S&P BSE: HEALTHCARE
CLOSING: 47,484.67
CHANGE: + 431.34
CHANGE: + 0.92%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.11	20.84

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