WEEKLY COMMENTARY

20 JUN 2026

Hem Securities
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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	75,527.95	76,725.27	77,492.33	76,140.44	76,802.90	1,274.95	+1.69
NIFTY 50	23,622.90	23,984.85	24,189.25	23,817.80	24,013.10	390.20	+1.65

INDICES ENDED THE WEEK WITH STRONG GAINS

Indian equity benchmark ended on a green note in the week ended 20 Jun, 2026. Key indices were positive in four out of five sessions of the week. The S&P BSE Sensex was up by 1,274.95 points or 1.69% to settle at 76,802.90 in the week ended 20 Jun, 2026. The CNX Nifty was up by 390.20 points or 1.65% to settle at 24,013.10. The BSE 500 index was up by 832.04 or 2.35% to settle at 36,174.54. The BSE Small-Cap index was up by 249.00 points or 3.66% to settle at 7,047.01

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TRENT LTD	3205.8	2755.3	16.35
ETERNAL LTD	264.30	243.80	8.41
HDFC LIFE INSUR	591.85	555.35	6.57
TITAN COMPANY	4419.9	4184.0	5.64
SBI LIFE	1800.2	1706.0	5.52

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TMPV	359.50	390.00	-7.82
INFOSYS LTD	1051.4	1116.4	-5.82
CIPLA LTD	1351.8	1389.4	-2.71
TCS LTD	2125.0	2161.3	-1.68
TECH MAHINDRA	1409.6	1429.2	-1.37

Most Active (by value)

Name	Avg Value	Pr.	Qty
HDFC BANK	13686.0	779.80	175507.74
RELIANCE IND	11465.6	1309.5	87557.30
INFOSYS LTD	9121.3	1051.4	86754.29
ICICI BANK	8051.2	1346.5	59793.81
BHARTI AIRTEL	7471.2	1910.8	39100.02

Most Active (by volume)

Name	Avg Value	Pr.	Qty
HDFC BANK	13686.0	779.80	175507.74
ETERNAL LTD	3691.3	264.30	139666.05
TATA STEEL	2636.2	198.96	132501.33
TMPV	3742.5	359.50	104102.81
WIPRO LTD	1759.9	180.80	97343.50

INSTITUTIONAL NET POSITION

FIIs Cash	+3,386.33
FIIs Index Future	+2,575.88
FIIs Stock Future	-7,189.35
DIIs Cash	+7,107.89

On Monday, 15 Jun, 2026, the key equity indices ended with significant gains. The S&P BSE Sensex soared 736.38 points or 0.97% to 76,264.33. On Tuesday, 16 Jun, 2026, the benchmark indices extended gains. The S&P BSE Sensex jumped 544.15 points or 0.71% to 76,808.48. On Wednesday, 17 Jun, 2026, the key equity indices shut the day with moderate gains. The S&P BSE Sensex advanced 347.14 points or 0.45% to 77,155.62. On Thursday, 18 Jun, 2026, the benchmark indices extended their gains for fourth consecutive session. The S&P BSE Sensex advanced 254.36 points or 0.33% to 77,409.98. On Friday, 19 Jun, 2026, The key domestic indices ended on a lower note. The S&P BSE Sensex tumbled 607.08 points or 0.78% to 76,802.90.

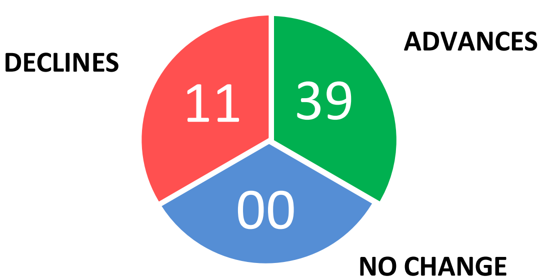
MARKET WATCH- LAST WEEK

Benchmark indices ended the week with strong gains, extending their winning streak to a fifth consecutive session, supported by broad-based buying, robust export growth, optimism surrounding the G7 Summit and the Modi–Trump meeting, while expectations of improved monsoon rainfall helped offset concerns over higher wholesale inflation and delayed monsoon onset.

MARKET WATCH- COMING WEEK

Indian equities are likely to trade with a positive bias but remain volatile, supported by the sharp decline in crude oil prices following the US-Iran ceasefire and reopening of the Strait of Hormuz. Investors will closely monitor India's infrastructure output, HSBC PMI data and forex reserves for signs of domestic economic resilience, while global cues from US PMI, GDP data and China's Loan Prime Rate and FDI figures will shape sentiment.

NIFTY MARKET BREADTH (W) - POSITIVE



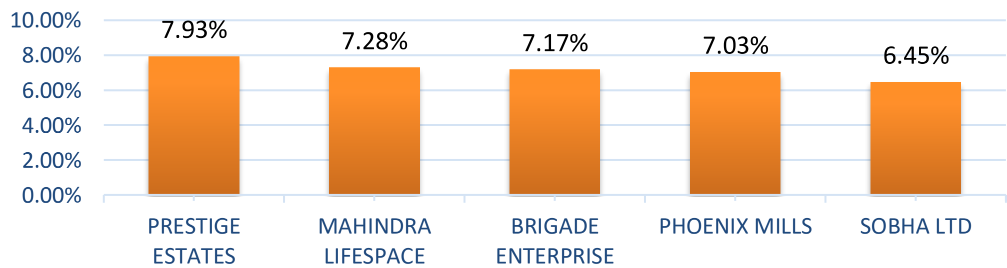
RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.91	20.71

NEWS BULLETIN

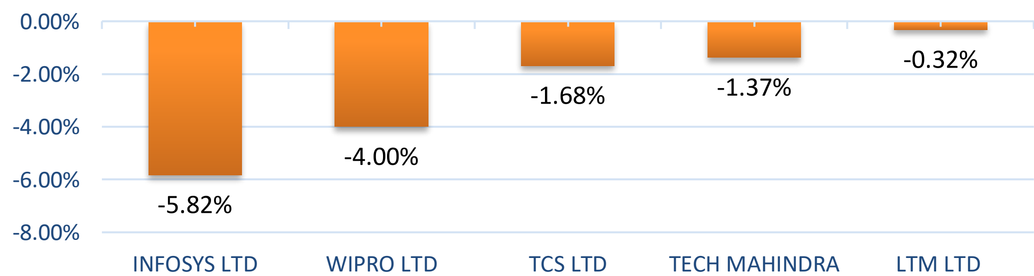
- **Texmaco Rail & Engineering** has secured Letter of Intent (LoI) worth Rs 253.28 crore (including taxes) from JSW (South) Rail Logistics. The LoI is for manufacture and supply of BFNSM1 Rakes along with BVCM Wagons. The order is to be executed within 13.5 months from the effective or date of commencement of works..
- **Bharat Forge** has signed a Rs 425 crore contract with the Ministry of Defence (MoD), India, for the supply of Gas Turbine Generators (GTGs) to Indian Navy (IN) for onboard power generation on Kolkata class ships. The contract will be executed over a period of 5 years.
- **Zaggle Prepaid Ocean Services (Zaggle)** announced that it has entered into an agreement with Punjab National Bank (PNB) to act as a co-branding partner for a retail credit card product.
- **GE Power India** announced a series of senior leadership changes, including the appointment of Rahul Rojal as Chief Financial Officer (CFO), as the company strengthens its management team amid ongoing business and project execution initiatives.

MARKET DRIVING SECTOR : REALTY



NIFTY REALTY
CLOSING: 811.90
CHANGE: +42.30
CHANGE: +5.50%

MARKET DRIVING SECTOR : IT



NIFTY IT
CLOSING: 27,426.85
CHANGE: -368.90
CHANGE: -1.33%

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