END DAY COMMENTARY

22nd JUN 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,802.90	77,160.67	77,325.56	77,008.02	77,094.07	+291.17	+0.38
NIFTY	24,013.10	24,106.60	24,168.05	24,073.15	24,102.90	+89.80	+0.37

INDICES SHUT THE DAY IN POSITIVE NOTE

The 30-share BSE Sensex was up by 291.17 points or 0.38% to settle at 77,094.07 and the Nifty was up by 89.80 points or 0.37% to settle at 24,102.90. The BSE Small Cap 250 was up by 0.76% and BSE 500 was up by 0.46%. On the sectoral front, Realty, IT, Healthcare, Auto, Metal, Oil & Gas, Capital Goods and Banks were gaining indices. On the flip side, FMCG and Consumer Durables was losing indices. Tech Mahindra, Sunpharma, Reliance, Infosys and BEL were gainers on the Sensex; on the flip side, Asian Paint, Titan, Powergrid, Trent and ITC 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 negative note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
CIPLA	1,417.00	1,351.80	4.82
TECHM	1,440.00	1,409.60	2.16
DRREDDY	1,292.00	1,272.10	1.56
BAJAJ-AUTO	10,214.0	10,066.0	1.47
SUNPHARMA	1,864.00	1,838.30	1.40

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ASIANPAINT	2,672.90	2,732.90	-2.20
TITAN	4,367.00	4,419.90	-1.20
NESTLEIND	1,400.00	1,414.80	-1.05
SHRIRAMFIN	992.00	1,001.90	-0.99
TRENT	3,176.00	3,205.80	-0.93

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,51,94,765	785.60	1,982.07
RELIANCE	1,29,31,213	1,324.7	1,724.35
INFY	1,01,78,505	1,065.0	1,086.91
TCS	45,66,101	2,129.5	975.22
BAJAJ-AUTO	8,34,191	10,214	849.31

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	2,51,94,765	785.60	1,982.0
TATASTEEL	1,92,38,506	198.80	383.58
ETERNAL	1,87,97,609	263.00	498.49
TMPV	1,54,47,905	361.10	564.62
RELIANCE	1,29,31,213	1,324.7	1,724.3

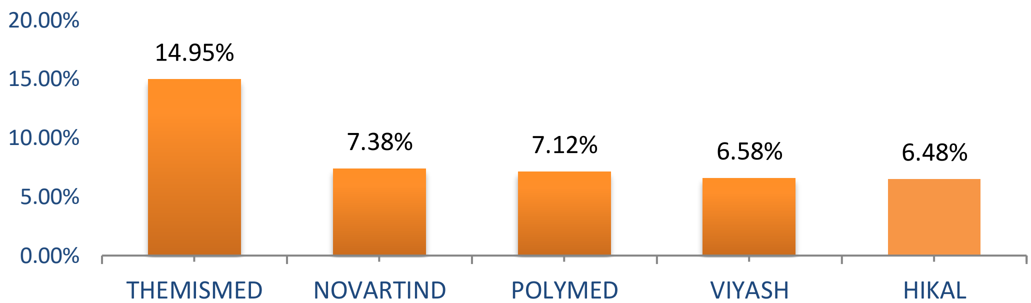
Indian equity benchmarks ended higher on Monday, amid fresh foreign fund inflows. Foreign Institutional Investors (FIIs) bought equities worth Rs 4,859.07 crore on Friday. Markets made a positive start and remained higher within a narrow range throughout the session, supported by gains in IT and oil & gas stocks. Sentiments remained upbeat following reports that US-Iran talks had advanced toward a final deal that could be reached within 60 days. Sentiments remained upbeat as Union Minister of State for Personnel Jitendra Singh said India and South Korea have held discussions on strengthening cooperation between the two countries in areas such as digital governance, e-government services, public administration, capacity development, and citizen-centric service delivery. Traders took some support with Commerce and Industry Minister Piyush Goyal has stating that India and the 27-member European Union (EU) are likely to sign a Free Trade Agreement (FTA) by December 2026, with implementation likely between February and March 2027.

On the global front, European markets were trading in the red amid uncertainty over whether the U.S. and Iran would secure a lasting peace agreement in the Middle East. Asian markets closed mostly higher despite broadly negative cues from European markets. Source: AceEquity

NEWS BULLETIN

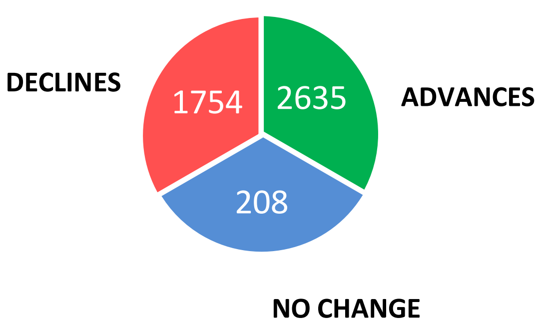
- **Flair Writing Industries** has secured fresh orders worth Rs 20 crore from large format stores in its Creative and Steel Bottles & Houseware division. These orders are to be executed in the next 90 days and are expected to support margin-accretive growth.
- **Asian Energy Services** has secured a Rs 187.62 crore EPC contract (including GST) from GSECL for enhancement of a coal handling plant in Ukai Gujarat. The project marks a strategic milestone for the company as its first major order outside Coal India and its subsidiaries and associates.
- **Knowledge Marine & Engineering Works** has secured a work order worth Rs 66.11 crore from IWAI, Ministry of Ports, Shipping and Waterways, Government of India. The company has secured the order in consortium with its subsidiary -- Knowledge Shipyard.

MARKET DRIVING SECTOR : HEALTHCARE



S&P BSE: HEALTHCARE
CLOSING: 48,230.05
CHANGE: + 385.19
CHANGE: + 0.81%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.98	20.79

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