END DAY COMMENTARY

23rd JUNE 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,094.07	77,086.05	77,194.83	76,082.51	76,200.68	-893.39	-1.16
NIFTY	24,102.90	24,071.30	24,135.50	23,784.95	23,824.10	-278.80	-1.16

INDICES CLOSED IN RED AMID WEAK GLOBAL CUES

The 30-share BSE Sensex was down by 893.39 points or 1.16% to settle at 76,200.68 and the Nifty was down by 278.80 points or 1.16% to settle at 23,824.10. The BSE Small Cap 250 was down by 0.62% and BSE 500 was down by 1.05%. On the sectoral front, Healthcare was gaining index. On the flip side, Realty, IT, FMCG, Auto, Metal, Oil & Gas, Capital Goods, Banks and Consumer Durables were losing indices. Powergrid, Axis Bank, Sunpharma and Maruti were gainers on the Sensex; on the flip side, Infosys, TCS, BEL, Tata Steel and Adani Ports were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a negative note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
CIPLA	1,435.0	1,415.7	1.36
POWERGRID	292.50	289.75	0.95
DRREDDY	1,300.9	1,290.7	0.79
ASIANPAINT	2,662.0	2,674.0	0.41
SUNPHARMA	1,867.0	1,862.9	0.22

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,029.0	1,065.4	-3.42
WIPRO	174.39	180.18	-3.21
TCS	2,060.0	2,127.8	-3.19
ADANIENT	2,964.6	3,059.6	-3.10
JSWSTEEL	1,242.7	1,282.4	-3.10

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	2,82,89,062	772.60	2,212.01
RELIANCE	1,54,00,184	1,306.0	2,030.04
INFY	1,93,23,064	1,029.0	1,999.40
ICICIBANK	1,18,84,879	1,335.5	1,607.91
TCS	63,92,736	2,060.0	1,325.48

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	3,46,34,510	193.10	673.43
HDFCBANK	2,82,89,062	772.60	2,212
WIPRO	2,39,54,730	174.39	421.91
INFY	1,93,23,064	1,029.0	1,999.4
ETERNAL	1,66,43,592	258.90	435.90

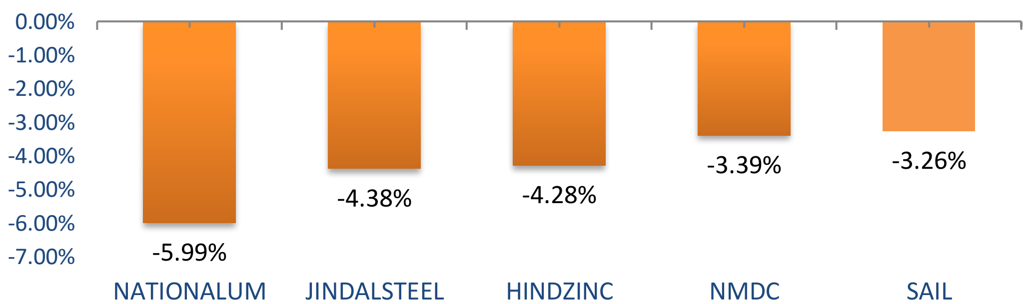
A wave of heavy selling engulfed Indian equity markets on Tuesday, driving Sensex and Nifty down by more than 1% each. After a negative start, markets remained flat during the first half of the session, but witnessed a sharp fall in the second half and finally ended near day's low points. Traders got concerned after the Ministry of Commerce & Industry in its data has showed that eight key infrastructure sectors' output growth slowed to a seven-month low of 0.5 per cent in May 2026 due to a fall in output of coal, crude oil and refinery products. Adding more worries, growth of India's private sector softened in the month of June, with slower demand for Indian goods and services, restricting the extent to which output levels were raised. The HSBC Flash India PMI Composite Output Index fell down to 57.4 in June from a final reading of 59.3 in May. Some anxiety came with newly appointed CII President R Mukundan's statement that Chinese investments and technology are welcome in India, but the country should adopt a careful and measured approach towards opening trade with Beijing.

On the global front, European markets were trading lower, while Asian markets ended mostly in red, amid continued uncertainty about the progress in the ongoing peace talks to end the Middle East war and the related complete opening of the Strait of Hormuz. Source: AceEquity

NEWS BULLETIN

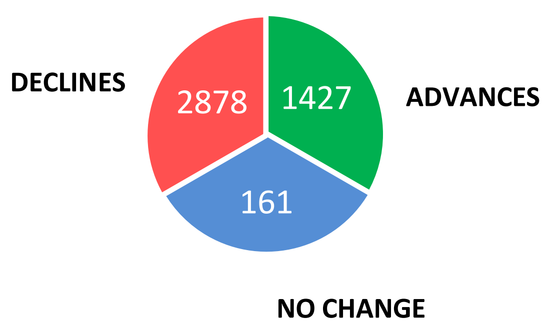
- **Avenue Supermarts** has opened a new store at Gift City, Gandhinagar (Gujarat), on June 21, 2026. The total number of stores as on date stands at 501. Earlier, the company had opened 12 new stores across India on March 31, 2026.
- **We Win** has secured work order worth around Rs 8.70 crore for selection of Implementation Agency for enhancing capabilities of Existing Accident Response System and Traffic Management Centre under MPRDC.
- **Railtel Corporation of India** has secured purchase order worth around Rs 334.51 crore from Ministry of Railways. The order is for up-gradation of e-Office instances of Zonal Railways/Administrative Units (AUs) to version 7.x and mandatory use of DSCs/eSign in e-Office System. The order is to be executed by June 22, 2031.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 40,812.31
CHANGE: - 1,262.61
CHANGE: - 3.00%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.73	20.52

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