END DAY COMMENTARY

24th JUNE 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,200.68	76,229.76	77,190.37	76,121.59	76,991.22	+790.54	+1.04
NIFTY	23,824.10	23,795.80	24,090.05	23,789.25	24,021.65	+197.55	+0.83

BOURSES RECOVERED FROM LOWER LEVELS

The 30-share BSE Sensex was up by 790.54 points or 1.04% to settle at 76,991.22 and the Nifty was up by 197.55 points or 0.83% to settle at 24,021.65. The BSE Small Cap 250 was up by 0.20% and BSE 500 was up by 0.53%. On the sectoral front, Realty, IT, FMCG, Oil & Gas, Banks, Consumer Durables and Healthcare were gaining indices. On the flip side, Auto, Metal and Capital Goods were losing indices. Indigo, Trent, Tech Mahindra, Bajaj Finance and ICICI Bank were gainers on the Sensex; on the flip side, NTPC, Tata Steel, Maruti, BEL and Bharti Airtel 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
INDIGO	5,198.0	4,961.4	4.77
TRENT	3,256.0	3,142.9	3.60
ADANIENT	3,068.0	2,962.9	3.55
TECHM	1,461.0	1,415.6	3.21
BAJFINANCE	990.00	962.40	2.87

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ-AUTO	9,755.0	10,025	-2.69
NTPC	356.65	364.60	-2.18
MARUTI	13,209	13,451	-1.80
TATASTEEL	190.15	193.56	-1.76
ONGC	240.10	244.35	-1.74

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	3,47,01,292	792.80	2,736.51
ICICIBANK	1,64,40,708	1,373.0	2,252.33
BHARTIARTL	89,57,457	1,874.8	1,686.98
RELIANCE	1,10,30,917	1,313.4	1,447.51
INFY	1,23,46,266	1,056.0	1,297.15

Most Active (by volume)

Name	Qty	Pr.	Value CR
WIPRO	5,66,27,728	174.66	983.85
TATASTEEL	5,13,05,789	190.15	979.32
HDFCBANK	3,47,01,292	792.80	2,736.5
ETERNAL	2,50,71,320	256.90	644.33
ICICIBANK	1,64,40,708	1,373	2,252.3

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A sharp rebound witnessed in Indian equity markets on Wednesday after yesterday's lackluster session, with both Sensex and Nifty ending with strong gains, amid easing geopolitical tensions and growing optimism around a potential U.S.-India bilateral trade agreement. After a cautious start, markets gained traction and traded firm throughout the session. Investors' sentiment bolstered after Reserve Bank of India (RBI) Governor Sanjay Malhotra said it was premature to discuss interest rate hikes, noting that the central bank was monitoring the impact of higher crude oil prices on inflation before taking a view on the policy path. Some support came after India and the United States have held high-level trade talks aimed at salvaging and recalibrating a proposed bilateral trade agreement after changes in US tariff policy disrupted a framework negotiated earlier this year. Traders took a note of reports that S&P Global Ratings has lowered India's Gross Domestic Product (GDP) growth projection to 6.6 per cent for the current fiscal year ending March 2027 (FY27).

On the global front, European markets were trading mixed and Asian markets ended mixed, due to skepticism over spending in AI infrastructure and mixed signals from talks between Washinton and Tehran on ending their conflict.
Source: AceEquity

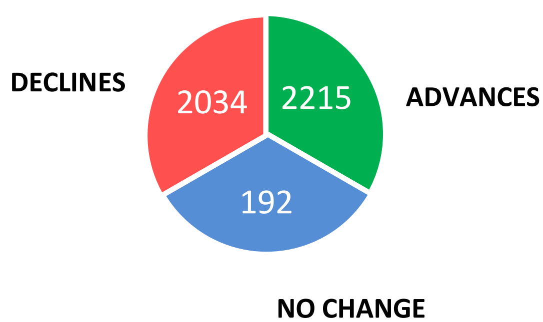
NEWS BULLETIN

- **Solarium Green Energy** has secured a Letter of Award (LOA) worth around Rs 186.53 crore (exclusive of GST), as a sub-contractor. The LOA is for execution of end-to-end engineering, procurement and construction (EPC) works as a sub-contractor for a 50 MW AC/65 MW DC Solar PV Power Project on a turnkey basis, including operation and maintenance (O&M) services for a period of 3 years.
- **Admach Systems** has received a purchase order (PO) worth Rs 5.02 crore (including GST) from a domestic customer in the steel industry. The order is for the supply of the two-roll straightening machine. The order is to be completed within 9 months from the date of PO or advance payment whichever is later.

MARKET DRIVING SECTOR : REALTY

S&P BSE: REALTY
CLOSING: 6,428.44
CHANGE: + 136.44
CHANGE: + 2.17%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.20	20.72

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