END DAY COMMENTARY

25th JUNE 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,991.22	77,391.07	77,803.18	76,993.16	77,100.47	+109.25	+0.14
NIFTY	24,021.65	24,125.85	24,261.60	24,039.00	24,056.00	+34.35	+0.14

INDICES SHUT THE WEEK ON A FLAT NOTE

The 30-share BSE Sensex was up by 109.25 points or 0.14% to settle at 77,100.47 and the Nifty was up by 34.35 points or 0.14% to settle at 24,056.00. The BSE Small Cap 250 was down by 0.51% and BSE 500 was down by 0.05%. On the sectoral front, Auto, Realty, FMCG and Banks were gaining indices. On the flip side, IT, Oil & Gas, Consumer Durables, Metal, Healthcare and Capital Goods were losing indices. Indigo, Mahindra & Mahindra, Maruti, SBIN and ICICI Bank were gainers on the Sensex; on the flip side, Powergrid, BEL, Tech Mahindra, Infosys 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	5,462.0	5,207.2	4.89
M&M	3,185.3	3,064.5	3.94
MARUTI	13,753	13,248	3.81
MAXHEALTH	1,122.9	1,081.7	3.81
TATACONSUM	1,131.5	1,098.1	3.04

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
ONGC	233.15	240.00	-2.85
HINDALCO	952.00	976.60	-2.52
POWERGRID	284.50	290.90	-2.20
TECHM	1,439.7	1,461.6	-1.50
BHARTIARTL	1,849.9	1,877.3	-1.46

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	4,67,07,966	796.00	3,733.6
INDIGO	51,45,228	5,462.0	2,785.8
ICICIBANK	1,71,73,209	1,387.0	2,388.1
M&M	53,46,892	3,185.3	1,697.1
SBIN	1,60,02,360	1,045.2	1,678.4

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	4,67,07,966	796.00	3,733.6
ONGC	3,60,85,563	233.15	849.17
TATASTEEL	3,41,51,735	188.60	644.55
BEL	2,19,94,027	408.50	901.95
WIPRO	2,15,44,904	175.09	376.28

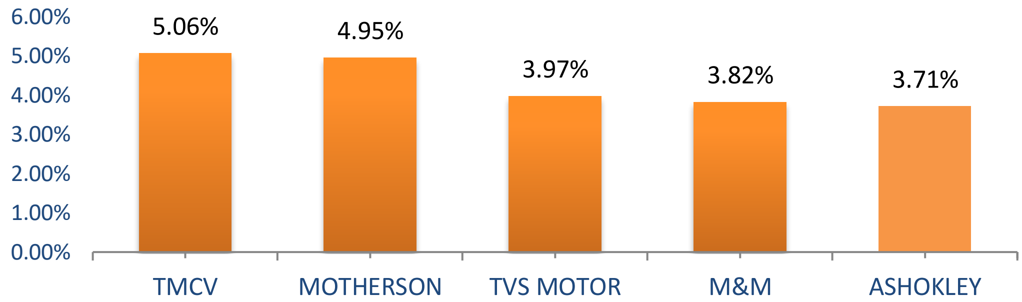
Indian equity benchmarks ended higher on the last trading session of the week, as oil prices dropped to levels last seen before the war in the Middle East on easing geopolitical tensions. After a strong start, markets maintained gaining rally for the most part of the session but at the end, some correction witnessed. Traders got comfort, after India and the United States (US) reviewed the progress on an interim bilateral trade agreement during the two-day ministerial meeting. The street took a note of reports that the Reserve Bank of India (RBI) has revised the computation of capital charge for foreign exchange risk of banks in line with international standards. Sentiments were upbeat, as Commerce and Industry Minister Piyush Goyal has met exporters and industry representatives to discuss ways to boost outbound shipments and fully utilise the benefits of free trade agreements (FTAs).

On the global front, European markets were trading higher, while Asian markets also ended higher, with technology stocks rallying in South Korea and Japan as robust earnings from Micron and Qualcomm helped ease concerns over AI demand, elevated valuations and the sustainability of the artificial-intelligence trade that has pushed global stocks to record highs.
Source: AceEquity

NEWS BULLETIN

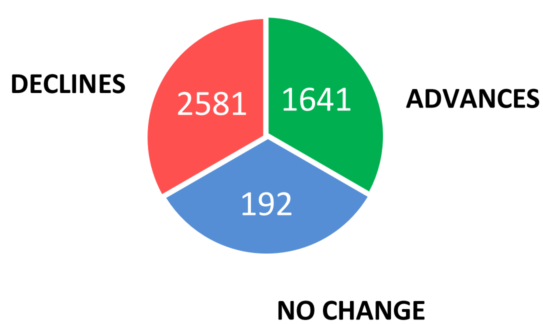
- **Jupiter Wagons** has secured two significant orders aggregating to around Rs 264.32 crore from JSW (South) Rail Logistics and Central Warehousing Corporation (CWC), reinforcing its position as a trusted partner in India's evolving freight logistics sector while strengthening its presence across both private and public sector customers.
- **Duncan Engineering** has received order worth around Rs 5.54 crore (excluding GST) from Bharat Petroleum Corporation, a Government of India undertaking, on June 24, 2026.
- **Railtel Corporation of India** has secured a LoA worth around Rs 29.84 crore (including tax) from Southern Power Distribution Company of A P. The order is for supply, installation, testing, configuration and training of Software. The order is to be executed by June 23, 2031.

MARKET DRIVING SECTOR : AUTO



S&P BSE: AUTO
CLOSING: 59,666.96
CHANGE: + 1337.43
CHANGE: + 2.29%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.06	20.75

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