END DAY COMMENTARY

29th JUNE 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,100.47	77,055.21	77,252.78	76,621.75	76,728.37	-372.10	-0.48
NIFTY	24,056.00	24,061.75	24,120.00	23,924.55	23,946.25	-109.75	-0.46

INDICES CLOSED THE DAY WITH MODERATE LOSSES

The 30-share BSE Sensex was down by 372.10 points or 0.48% to settle at 76,728.37 and the Nifty was down by 109.75 points or 0.46% to settle at 23,946.25. The BSE Small Cap 250 was down by 0.57% and BSE 500 was down by 0.48%. On the sectoral front, Metal, Capital Goods and Healthcare were gaining indices. On the flip side, Auto, IT, Oil & Gas, Consumer Durables, Banks, Realty and FMCG were losing indices. Eternal, Trent, BEL, NTPC and Powergrid were gainers on the Sensex; on the flip side, Kotak Bank, Mahindra & Mahindra, Maruti, Indigo and Axis Bank 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
MAXHEALTH	1,150.0	1,123.3	2.37
DRREDDY	1,381.0	1,350.5	2.26
COALINDIA	442.90	435.40	1.72
ETERNAL	259.15	255.15	1.57
BEL	413.50	407.20	1.55

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
KOTAKBANK	397.00	409.00	-2.93
M&M	3,105.0	3,182.2	-2.43
ADANIENT	2,970.0	3,038.0	-2.24
TMPV	345.80	353.20	-2.10
INDIGO	5,337.3	5,450.0	-2.07

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	46695977	797.05	3,732.36
BHARTIARTL	10940130	1,846.0	2,013.59
BAJFINANCE	19875760	987.95	1,955.22
ICICIBANK	13249405	1,388.0	1,840.75
MARUTI	1358592	13,472	1,829.25

Most Active (by volume)

Name	Qty	Pr.	Value CR
TATASTEEL	62549132	189.90	1,186.9
NTPC	49895302	355.00	1,775.6
HDFCBANK	46695977	797.05	3,732.3
ONGC	38227413	234.10	894.75
KOTAKBANK	37210245	397.00	1,481.9

Indian equity benchmarks ended lower on Monday amid renewed geopolitical tensions in the Middle East. After making a cautious start, soon indices slipped into the red and remained under pressure throughout the session, weighed down by heavy selling in IT, auto and banking stocks. Traders remained on sidelines ahead of the release of India's Index of Industrial Production (IIP) data for May later in the day. Traders took note of the Crisil Ratings in its latest report has said that the profitability impact of the recent West Asia conflict on India Inc is expected to be far lower than initially projected if the US-Iran ceasefire remains intact and energy supplies continue to normalise. Credit rating agency ICRA said that the Indian commercial vehicles industry is expected to register a moderate YoY growth of 4-6 per cent in wholesale volumes in FY27 with the broadened base of last fiscal likely to have some bearing on the growth momentum of this year.

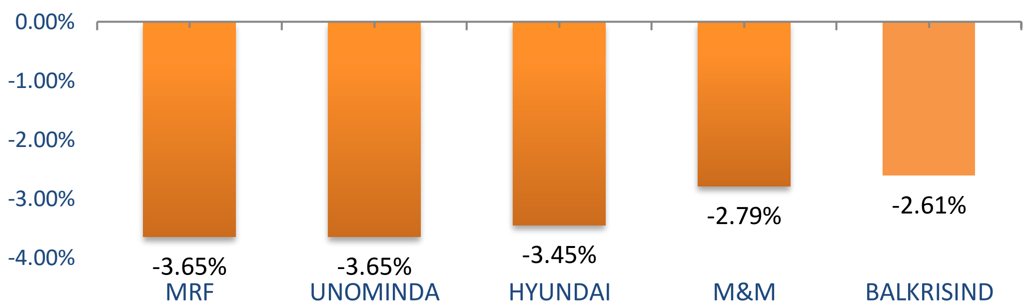
On the global front, European markets were trading mostly in the red as traders focus shifts to upcoming high-level U.S.-Iran talks in Qatar. Asian markets closed mostly higher despite the broadly negative cues from Wall Street on Friday.

Source: AceEquity

NEWS BULLETIN

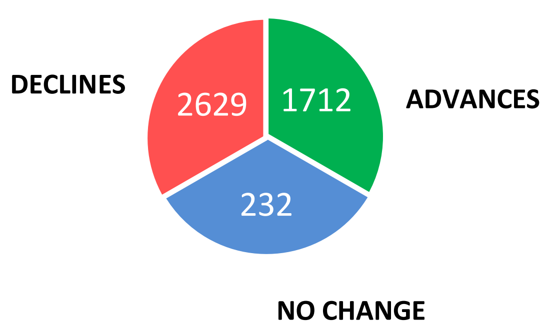
- **BEML** has received an additional export order valued at around $5.35 million from the Middle East region for the supply of heavy Earth Moving Equipment for Infrastructure development applications.
- **Refex Industries (RIL)** has procured an order worth around Rs 21.15 crore from a Maharatna Company for Transportation of ash to construction site of road projects of NHAI and other Central or State Government Road construction department / Authority / PMGSY Road Projects.
- **Ashoka Buildcon** has received LoA from Central Housing and Planning Authority, Guyana for Construction of Four Lane Highway from Versailles, West Bank Demerara to Parika, East Bank Essequibo, Region No. 3 - Lots 1-17. The accepted value of the project is GYD$ 7,455,455,867 ($35.42 million).

MARKET DRIVING SECTOR : AUTO



S&P BSE: AUTO
CLOSING: 58,408.83
CHANGE: - 1,258.13
CHANGE: - 2.11%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.85	20.66

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