END DAY COMMENTARY

30th JUNE 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,728.37	77,005.51	77,037.36	76,329.39	76,478.67	-249.70	-0.33
NIFTY	23,946.25	24,032.05	24,035.55	23,829.20	23,865.75	-80.50	-0.34

INDICES IN RED FOR THE SECOND CONSECUTIVE DAY

The 30-share BSE Sensex was down by 249.70 points or 0.33% to settle at 76,478.67 and the Nifty was down by 80.50 points or 0.34% to settle at 23,865.75. The BSE Small Cap 250 was up by 0.51% and BSE 500 was down by 0.01%. On the sectoral front, Auto, Oil & Gas, Consumer Durables, Capital Goods, Realty and Healthcare were gaining indices. On the flip side, Metal, IT, Banks and FMCG were losing indices. Maruti, Titan, Bajaj Finance, Eternal and Adani Ports were gainers on the Sensex; on the flip side, Infosys, TCS, HCL Tech, Tech Mahindra 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 positive note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
MARUTI	14,152	13,412	5.52
TITAN	4,423.1	4,277.2	3.41
BAJFINANCE	1,007.0	982.05	3.17
ADANIENT	3,040.0	2,962.5	2.62
ETERNAL	265.20	259.40	2.24

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
EICHERMOT	7,101.0	7,426.0	-4.38
TATACONSUM	1,073.0	1,112.8	-3.58
TCS	2,033.0	2,097.9	-3.09
INFY	1,006.0	1,036.7	-2.96
WIPRO	170.35	175.48	-2.92

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	45778356	800.45	3,656.09
ICICIBANK	18398057	1,379.9	2,535.01
INFY	24128263	1,006.0	2,430.39
MARUTI	1511415	14,152	2,113.61
RELIANCE	15695263	1,294.5	2,032.76

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	45778356	800.45	3,656.0
TATASTEEL	33686235	188.73	634.18
ETERNAL	32940948	265.20	864.93
WIPRO	26845383	170.35	460.08
KOTAKBANK	24824891	396.00	974.70

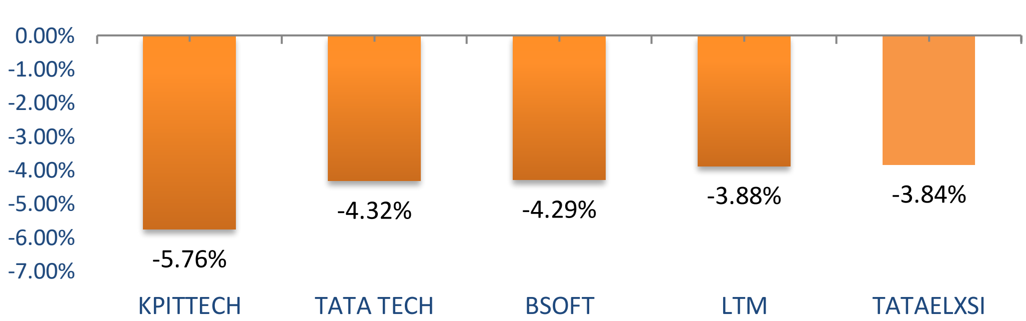
Indian equity benchmarks ended sharply lower on the monthly Nifty F&O expiry session. After making a slightly positive start, the indices slipped into negative territory and hovered around the neutral lines for most part of the session, as traders remained cautious ahead of the next round of U.S.-Iran negotiations scheduled to take place in Doha. In the final hour of trade, heavy selling in IT stocks intensified the decline, dragging markets deep in red. Some cautiousness also came as the Commerce and Industry Minister Piyush Goyal said that India's free trade agreement (FTA) negotiations with Israel and the six-nation GCC bloc are 'temporarily stalled' at present amid the West Asia crisis. Traders took note of the Reserve Bank of India's data on 'India's External Debt as at the end of March 2026' has stated that total external debt of India stood at $762.8 billion at the end of March 2026, registering an increase of $26.3 billion over the year-ago period.

On the global front, European markets were trading higher, led by a rebound in technology stocks amid renewed optimism over artificial intelligence (AI). Sentiments were further supported by expectations that the European Central Bank (ECB) is unlikely to raise interest rates in the near term.
Source: AceEquity

NEWS BULLETIN

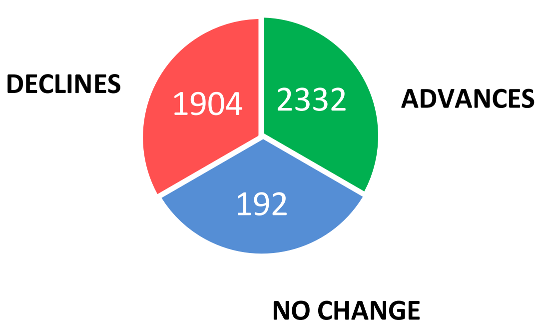
- **ITCONS E-Solutions** has bagged a new contract from the DG of Defence Estate, Department of Defence, Ministry of Defence to provide 5 resources for a period of 1 year. The total contract value is Rs 55.18 lakh.
- **Suzlon Energy** has secured its first 105 MW order for the next-generation turbine from Sunsure Energy. The order marks a strong commercial debut for S175, reinforcing strong customer confidence in the company's differentiated technology and innovation-led product portfolio. This is also Sunsure's third order with the company in less than 14 months, taking the cumulative partnership to 400.8 MW.
- **Railtel Corporation of India** has received the work order worth Rs 27.06 crore from The Goa Labour Welfare Board.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 25,718.08
CHANGE: - 654.83
CHANGE: - 2.48%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.87	20.58

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