# END DAY COMMENTARY

1st July 2026

Hem Securities
Building your wealth through values

BROKING | INVESTMENT BANKING | RESEARCH | DISTRIBUTION | DEPOSITORY|PMS

| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|---|---|---|---|---|---|---|---|
| SENSEX | 76,478.67 | 76,545.21 | 77,110.08 | 76,538.37 | 76,922.64 | +443.97 | +0.58 |
| NIFTY | 23,865.75 | 23,897.65 | 24,049.90 | 23,895.10 | 24,005.85 | +140.10 | +0.59 |

## INDICES ENDED THE DAY ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 443.97 points or 0.58% to settle at 76,922.64 and the Nifty was up by 140.10 points or 0.59% to settle at 24,005.85. The BSE Small Cap 250 was up by 0.19% and BSE 500 was up by 0.45%. On the sectoral front, Bank, FMCG, Auto, Realty, Consumer Durables and Oil &Gas were gaining indices. On the flip side, IT, Capital Goods, Healthcare and were losing indices. Eternal, Asian Paint, Hindustan Unilever, Adani Ports and Maruti were gainers on the Sensex; on the flip side, HCL Tech, Tech Mahindra, TCS, Tata Steel and Infosys were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a red note.

## MARKET STATS (NSE)

**Top Gainers**

| Name | Closing Pr. | Previous Pr. | %Ch |
|---|---|---|---|
| ETERNAL | 280.00 | 264.60 | 5.82 |
| ADANIENT | 3,143.0 | 3,036.0 | 3.52 |
| NESTLEIND | 1,453.0 | 1,405.2 | 3.40 |
| ASIANPAINT | 2,715.0 | 2,635.7 | 3.01 |
| HINDUNILVR | 2,181.5 | 2,118.2 | 2.99 |

**Top Losers**

| Name | Closing Pr. | Previous Pr. | %Ch |
|---|---|---|---|
| HCLTECH | 1,035.4 | 1,071.8 | -3.40 |
| TECHM | 1,360.0 | 1,404.7 | -3.18 |
| TCS | 1,981.8 | 2,031.5 | -2.45 |
| HINDALCO | 939.40 | 956.60 | -1.80 |
| TATASTEEL | 185.00 | 188.06 | -1.63 |

**Most Active (by value)**

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| HDFCBANK | 26094378 | 796.00 | 2,082.0 |
| MARUTI | 1397790 | 14,340.0 | 2,004.4 |
| ETERNAL | 66845146 | 280.00 | 1,836.7 |
| ICICIBANK | 11948034 | 1,377.6 | 1,645.4 |
| INFY | 13037982 | 986.00 | 1,295.9 |

**Most Active (by volume)**

| Name | Qty | Pr. | Value CR |
|---|---|---|---|
| ETERNAL | 66845146 | 280.00 | 1,836.7 |
| WIPRO | 34638511 | 169.85 | 591.14 |
| HDFCBANK | 26094378 | 796.00 | 2,082.0 |
| KOTAKBANK | 21723944 | 399.00 | 863.27 |
| TATASTEEL | 20614036 | 185.00 | 385.03 |

Indian equity benchmarks staged a strong rebound on Wednesday after falling for two consecutive sessions, as oil prices remained subdued despite uncertainty surrounding ongoing U.S.-Iran negotiations. Markets made a slightly positive start and extended their gains throughout the session, supported by gains in realty, FMCG and auto stocks. Sentiments remained upbeat as the Reserve Bank of India (RBI) stated that the Indian financial system remains resilient, underpinned by strong bank and non-bank balance sheets.

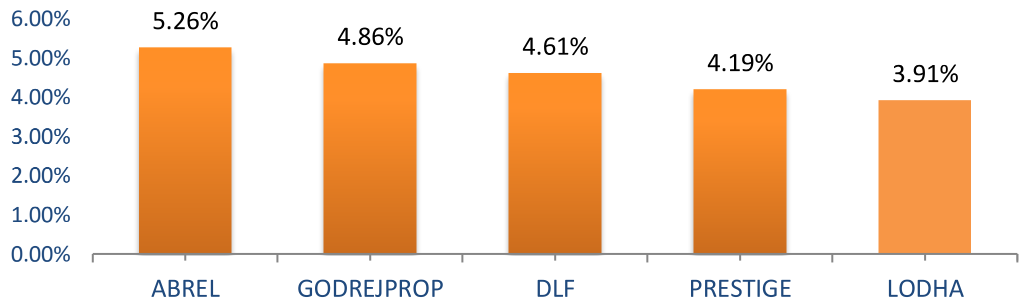
Govt extends temporary customs duty relief on key petrochemical imports till July 15: Traders took support after the Finance Ministry extended nil customs duty on imports of around 40 critical petrochemical products by another 15 days till July 15, 2026, providing temporary relief to industries facing supply uncertainties arising from geopolitical tensions in West Asia.

On the global front: European markets were trading mostly lower, despite Eurozone inflation eased to a three-month low in June, boosting expectations of further monetary policy easing by the European Central Bank. Asian markets closed mostly higher despite uncertainty over the progress of U.S.-Iran peace negotiations. Source: AceEquity

## NEWS BULLETIN

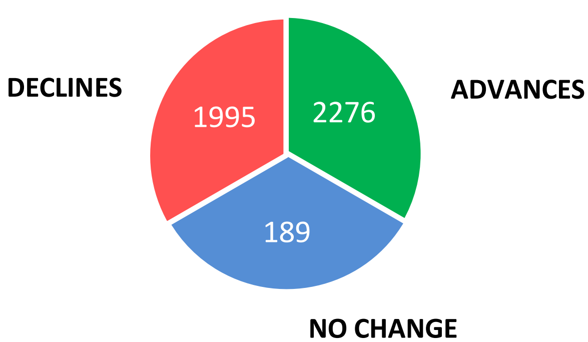
- **Eicher Motors and Volvo Group's joint venture (JV) company** -- VE Commercial Vehicles (VECV) has posted 29.28% rise in total sales at 9,519 units (Inclusive of EVs) in June 2026 as compared to 7,363 units in the same month last year.
- **Ashok Leyland** has launched India's first range of trucks with air suspension. The company has launched three breakthrough models -- AVTR 4925 10x2 MAV, AVTR 4625 10x2 MAV and AVTR 4525 8x2 MAV.
- **VA Tech Wabag** has been awarded a 'Large' Order by the City of Vienna, Municipal Department MA 31-Wiener Wasser, for the expansion of the Donauinsel Water Works in Vienna, Austria. The large order is valued in the range of $30 million to $75 million.

## MARKET DRIVING SECTOR : REALTY




**S&P BSE: REALTY**
**CLOSING: 6,704.00**
**CHANGE: +230.22**
**CHANGE: +3.56%**

## MARKET BREADTH – POSITIVE




## RATIO ANALYSIS

| PUT CALL RATIO | PE MULTIPLE OF NIFTY |
|---|---|
| 1.13 | 20.70 |

For Disclosure & Disclaimer, click here