END DAY COMMENTARY

02nd JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	76,922.64	77,083.14	77,578.93	77,063.95	77,502.12	+579.48	+0.75
NIFTY	24,005.85	24,062.20	24,194.55	24,058.80	24,175.70	+169.85	+0.71

INDICES CLOSED THE DAY WITH MODERATE GAINS

The 30-share BSE Sensex was up by 579.48 points or 0.75% to settle at 77,502.12 and the Nifty was up by 169.85 points or 0.71% to settle at 24,175.70. The BSE Small Cap 250 was up by 0.98% and BSE 500 was up by 0.71%. On the sectoral front, IT, Auto, Oil & Gas, Metal, Banks, FMCG, Consumer Durables, Realty and Healthcare were gaining indices. On the flip side, Capital Goods was losing index. Infosys, Tech Mahindra, TCS, HCL Tech and Bajaj Finserv were gainers on the Sensex; on the flip side, Larsen & Toubro, Maruti, Axis Bank, Reliance and BEL 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
INFY	1,042.6	985.30	5.82
TECHM	1,424.4	1,362.2	4.57
HCLTECH	1,081.4	1,034.2	4.56
TCS	2,070.9	1,982.6	4.45
BAJAJFINSV	1,859.1	1,797.6	3.42

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
MAXHEALTH	1,127.9	1,139.9	-1.05
LT	4,057.0	4,092.6	-0.87
AXISBANK	1,359.2	1,368.7	-0.69
NESTLEIND	1,445.7	1,453.8	-0.56
RELIANCE	1,301.9	1,308.0	-0.47

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	34143823	794.95	2,725.22
RELIANCE	17795024	1,301.9	2,320.35
ICICIBANK	15779429	1,401.0	2,201.78
INFY	18741111	1,042.6	1,937.98
SBIN	14682790	1,049.0	1,543.57

Most Active (by volume)

Name	Qty	Pr.	Value CR
WIPRO	43447174	174.00	753.55
ETERNAL	41301386	279.60	1,162.6
HDFCBANK	34143823	794.95	2,725.2
TATASTEEL	29139217	188.50	544.61
INFY	18741111	1,042.6	1,937.9

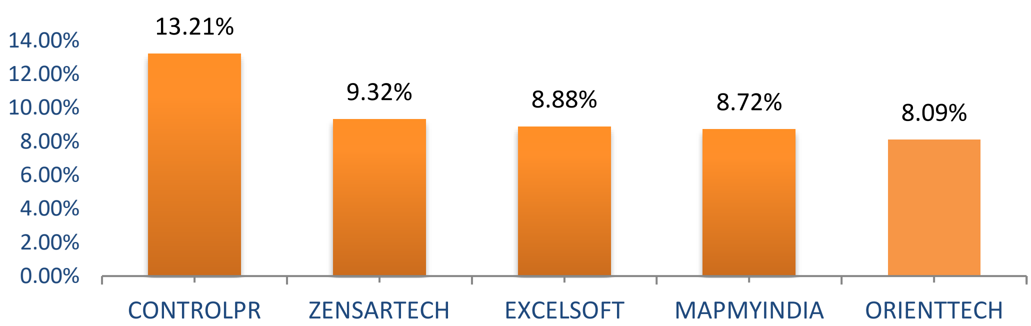
Indian equity benchmarks ended with strong gains on Thursday, led by robust buying in IT stocks. Markets made a slightly positive start and maintained steady upward momentum throughout the session, as investors' sentiments improved following the easing of geopolitical tensions in the Middle East after the US and Iran concluded talks in Doha. Sentiments remained upbeat as India and Japan have unveiled a raft of initiatives, including an economic partnership framework and a defence pact to co-develop military hardware following talks between Prime Minister Narendra Modi and his Japanese counterpart Sanae Takaichi. Traders took support with Crisil Ratings' report stated that microfinance institutions' (MFIs) assets under management growth is set to accelerate to 20 per cent in FY27 after a tepid 4 per cent increase in the past fiscal. Traders took note of S&P Global Ratings said that the concessional swap facility provided by the RBI would lower funding costs for many government-owned financial institutions that are now likely to increase their external borrowings.

On the global front, European markets were trading higher amid eased inflation and interest-rate concerns. Asian markets closed mixed after Qatar said that indirect U.S.-Iran talks have made 'positive progress'. Source: AceEquity

NEWS BULLETIN

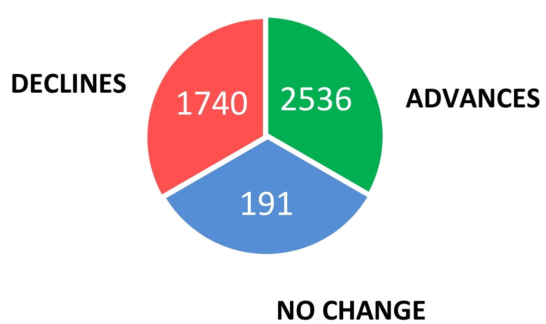
- **Force Motors** has reported 23.50% rise in its total sales (Domestic + Export) of Small Commercial Vehicles (SCV), LCV, UV and Sports Utility Vehicles (SUV) at 3,568 units for June 2026 as compared to 2,889 units sold in June 2025.
- **Crompton Greaves Consumer Electricals** has received an letter of empanelment and rate contract worth around Rs 29.77 crore (excluding GST) from MSEDCL for the design, manufacture, supply, transport, installation, testing & commissioning of 1397 number of Off-grid DC Solar Photovoltaic Water Pumping Systems.
- **HEC Infra Projects** has received work order worth Rs 48 crore from M/S Bharat Petroleum Corporation. This project was regarding a 66 KV Switchyard for the Capacity Augmentation Project of the Vadinar-Bina Crude Pipeline. The order is to be executed within 9 months.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 26,321.37
CHANGE: + 1,102.52
CHANGE: + 4.37%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.28	20.85

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