WEEKLY COMMENTARY

04 JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,100.46	77,055.21	78,157.52	76,329.39	77,763.91	+663.44	+0.86
NIFTY 50	24,056.00	24,061.75	24,378.15	23,829.20	24,270.85	+214.85	+0.89

INDICES ENDED THE WEEK WITH DECENT GAINS

Indian equity benchmark ended on a green note in the week ended 4 July, 2026. Key indices were positive in three out of five sessions of the week. The S&P BSE Sensex was up by 663.44 points or 0.86% to settle at 77,763.91 in the week ended 4 July, 2026. The CNX Nifty was up by 214.85 points or 0.89% to settle at 24,270.85. The BSE 500 index was up by 298.13 or 0.83% to settle at 36,431.45. The BSE Small-Cap index was up by 85.02 points or 1.21% to settle at 7,120.39.

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	281.65	255.15	10.39
BAJAJ FINSERV	1895.6	1764.6	7.42
ADANI ENTERPRIS	3212.1	3038.0	5.73
BAJAJ FINANCE	1031.4	980.40	5.20
MARUTI SUZUKI	14366.0	13745.0	4.52

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
L&T	4026.6	4216.4	-4.50
EICHER MOTORS	7339.50	7598.0	-3.40
HDFC LIFE INSU	567.70	585.45	-3.03
KOTAK BANK	396.75	409.00	-3.00
TMPV	344.10	353.20	-2.58

Most Active (by value)

Name	Avg Value	Pr.	Qty
HDFC BANK	14305.5	801.05	1785844.80
ICICI BANK	10201.1	1411.4	722767.12
INFOSYS	8654.2	1047.2	826417.92
RELIANCE	8096.3	1304.0	620888.96
MARUTI	7152.9	14366.0	49790.73

Most Active (by volume)

Name	Avg Value	Pr.	Qty
ETERNAL	5985.9	281.65	2125314.72
HDFC BANK	14305.5	801.05	1785844.80
TATA STEEL	3311.3	189.80	1744630.88
WIPRO	2798.8	176.08	1589538.40
KOTAK BANK	4423.2	396.75	1114874.40

INSTITUTIONAL NET POSITION

FIIs Cash	-4,003.84
FIIs Index Future	-7,791.87
FIIs Stock Future	+2,200.86
DIIs Cash	+12,633.54

On Monday, 29 Jun, 2026, the key equity indices ended lower amid profit booking. The S&P BSE Sensex declined 372.10 points or 0.48% to 76,728.37. On Tuesday, 30 Jun, 2026, the benchmark indices ended lower. The S&P BSE Sensex declined 249.70 points or 0.33% to 76,478.67. On Wednesday, 1 July, 2026, the key equity indices ended higher after two-day losing streak. The S&P BSE Sensex jumped 443.97 points or 0.58% to 76,922.64. On Thursday, 2 July, 2026, the benchmark indices extended their gains. The S&P BSE Sensex surged 579.48 points, or 0.75%, to 77,502.12. On Friday, 3 July, 2026, The key domestic indices rose for the third straight session. The S&P BSE Sensex gained 261.79 points or 0.34% to 77,763.91.

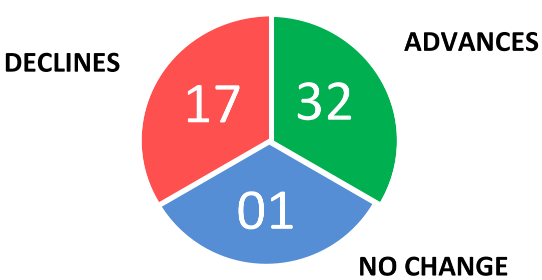
MARKET WATCH- LAST WEEK

Benchmark indices ended the week with gains, supported by resilient domestic fundamentals, broad-based buying interest, positive stock-specific developments, and continued expansion in India's manufacturing and services sectors. Investor sentiment was further aided by expectations of easier global monetary policy following softer U.S. labour market data and easing Eurozone inflation, although gains were tempered by a moderation in India's services PMI and mixed global cues.

MARKET WATCH- COMING WEEK

Indian equities are expected to trade with a positive bias during the week, supported by lower crude oil prices, resilient domestic economic indicators, and expectations of easier global monetary policy following weaker U.S. labour market data. However, investors will closely monitor developments in the U.S.–Iran situation, along with India's bank credit growth, deposit growth, and foreign exchange reserves, for further market direction.

NIFTY MARKET BREADTH (W) - POSITIVE

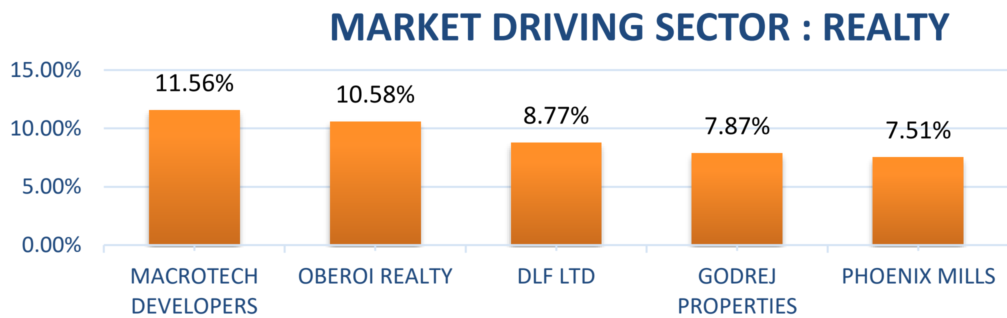


RATIO ANALYSIS

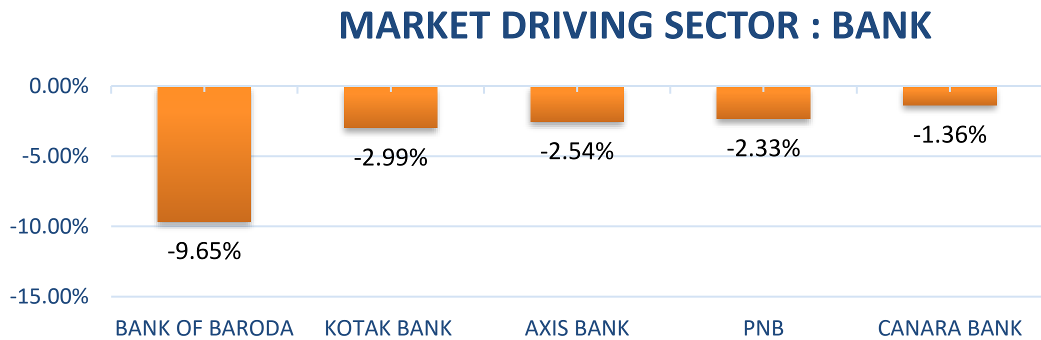
PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.07	20.92

NEWS BULLETIN

- **Fortis** Healthcare has signed an Operations and Management (O&M) agreement with Dion Group, one of Odisha's leading real estate and infrastructure development groups, for a 300-bed greenfield multi-specialty hospital to be developed at Dion Riverside Township, Trishulia in Cuttack, Odisha.
- **NBCC (India)** has secured work orders worth around Rs 132.28 crore (excluding GST). Of the total, the company has received an order worth Rs 55.46 crore from Navodaya Vidyalaya Samiti for the construction of a permanent campus at JNV, South Salmara district, Assam. It has also received another order worth Rs 55.46 crore from Navodaya Vidyalaya Samiti for the construction of a permanent campus at JNV, West Karbi Anglong district, Assam.
- **Coal India** has signed Joint venture (JV) agreement with U.P. Rajya Vidyut Utpadan Nigam (UPRVUNL) for setting up of renewable energy projects in Uttar Pradesh including ground mounted solar, floating solar, pumped storage projects, wind projects and other renewable energy projects, and sale of power and related business activities.



NIFTY REALTY
CLOSING: 890.80
CHANGE: +64.55
CHANGE: +7.81%



NIFTY BANK
CLOSING: 57,938.50
CHANGE: -238.55
CHANGE: -0.41%

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