

**20 May 2026**



# **PRIME END OF THE DAY SUMMARY**



## Nifty Recovers from Early Slide, Holds Higher Lows Amid Rupee Weakness

For the last five trading sessions, Nifty has again slipped into an alternating pattern of one session of gain followed by one session of loss. Today, the index opened 161 points lower, hit its intraday low in the very first few minutes of trade, and then reversed course sharply. Nifty registered a smart intraday recovery of nearly 300 points from the morning low of 23,397 to finally settle at 23,659, up 41 points. NSE cash-market turnover fell by about 12% compared with the previous session.

Among index heavyweights, Hindalco, Reliance, and Bajaj Auto advanced the most, while BEL, Tech Mahindra, and Eternal emerged as key laggards. Sectoral performance was mixed, with Oil & Gas, Auto, and Realty indices logging the strongest gains, while Nifty Media, FMCG, Chemical, and IT ended in the red. The broader market moved in sync with the benchmark, with the Nifty Midcap 100 rising 0.49% and the Nifty Smallcap 100 holding in positive territory with a minor gain of 0.04%. Market breadth remained neutral, as the BSE advance–decline ratio stood at 1.07.

The rupee closed 29 paise weaker at 96.83 against the dollar, marking a fresh all-time low, with today's intraday low at 96.9650. The sharp rupee weakness likely reflects persistent FII outflows, elevated crude prices, and safe-haven demand for the dollar amid global risk-off sentiment.

Despite these negative cues, Nifty has managed to absorb supply at lower levels and is forming higher lows on a short-term time frame. Support for the index now moves up to around 23,370, derived from an upward-sloping trend line joining the recent higher swing lows. On the upside, 23,800 is a crucial resistance; a close above this level could extend the pullback towards the 50-day EMA, currently near 24,030.

### DOMESTIC INDICES

	CLOSE	POINTS	% CHANGE
SENSEX	75,318.39	117.54	0.16
NIFTY	23,659.00	41.00	0.17
BSE MIDCAP	16,327.00	83.05	0.51
BSE SMALLCAP	6,653.79	6.05	0.09

### BSE SECTORAL INDICES

	CLOSE	POINTS	% CHANGE
POWER	8075.3	141.03	1.78
CAP GOODS	77278.48	1160.31	1.52
OIL & GAS	27025.36	365.92	1.37
INDUSTRIALS	15668.12	141.29	0.91
AUTO	57025.1	462.53	0.82
REALTY	5988.32	31.45	0.53
METAL	42935.22	148.97	0.35
BANKEX	60339.97	168.13	0.28
HEALTHCARE	47670.15	110.05	0.23
FINANCE	11865.04	11.3	0.10
CONS DURABLES	57401.18	-84.95	-0.15
IT	28306.82	-68.08	-0.24

### BSE 200 GAINERS/LOSERS

GAINERS	% Change	LOSERS	% Change
ENRIN	9.33	PIIND	-7.08
TATACOMM	8.07	M&MFIN	-3.38
GVTD	7.07	LTM	-2.61
POWERINDIA	6.34	ICICIPRULI	-2.57
ABB	4.43	ICICIGI	-2.38



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NIFTY MOST ACTIVE EQUITIES (VALUE)	
STOCK NAME	VALUE (Rs Cr)
APOLLO	2,652
MTARTECH	2,172
BSE	1,969
ICICIBANK	1,843

NSE 52 WEEK HIGH/LOW	
52-WK HIGH	66
52-WK LOW	46

NSE UPPER/LOWER CIRCUIT	
UPPER CIRCUIT	100
LOWER CIRCUIT	96

NSE ADVANCE/DECLINES	
ADVANCES	1722
DECLINES	1543
UNCHANGED	107
<b>ADV/DEC Ratio</b>	<b>1.12</b>

NIFTY 50 INDEX CONTRIBUTORS		
Pullers	RELIANCE	55.63
	HINDALCO	11.54
	AXISBANK	8.06
	BAJAJ-AUTO	6.29
	M&M	5.40

Draggers	HDFCBANK	-7.83
	BEL	-7.52
	ICICIBANK	-6.73
	ETERNAL	-5.79
	INFY	-5.26

FX & COMMODITIES		
	VALUE	% CHANGE
USD/INR	96.82	0.30
IND10 YR BOND YIELD	7.12	-0.08
GOLD (\$ / OUNCE)	4496.29	0.31
SILVER (\$ / OUNCE)	75.7	2.67
CRUDE OIL FUTURES (\$ / BARREL)	101.84	-2.22
GOLD (RS. / 10 GRAMS)	159236	0.10
SILVER (RS. / KG)	273950	1.42

## NIFTY 50 INDEX HEATMAP

HINDALCO 1085 3.50%	RELIANCE 1360.3 2.84%	BAJAJ-AUTO 10462.5 2.52%	GRASIM 2983 1.63%	TRENT 4113 1.07%	AXISBANK 1251.2 1.04%	WIPRO 197.2 1.04%	INDIGO 4274.2 1.04%	M&M 3119.9 0.89%
NTPC 392.5 0.80%	MAXHEALTH 1076.95 0.77%	ONGC 298.65 0.73%	POWERGRID 300.7 0.70%	BAJAJFINSV 1761.8 0.69%	JIOFIN 234.8 0.65%	APOLLOHOSP 8075 0.61%	ULTRACEMCC 11429 0.54%	COALINDIA 459 0.45%
ADANI PORTS 1770 0.41%	MARUTI 13004 0.37%	KOTAKBANK 383 0.27%	BAJFINANCE 925.45 0.21%	ASIANPAINT 2605 0.17%	SBIN 950 0.13%	TITAN 4104.7 0.07%	TATA CONSUM 1210 -0.07%	TMPV 360.85 -0.10%
SUNPHARMA 1880 -0.12%	TCS 2324.1 -0.13%	LT 3912 -0.23%	SHRIRAMFIN 925 -0.25%	BHARTIARTL 1908.2 -0.28%	HDFCBANK 760.1 -0.31%	EICHERMOT 6859 -0.34%	ICICIBANK 1236.5 -0.35%	JSWSTEEL 1278.4 -0.53%
INFY 1190 -0.58%	HCLTECH 1172.2 -0.61%	NESTLEIND 1422.2 -0.64%	CIPLA 1400.1 -0.69%	ADANI ENT 2705.5 -0.72%	ITC 307.9 -0.77%	HDFCLIFE 605.35 -0.83%	HINDUNILVR 2212 -0.94%	DRREDDY 1320.9 -1.07%
SBILIFE 1861.1 -1.08%	TATASTEEL 207 -1.09%	ETERNAL 243.5 -1.50%	TECHM 1439 -1.92%	BEL 413.35 -2.27%				



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