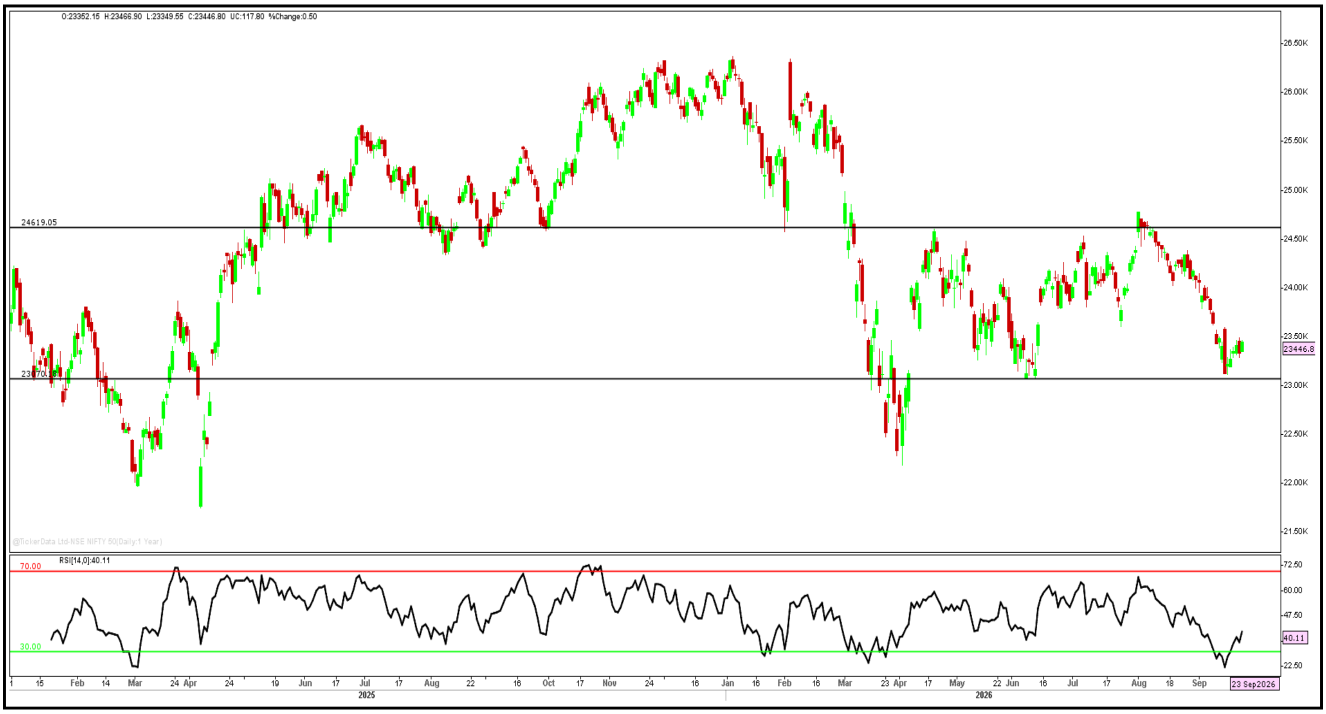
PROGRESSIVE'S EVENING STROLL DATE: 23 September, 2026

Market Snapshot:

After a steady start, the Index continued to build on its gains at regular intervals, eventually closing at 23,446.80, up by 117.80 points. Among the sectors, Metals led the gains, followed by Capital Markets and FMCG, while IT continued to lag. In the broader market, both the Midcap and Smallcap indices outperformed the Benchmark Index.

HOW THE DAY TRENDED



INDICES			
Index	**Close**	**Points**	**%Chg.**
Sensex	74828.25	299.17	**0.40**
Nifty50	23446.80	117.80	**0.50**
Nifty Midcap 100	62396.45	433.30	**0.70**
Nifty Small Cap 100	19991.50	176.05	**0.89**

SECTORAL GAINERS / LOSERS			
Sectors	**Close**	**Points**	**%Chg.**
NIFTY METAL	13302.35	312.00	**2.40**
NIFTY CAPITAL MKT	5364.85	83.20	**1.58**
NIFTY FMCG	46259.35	601.60	**1.32**
NIFTY IT	28334.05	(248.05)	**(0.87)**

NIFTY TOP GAINERS / LOSERS					
Gainers	**CMP (Rs)**	**%Chg.**	**Losers**	**CMP (Rs)**	**%Chg.**
BAJAJ FINANCE	1043.20	**3.41**	HCL TECH	1256.70	**(1.08)**
HINDALCO	1003.80	**3.17**	TITAN	4880.00	**(0.98)**
TATA STEEL	190.82	**3.16**	INFY	1020.50	**(0.86)**
APOLLO HOSPITAL	9069.00	**2.64**	COAL INDIA	424.55	**(0.81)**

INDICES LEVELS FOR September 24, 2026

Nifty (future)	
Resistance	23600
Support	23300

Bank Nifty (future)	
Resistance	57100
Support	56200

PROGRESSIVE'S EVENING STROLL **DATE: 23 September, 2026**

KEY TAKEAWAYS OF THE DAY

♦ **Persistent Systems buys additional stake to get 83.2% control of Nagarro:**

Persistent Systems has secured 75.68 lakh equity shares, representing approximately 61.15% of Nagarro SE's outstanding share capital, through a voluntary public takeover offer. The company had already acquired an approx. 22.10% stake in Nagarro under a share purchase agreement with Lantano Beteiligungen GmbH. As a result, Persistent Systems' aggregate shareholding in Nagarro stood at 83.25%, excluding treasury shares.

♦ **Lemon Tree Hotels opens Nashik debut with 48 rooms:**

Lemon Tree Hotels has announced the opening of Keys Prima by Lemon Tree Hotels in Nashik, marking the Group's first hotel in the city and further strengthening its presence in Maharashtra. The opening increases the group's operational count in Maharashtra to 15 hotels, with 16 more in the pipeline.

♦ **HCL Tech secures AI-led IT transformation deal at M Group:**

HCLTech has been selected by UK-based infrastructure services provider M Group to modernize IT operations across 200-plus locations. The company said it will deploy its AI Force service transformation platform as part of the AI-led managed services programme.

♦ **Sugs Lloyd receives Rs213.48cr Letter of Award for Punjab RDSS works:**

The company has secured a Rs213.48cr order from Marshal Enterprises for LT and HT infrastructure loss-reduction works under the RDSS scheme in Punjab. The projects were originally awarded by PSPCL.

♦ **Allied Blenders co-promoter to sell 55 lakh shares to meet public shareholding rules:**

Allied Blenders & Distillers co-promoter Bina Kishore Chhabria is selling up to 55 lakh shares (~1.97% stake) between September 23 and October 31, 2026, to comply with Minimum Public Shareholding norms. Promoters currently hold 80.91% of the equity and have committed to not acquiring shares on transaction days to ensure market integrity.

Source: Media Reports

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