

Market Snapshot

KEY INDICES	30-Apr-26	24-Apr-26	05-Sep-25
S&P CNX NIFTY	23997.55	23897.95	0.42
SENSEX	76913.50	76664.21	0.33
NIFTY MIDCAP 100	59784.85	59374.80	0.69
NIFTY SMLCAP 100	18007.15	17567.20	2.50

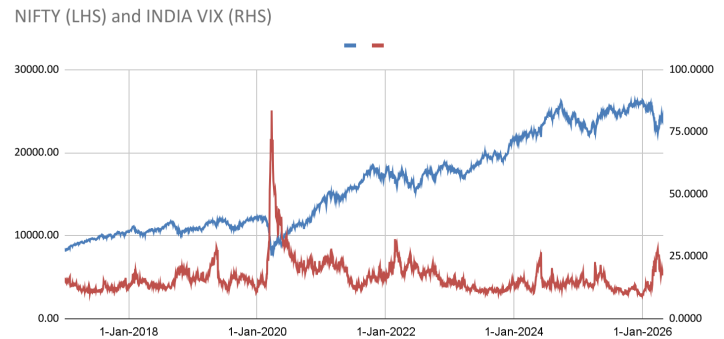
(Source: Capitaline, [Investing.com](https://www.investing.com))

Sectoral Snapshot

KEY INDICES	30-Apr-26	24-Apr-26	%Ch
NIFTY BANK	54863.35	56089.75	-2.19
NIFTY AUTO	25917.60	25652.85	1.03
NIFTY FMCG	51072.10	50766.25	0.60
NIFTY IT	29353.90	28530.60	2.89
NIFTY METAL	12833.05	12746.65	0.68
NIFTY PHARMA	23267.70	22580.10	3.05
NIFTY REALTY	793.55	778.00	2.00
BSE CG	77210.23	77089.06	0.16
BSE CD	59099.45	59083.00	0.03
BSE Oil & GAS	27683.54	27038.25	2.39
BSE POWER	8156.30	8067.49	1.10

(Source: [Investing.com](https://www.investing.com))

Nifty Vs. INDIA VIX



(Source: [NSE](https://www.nseindia.com))

Benchmarks end week marginally higher amid volatility

The domestic equity benchmarks ended the week with marginal gains, amid a volatile and range-bound trading environment driven by mixed global and domestic cues. During the four trading sessions, the market followed a roller-coaster path, moving up and down and closing alternately in red, reflecting a lack of clear directional trend. The week started on a positive note, supported by easing geopolitical tensions and steady Q4 earnings, which helped lift investor sentiment. However, gains gradually faded as concerns over surging crude oil prices, weak Asian cues, and persistent foreign fund outflows weighed on markets. Sentiment remained cautious throughout the week amid heightened volatility triggered by exit poll expectations, a weakening rupee, and continued selling pressure from foreign institutional investors (FIIs). By the end of the week, these negative factors capped overall gains, resulting in a choppy and indecisive trading pattern for equities, despite intermittent recovery attempts during select sessions.

In the week ended on Friday, 30 April 2025, the S&P BSE Sensex added 249.29 points or 0.32% to settle at 76,913.50.

FII & DII Activities (Rs Crore)

24/04/2026 to 30/04/2026

Activities	FIIs	DIIIs
Buy	67790.12	95067.72
Sell	87140.28	78781.81
Net	-19350.16	16285.91

(Source: Capitaline)

Sensex Gainers - Weekly

SCRIPS	30-Apr-26	24-Apr-26	%Ch
SUNPHARMA	1808.20	1619.95	11.62
TECHM	1474.05	1360.05	8.38
INDUSINDBK	915.55	848.30	7.93
RELIANCE	1430.85	1327.65	7.77
ITC	314.95	301.60	4.43

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	30-Apr-26	24-Apr-26	%Ch
AXISBANK	1267.70	1366.10	-7.20
ICICIBANK	1262.75	1326.30	-4.79
ULTRACEMCO	11582.80	12010.50	-3.56
HINDUNILVR	2250.60	2329.00	-3.37
SBIN	1068.00	1101.50	-3.04

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	30-Apr-26	24-Apr-26	%Ch
SUNPHARMA	1808.30	1620.40	11.60
TECHM	1473.50	1358.50	8.47
INDUSINDBK	916.05	847.95	8.03
RELIANCE	1430.80	1327.80	7.76
COALINDIA	481.45	456.00	5.58

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	30-Apr-26	24-Apr-26	%Ch
AXISBANK	1268.30	1365.90	-7.15
ICICIBANK	1263.40	1326.20	-4.74
ULTRACEMCO	11586.00	11998.00	-3.43
HINDUNILVR	2250.90	2327.30	-3.28
SHREECEM	24195.00	24950.00	-3.03

(Source: Capitaline)

The Nifty 50 index rose 99.6 points or 0.41% to settle at 23,997.55. The BSE 150 MidCap Index gained 0.31% to close at 16087.54. The BSE 250 SmallCap index jumped 1.97% at 6,661.52.

India's industrial production growth rate for the month of March is 4.1%, slower from 5.2% in the month of February, government data showed. The latest Index of Industrial Production (IIP) print marks the weakest expansion since October 2025, when factory output had risen just 0.5%. The growth rates of the three sectors, Mining, Manufacturing and Electricity for the month of March are 5.5%, 4.3 percent and 0.8% respectively. The Quick Estimates of IIP stands at 173.2 against 166.3 in March 2025. The Indices of Industrial Production for the Mining, Manufacturing and Electricity sectors for the month of March 2026 stand at 166.8, 169.4 and 221.3 respectively.

Global Markets:

China's industrial firms grew at their fastest pace in six months in March, even as the Middle East war upended global oil markets and sent raw material costs soaring.

Industrial profits jumped 15.8% from a year earlier in March, the sharpest growth since September last year, National Bureau of Statistics data showed Monday, accelerating from the 15.2% surge in the first two months of this year.

In the first three months this year, enterprise profits expanded 15.5%, the fastest start to a year since 2017, barring the pandemic-driven spike in 2021.

The Bank of Japan kept its policy rate unchanged at 0.75% in April 2026 (6-3 vote), amid geopolitical uncertainty and rising energy prices. The central bank raised its FY26 inflation forecast to 2.8% (from 1.9%) but cut its growth outlook to 0.5% (from 1.0%). FY25 GDP projection was marginally increased to 1.0%.

Japan's unemployment rate rose to 2.7% in March 2026 from 2.6% in February, slightly above expectations. The

Nifty Midcap 100 Gainers - Weekly

SCRIPS	30-Apr-26	24-Apr-26	%Ch
TATACHEM	809.00	693.25	16.70
DEVYANI	124.73	106.98	16.59
BANDHANBNK	199.72	174.67	14.34
SYNGENE	467.65	421.20	11.03
CROMPTON	272.36	250.23	8.84

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	30-Apr-26	24-Apr-26	%Ch
SHRIRAMFIN	937.35	1011.30	-7.31
INDIANB	851.85	909.90	-6.38
UNIONBANK	165.94	177.00	-6.25
RECLTD	354.30	374.00	-5.27
BANKINDIA	139.87	147.44	-5.13

(Source: Capitaline)

World Markets

KEY INDICES	01-May-26	24-Apr-26	%Ch
DJIA	49499.27	49230.71	0.55
NASDAQ	25114.44	24836.60	1.12
BOVESPA	CLOSED	190745.02	-
FTSE 100	10363.93	10379.08	-0.15
CAC 40	CLOSED	8157.82	-
DAX	CLOSED	24128.98	-
MOEX RUSSIA	CLOSED	2733.00	-
NIKKEI 225	59513.12	59716.18	-0.34
HANG SENG	CLOSED	25978.07	-
STRAITS TIMES	CLOSED	4922.86	-
SHANGHAI COMPOSITE	CLOSED	4079.90	-
JAKARTA	CLOSED	7129.49	-

(Source: Capitaline, [Investing.com](https://www.investing.com))

number of unemployed increased to 1.86 million, while employment declined to 68.15 million and the labour force shrank to 70.02 million. Meanwhile, the number of people outside the labour force rose to 39.54 million. The labour force participation rate edged up to 63.6%, and the jobs-to-applicants ratio eased to 1.18 from 1.19 in the previous month.

The United Arab Emirates will exit OPEC on May 1, in a major blow to the cartel that coordinates production among many of the world's largest oil producers, particularly those in the Middle East.

The U.S. Federal Reserve held interest rates steady at its meeting on 29 April 2026, keeping the federal funds rate in a target range of 3.5% to 3.75%.

Outlook and Technical View

US-Iran talks to remain in focus. Blockage across Strait of Hormuz to be in focus. Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 23835, 23670, 23544, 23402 while levels of 24125, 24252, 24416, 24502 may act as resistance with pivot point at 23961.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	26-May-26	24136.70	24034.70	0.42%	139.15	609190	306894	98.50%
BANKNIFTY	26-May-26	55300.00	56455.00	-2.05%	436.65	5584	18878	-70.42%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
JINDALSTEL	1223.10	1232.60	26-May-26	10.90%
PIDILITIND	1375.70	1385.30	26-May-26	9.80%
KOTAKBANK	383.30	385.90	26-May-26	9.52%
SAIL	184.62	185.83	26-May-26	9.20%
BOSCHLTD	35995.00	36230.00	26-May-26	9.17%
UPL	641.85	646.00	26-May-26	9.08%
CHOLAFIN	1562.90	1573.00	26-May-26	9.07%
PETRONET	276.76	278.53	26-May-26	8.98%
PFC	448.40	451.25	26-May-26	8.92%
CUMMINSIND	5266.40	5299.80	26-May-26	8.90%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
WIPRO	200.65	196.75	26-May-26	-27.29%
TCS	2473.90	2440.60	26-May-26	-18.90%
SHREECEM	24195.00	24030.00	26-May-26	-9.57%
SBIN	1068.45	1064.10	26-May-26	-5.72%
JUBLFOOD	478.60	477.00	26-May-26	-4.69%
COLPAL	2096.20	2091.60	26-May-26	-3.08%
GODREJCP	1067.10	1064.80	26-May-26	-3.03%
NATIONALUM	399.30	398.45	26-May-26	-2.99%
DRREDDY	1322.90	1321.00	26-May-26	-2.02%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	40769365	36611965	1.11

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. SUNPHARMA	2. GLENMARK	3. ALKEM	4. AXISBANK	5. UNIONBANK
6. ICICIBANK	7. AUBANK	8. CANBK	9. BANKBARODA	10. PNB
11. SBIN	12. FEDERALBNK			

(Source: [Moneycontrol](#))

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