

Market Snapshot

KEY INDICES	02-Apr-26	27-Mar-26	05-Sep-25
S&P CNX NIFTY	22713.10	22819.60	-0.47
SENSEX	73319.55	73583.22	-0.36
NIFTY MIDCAP 100	53677.05	54097.80	-0.78
NIFTY SMLCAP 100	15650.50	15620.00	0.20

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

Sectoral Snapshot

KEY INDICES	02-Apr-26	27-Mar-26	%Ch
NIFTY BANK	51548.75	52274.60	-1.39
NIFTY AUTO	24089.65	24351.95	-1.08
NIFTY FMCG	46232.15	46427.20	-0.42
NIFTY IT	30441.45	29541.65	3.05
NIFTY METAL	11456.60	11161.65	2.64
NIFTY PHARMA	21808.40	22565.60	-3.36
NIFTY REALTY	672.10	670.15	0.29
BSE CG	64385.10	65702.59	-2.01
BSE CD	52061.58	53711.49	-3.07
BSE Oil & GAS	25073.03	25653.49	-2.26
BSE POWER	6559.05	6797.83	-3.51

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

FII & DII Activities (Rs Crore)

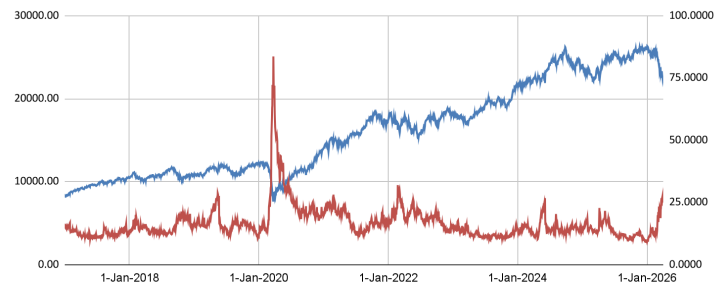
27/03/2026 to 02/04/2026

Activities	FIIs	DIIs
Buy	78516.05	100895.64
Sell	103883.62	68054.56
Net	-25367.57	32841.08

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Market ends marginally lower after a turbulent week of swings

Domestic equity benchmarks ended with marginal losses during the week, amid heightened volatility driven by global and domestic uncertainties. The week began on a weak note as rising US-Iran tensions and a surge in crude oil prices weighed heavily on sentiment, triggering broad-based selling.

Markets rebounded mid-week on easing geopolitical concerns and softer oil prices, which helped restore risk appetite. However, volatility persisted, with benchmarks witnessing sharp intraday swings due to fluctuating global cues and macroeconomic pressures. Despite a strong recovery in later sessions led by IT and metal stocks, caution prevailed among investors due to continued FII outflows, rupee weakness, and inflation concerns. Overall, the market remained range-bound with a slightly negative bias during the week.

In the week ended on Friday, 02 April 2026, the S&P BSE Sensex declined 263.67 points or 0.36% to settle at 73,319.55. The Nifty 50 index slipped 106.50 points or 0.47% to settle at 22,713.10. The BSE 150 MidCap Index shed 0.55%

Sensex Gainers - Weekly

SCRIPS	02-Apr-26	27-Mar-26	%Ch
TECHM	1441.50	1391.00	3.63
TITAN	4097.75	3981.40	2.92
HCLTECH	1401.85	1363.70	2.80
TCS	2451.65	2389.85	2.59
INFY	1300.45	1270.00	2.40

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	02-Apr-26	27-Mar-26	%Ch
SUNPHARMA	1694.65	1795.65	-5.62
NTPC	360.00	375.90	-4.23
ULTRACEMCO	10626.70	11051.85	-3.85
BAJAJFINSV	1640.65	1694.50	-3.18
BHARTIARTL	1789.55	1842.15	-2.86

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	02-Apr-26	27-Mar-26	%Ch
HINDALCO	916.25	866.70	5.72
TECHM	1441.50	1391.60	3.59
GAIL	141.73	137.19	3.31
ADANI PORTS	1377.60	1337.80	2.98
TITAN	4097.20	3981.50	2.91

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	02-Apr-26	27-Mar-26	%Ch
HDFCLIFE	566.10	610.20	-7.23
SUNPHARMA	1693.60	1793.60	-5.58
DRREDDY	1217.30	1281.70	-5.02
NTPC	359.65	375.65	-4.26
CIPLA	1192.40	1242.30	-4.02

(Source: Capitaline)

to close at 14,567.37. The BSE 250 SmallCap index rose 0.82% at 5,843.57.

India's Index of Industrial Production (IIP) grew 5.2% year-on-year in February, up from 4.8% in January, according to government data released on 30 March 2026. The rise was led by stronger manufacturing output, while mining and electricity posted moderate growth.

Manufacturing output expanded 6.0% during the month. Mining output rose 3.1%, while electricity generation increased 2.3%.

The HSBC India Manufacturing PMI fell to 53.9 in March 2026 from 56.9 in February, slightly higher than preliminary estimates of 53.8.

Global Markets:

Retail trade in Spain rose 2.2% YoY in February 2026, slowing from a revised 3.8% in January and below expectations. Growth eased across food and non-food segments, while retail sales dipped 0.1% MoM.

Spain's manufacturing PMI fell to 48.7 in March, indicating contraction. while Germany's PMI rose to 52.2, signaling expansion.

The Bank of Japan's Tankan survey showed business sentiment among large manufacturers rising to 17 in Q1 2026 from 15 in the previous quarter, beating expectations of 16 and marking the highest level since Q4 2021.

In China, manufacturing activity moderated, with the PMI easing to 50.8 in March from 52.1 in February and below expectations of 51.6, though still indicating expansion.

(Source: Capitaline)

Nifty Midcap 100 Gainers - Weekly

SCRIPS	02-Apr-26	27-Mar-26	%Ch
TTML	36.36	33.13	9.75
TATACHEM	651.90	605.35	7.69
PERSISTENT	5227.70	4899.80	6.69
COFORGE	1213.40	1144.70	6.00
SAIL	155.16	146.47	5.93

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	02-Apr-26	27-Mar-26	%Ch
ASHOKLEY	148.44	163.09	-8.98
VOLTAS	1235.40	1322.60	-6.59
IPCALAB	1488.30	1586.00	-6.16
MFSL	1464.20	1557.10	-5.97
SYNGENE	391.10	415.60	-5.90

(Source: Capitaline)

World Markets

KEY INDICES	03-Apr-26	27-Mar-26	%Ch
DJIA	46504.67	45166.64	2.96
NASDAQ	21879.18	20948.36	4.44
BOVESPA	188052.02	181556.77	3.58
FTSE 100	10436.29	9967.35	4.70
CAC 40	7962.39	7701.95	3.38
DAX	23168.08	22300.75	3.89
MOEX RUSSIA	2760.70	2789.61	-1.04
NIKKEI 225	53123.49	53373.07	-0.47
HANG SENG	25116.53	24951.88	0.66
STRAITS TIMES	4947.50	4898.18	1.01
SHANGHAI COMPOSITE	3880.10	3913.72	-0.86
JAKARTA	7026.78	7097.06	-0.99

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

Outlook and Technical View

US-Israel war with Iran to remain in focus. Blockage across Strait of Hormuz to remain 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 22336, 21959, 21736, 21552 while levels of 22935, 23159, 23535, 23702 may act as resistance with pivot point at 22559.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	28-Apr-26	22773.00	22894.80	-0.53%	-341.50	857176	573823	49.38%
BANKNIFTY	28-Apr-26	51910.20	52505.00	-1.13%	-1540.80	164814	120052	37.29%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	155.16	156.51	28-Apr-26	12.21%
BANDHANBNK	146.34	147.45	28-Apr-26	10.65%
NMDC	78.08	78.67	28-Apr-26	10.61%
IDEA	8.58	8.64	28-Apr-26	9.82%
JINDALSTEL	1137.90	1145.10	28-Apr-26	8.88%
RBLBANK	301.00	302.90	28-Apr-26	8.86%
TORNTPOWER	1332.20	1340.60	28-Apr-26	8.85%
BANKBARODA	249.56	251.07	28-Apr-26	8.49%
HEROMOTOCO	5011.50	5040.50	28-Apr-26	8.12%
GODREJPROP	1508.30	1517.00	28-Apr-26	8.10%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
JUBLFOOD	446.55	435.50	28-Apr-26	-34.74%
HCLTECH	1402.20	1370.30	28-Apr-26	-31.94%
PETRONET	254.69	251.60	28-Apr-26	-17.03%
INFY	1300.80	1292.10	28-Apr-26	-9.39%
DRREDDY	1217.30	1209.20	28-Apr-26	-9.34%
VOLTAS	1235.40	1227.30	28-Apr-26	-9.20%
NAUKRI	993.80	987.45	28-Apr-26	-8.97%
LUPIN	2274.50	2264.10	28-Apr-26	-6.42%
BAJAJ-AUTO	8758.50	8736.50	28-Apr-26	-3.53%
INDIGO	4193.50	4183.60	28-Apr-26	-3.31%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	42024710	44131945	0.95

(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. PERSISTENT	2. COFORGE	3. MPHASIS	4. TECHM	5. HCLTECH
6. TCS	7. LTIM	8. INFY	9. NTPC	10. BHEL

(Source: [Moneycontrol](#))

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