

Market Snapshot

KEY INDICES	10-Apr-26	02-Apr-26	05-Sep-25
S&P CNX NIFTY	24050.60	22713.10	5.89
SENSEX	77550.25	73319.55	5.77
NIFTY MIDCAP 100	57843.95	53677.05	7.76
NIFTY SMLCAP 100	16840.10	15650.50	7.60

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

Sectoral Snapshot

KEY INDICES	10-Apr-26	02-Apr-26	%Ch
NIFTY BANK	55912.75	51548.75	8.47
NIFTY AUTO	26640.90	24089.65	10.59
NIFTY FMCG	48194.05	46232.15	4.24
NIFTY IT	31030.60	30441.45	1.94
NIFTY METAL	12356.40	11456.60	7.85
NIFTY PHARMA	22164.85	21808.40	1.63
NIFTY REALTY	759.25	672.10	12.97
BSE CG	72180.77	64385.10	12.11
BSE CD	58203.23	52061.58	11.80
BSE Oil & GAS	26681.26	25073.03	6.41
BSE POWER	7286.60	6559.05	11.09

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

FII & DII Activities (Rs Crore)

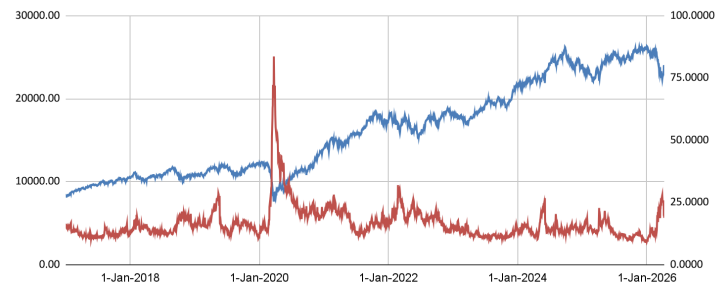
02/04/2026 to 10/04/2026

Activities	FIIs	DIIIs
Buy	107971.75	120680.99
Sell	156184.84	91870.26
Net	-48213.09	28810.73

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Markets end volatile week with strong gains amid global cues

Indian equity benchmarks ended the week on a strong note, driven by robust buying across sectors and supportive global cues. Sentiment remained buoyant amid optimism over a temporary US-Iran ceasefire, although lingering geopolitical uncertainties kept gains in check. The rally was further supported by a stable domestic macro environment and continued institutional participation. Broader market outperformed the frontline indices. During the week, volatility remained elevated due to sharp swings, including a mid-week surge followed by profit booking. Additionally, the RBI's policy stance, which balanced inflation concerns with growth support, along with updates on monsoon outlook and global developments, kept investors cautious even as markets trended higher.

In the week ended on Friday, 10 April 2026, the S&P BSE Sensex surged 4,230.7 points or 5.77% to settle at 77,550.25. The Nifty 50 index surged 1,337.5 points or 5.89% to settle at 24,050.60. The BSE 150 Mid-Cap index gained 7.25% to close at 15,623.78. The BSE 250 Small-Cap jumped 7.15% to end at 6,261.45.

Sensex Gainers - Weekly

SCRIPS	10-Apr-26	02-Apr-26	%Ch
TMPV	342.55	303.25	12.96
AXISBANK	1351.45	1198.15	12.79
BAJFINANCE	924.40	826.40	11.86
BAJAJFINSV	1808.60	1640.65	10.24
TITAN	4502.15	4097.75	9.87

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	10-Apr-26	02-Apr-26	%Ch
SUNPHARMA	1654.70	1694.65	-2.36
INFY	1292.35	1300.45	-0.62
TECHM	1440.40	1441.50	-0.08
RELIANCE	1350.15	1350.85	-0.05

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	10-Apr-26	02-Apr-26	%Ch
TMPV	342.60	303.30	12.96
AXISBANK	1350.80	1197.90	12.76
BAJAJ-AUTO	9813.50	8758.50	12.05
BAJFINANCE	924.55	826.85	11.82
EICHERMOT	7424.00	6649.50	11.65

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	10-Apr-26	02-Apr-26	%Ch
COALINDIA	434.10	449.35	-3.39
SUNPHARMA	1654.90	1693.60	-2.29
INFY	1292.50	1300.80	-0.64
ONGC	286.50	287.20	-0.24
TECHM	1440.20	1441.50	-0.09

(Source: Capitaline)

The RBI's Monetary Policy Committee (MPC), chaired by Governor Sanjay Malhotra, unanimously voted to maintain the repo rate under the liquidity adjustment facility (LAF) at 5.25%. Accordingly, the standing deposit facility (SDF) rate remains at 5.00%, while the marginal standing facility (MSF) rate and the Bank Rate continue at 5.50%.

The central bank flagged rising global risks, noting that the conflict in West Asia has disrupted supply chains, creating a challenging environment of higher prices and slower global growth. It added that monetary policy now faces a delicate balance between anchoring inflation and supporting growth.

On the domestic front, India's economy remained resilient in FY26, with real GDP growth revised higher to 7.6% YoY as per the Second Advance Estimates, compared to 7.4% projected earlier in the First Advance Estimates.

However, the RBI warned that elevated energy and commodity prices, along with potential disruptions in the Strait of Hormuz, could weigh on growth going forward. Real GDP growth for FY27 is pegged at 6.9%, with quarterly projections at 6.8% in Q1, 6.7% in Q2, 7.0% in Q3 and 7.2% in Q4.

Inflation risks have also firmed up. CPI inflation for FY27 is projected at 4.6%, up sharply from 2.1% earlier, with upside risks stemming from elevated energy prices and potential weather disruptions such as El Niño impacting the monsoon.

Short-Term Ceasefire in Middle East:

The US and Iran have reportedly entered a temporary two-week ceasefire arrangement, with Pakistan acting as mediator and Islamabad set to host follow-up talks. The deal appears to be conditional, with the Strait of Hormuz at the center of the discussions; reporting suggests Iran would allow shipping access under military coordination, while the US would pause offensive action. The media outlets

Nifty Midcap 100 Gainers - Weekly

SCRIPS	10-Apr-26	02-Apr-26	%Ch
ASHOKLEY	178.02	148.44	19.93
LTF	278.43	240.35	15.84
TTML	41.94	36.36	15.35
SHRIRAMFIN	1027.55	891.60	15.25
BANDHANBNK	168.07	146.34	14.85

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	10-Apr-26	02-Apr-26	%Ch
IPCALAB	1456.20	1488.30	-2.16
UBL	1454.20	1485.10	-2.08
ABBOTINDIA	25780.00	26285.00	-1.92
OIL	471.30	480.15	-1.84
BIOCON	348.60	352.55	-1.12

(Source: Capitaline)

World Markets

KEY INDICES	10-Apr-26	03-Apr-26	%Ch
DJIA	47916.57	46504.67	3.04
NASDAQ	22902.89	21879.18	4.68
BOVESPA	197323.88	188052.02	4.93
FTSE 100	10600.53	10436.29	1.57
CAC 40	8259.60	7962.39	3.73
DAX	23803.95	23168.08	2.74
MOEX RUSSIA	2725.39	2760.70	-1.28
NIKKEI 225	56924.11	53123.49	7.15
HANG SENG	25893.54	25116.53	3.09
STRAITS TIMES	4989.41	4947.50	0.85
SHANGHAI COMPOSITE	3986.22	3880.10	2.73
JAKARTA	7458.50	7026.78	6.14

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

describe the broader framework as a proposal under discussion rather than a concluded peace deal, and Iran's 10-point demands — including sanctions relief, nuclear recognition, and US troop withdrawal — remain unverified as agreed terms.

Monsoon Forecast:

Private weather forecaster Skymet expects India's 2026 monsoon to be below normal at around 94% of the long-period average, with El Nino likely to strengthen and disrupt rainfall in the second half of the season. While June could begin on a stable note, rains are expected to turn erratic from July to September, with central and north-west regions facing deficits, even as eastern and northeastern parts fare relatively better.

Economy:

India's seasonally adjusted HSBC India Services PMI Business Activity Index easing to 57.5 from 58.1 in February. The Composite PMI Output Index fell from 58.9 in February to 57.0.

The World Bank has raised India's growth forecast to 6.6% for the current financial year, up from 6.3%, citing strong domestic demand, resilient exports and recent free trade agreements. The report estimates India's growth accelerated to 7.6% in FY26 from 7.1% in FY25, supported by robust private consumption driven by low inflation and GST rationalisation.

While lower GST rates are expected to support demand in early FY27, elevated global energy prices may pressure household incomes. The World Bank said India will remain the key growth driver for South Asia, with the region's outlook largely anchored by its performance.

Outlook and Technical View

Global Markets:

The US economy grew at an annualized 0.5% in Q4 2025, revised down from earlier estimates, mainly due to weaker investment. Consumer spending slowed to 1.9%, while fixed investment rose modestly amid a sharp drop in structures. Exports fell 3.2%, and government spending declined sharply due to the shutdown, dragging growth. For full-year 2025, GDP expanded 2.1%.

Core PCE inflation increased 3% year-on-year in February, while headline inflation came in at 2.8%, according to Commerce Department data.

Germany's annual inflation rose to 2.7% in March 2026, up from 1.9% in February, marking the highest level since January 2024, mainly driven by a rebound in energy prices. Goods and services inflation also increased, while food inflation eased slightly. On a monthly basis, CPI rose 1.1%.

China, factory-gate prices rose for the first time in more than three years, while the consumer price index climbed 1% in March from a year earlier.

(Source: Capitaline)

US-Iran talks in Islamabad 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 23914, 23776, 23696, 23552 while levels of 24132, 24212, 24350, 24502 may act as resistance with pivot point at 23994.

(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	24110.00	22773.00	5.87%	59.40	743077	857176	-13.31%
BANKNIFTY	28-Apr-26	56105.60	51910.20	8.08%	192.85	138980	164814	-15.67%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	166.02	167.45	28-Apr-26	17.47%
HINDUNILVR	2155.30	2169.00	28-Apr-26	12.89%
GRASIM	2742.60	2757.90	28-Apr-26	11.31%
DABUR	435.70	438.05	28-Apr-26	10.94%
GODREJPROP	1716.50	1725.50	28-Apr-26	10.63%
EXIDEIND	324.50	326.10	28-Apr-26	10.00%
JSWSTEEL	1214.80	1220.40	28-Apr-26	9.35%
NATIONALUM	417.00	418.90	28-Apr-26	9.24%
BEL	442.45	444.45	28-Apr-26	9.17%
LICHSGFIN	531.65	534.05	28-Apr-26	9.15%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HCLTECH	1451.20	1417.30	28-Apr-26	-47.37%
WIPRO	204.88	201.91	28-Apr-26	-29.40%
JUBLFOOD	445.00	438.80	28-Apr-26	-28.25%
VOLTAS	1315.60	1306.90	28-Apr-26	-13.41%
MUTHOOTFIN	3573.90	3551.00	28-Apr-26	-12.99%
TCS	2524.30	2512.40	28-Apr-26	-9.56%
COALINDIA	434.10	432.60	28-Apr-26	-7.01%
PETRONET	270.74	270.28	28-Apr-26	-3.45%
INDIGO	4193.50	4183.60	28-Apr-26	-3.31%
ASHOKLEY	178.02	177.93	28-Apr-26	-1.03%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	48831835	47611070	1.03

(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. ABREL	2. LODHA	3. PHOENIXLTD	4. PRESTIGE	5. GODREJPROP
6. SOBHA	7. OBEROIRLTY	8. DLF	9. ANANTRAJ	10. BRIGADE

(Source: [Moneycontrol](#))

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