

Market Snapshot

KEY INDICES	17-Apr-26	10-Apr-26	05-Sep-25
S&P CNX NIFTY	24353.55	24050.60	1.26
SENSEX	78493.54	77550.25	1.22
NIFTY MIDCAP 100	59898.20	57843.95	3.55
NIFTY SMLCAP 100	17565.70	16840.10	4.31

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

Sectoral Snapshot

KEY INDICES	17-Apr-26	10-Apr-26	%Ch
NIFTY BANK	56565.70	55912.75	1.17
NIFTY AUTO	26435.00	26640.90	-0.77
NIFTY FMCG	49657.75	48194.05	3.04
NIFTY IT	31809.85	31030.60	2.51
NIFTY METAL	12880.00	12356.40	4.24
NIFTY PHARMA	22497.25	22164.85	1.50
NIFTY REALTY	786.90	759.25	3.64
BSE CG	76112.21	72180.77	5.45
BSE CD	60329.69	58203.23	3.65
BSE Oil & GAS	27144.84	26681.26	1.74
BSE POWER	7780.28	7286.60	6.78

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

FII & DII Activities (Rs Crore)

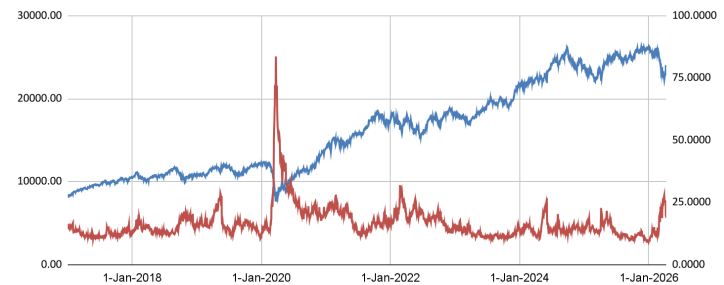
10/04/2026 to 17/04/2026

Activities	FIIs	DIIIs
Buy	88032.09	85146.13
Sell	85302.02	91021.99
Net	2730.07	-5875.86

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Indices extend gains for 2nd week; Nifty ends above 24,350 mark

The domestic equity indices ended the truncated week with significant gains, extending gains for the second consecutive week, supported by easing geopolitical tensions. Sentiment remained positive on expectations of a possible US-Iran peace agreement. Investors are expected to monitor Q4 earnings, sector-wise implications of the conflict, outlook commentary, and trade deficit trends. The IMF also marginally increased India's 2026 GDP growth forecast to 6.5%, supported by healthy domestic demand and carryover momentum. The Nifty ended above 24,350, while the Sensex settled above 78,500. The broader market outperformed the frontline indices.

In the week ended on Friday, 17 April 2026, the S&P BSE Sensex advanced 943.29 points or 1.22% to settle at 78,493.54. The Nifty 50 index jumped 302.95 points or 1.26% to settle at 24,353.55. The BSE 150 Mid-Cap index surged 3.25% to close at 16,131.51. The BSE 250 Small-Cap zoomed 4.55% to end at 6,546.28.

Sensex Gainers - Weekly

SCRIPS	17-Apr-26	10-Apr-26	%Ch
TMPV	360.15	342.55	5.14
POWERGRID	318.05	302.60	5.11
TECHM	1511.85	1440.40	4.96
ASIANPAINT	2463.40	2359.40	4.41
HINDUNILVR	2241.10	2155.60	3.97

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	17-Apr-26	10-Apr-26	%Ch
M&M	3199.35	3261.80	-1.91
MARUTI	13452.25	13710.95	-1.89
BAJFINANCE	908.70	924.40	-1.70
HDFCBANK	799.90	810.40	-1.30
BHARTIARTL	1846.55	1870.00	-1.25

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	17-Apr-26	10-Apr-26	%Ch
ADANI PORTS	1573.40	1475.30	6.65
TMPV	360.10	342.60	5.11
POWERGRID	318.10	302.75	5.07
TECHM	1511.40	1440.20	4.94
HINDALCO	1039.00	992.10	4.73

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	17-Apr-26	10-Apr-26	%Ch
HEROMOTOCO	5230.50	5466.50	-4.32
EICHERMOT	7189.50	7424.00	-3.16
MARUTI	13453.00	13709.00	-1.87
M&M	3200.20	3259.80	-1.83
BAJFINANCE	908.25	924.55	-1.76

(Source: Capitaline)

India's Consumer Price Index (CPI) inflation rose to 3.4% in March 2026 from 3.21% in February 2026. Food inflation was at 3.87%, picking up from the 3.47% in the previous month.

India's wholesale inflation rose to a 38-month high of 3.88% in March, up from 2.13% in February.

Trade deficit shrank to \$20.67 billion in March 2026, down from \$27.1 billion in February and \$21.69 billion a year earlier. Exports rose to \$38.92 billion, up from \$36.61 billion in February, while imports fell to \$59.59 billion, down from \$63.71 billion.

The International Monetary Fund (IMF) has marginally raised India's GDP growth forecast for 2026 to 6.5%, citing strong domestic demand and carryover momentum, while retaining the same growth estimate for 2027. However, the IMF cautioned that escalating geopolitical tensions, particularly in the Middle East, could weigh on global growth and push inflation higher in the near term. Globally, growth is projected at 3.1% in 2026 and 3.2% in 2027, with China expected to grow at 4.4% and the US at 2.3%, underscoring India's relatively stronger growth outlook.

Global Market:

China's finance ministry is expected to issue 15.5 billion yuan-denominated treasury bonds in Hong Kong on 22 April.

China's economy accelerated in the first quarter, supported by strong export growth that helped offset weak domestic demand, even as the outlook remains clouded by energy price risks linked to geopolitical tensions. Gross domestic product grew 5% in the January-March period, up from 4.5% in the previous quarter, according to official data.

Inflation in the Euro Area was revised higher to 2.6% in March 2026 from an earlier estimate of 2.5% and 1.9% in February, largely driven by a sharp increase in energy prices. Core inflation eased to 2.3%, with price pressures moderating across services, goods, and food. On a monthly

Nifty Midcap 100 Gainers - Weekly

SCRIPS	17-Apr-26	10-Apr-26	%Ch
HONAUT	32785.00	28585.00	14.69
ADANIPOWER	198.50	175.81	12.91
GUJARATGAS	362.80	323.65	12.10
BHEL	316.79	284.71	11.27
OFSS	7992.50	7253.50	10.19

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	17-Apr-26	10-Apr-26	%Ch
COROMANDEL	2050.20	2154.80	-4.85
INDIANB	939.45	967.75	-2.92
TVSMOTOR	3735.80	3839.90	-2.71
ASHOKLEY	174.78	178.02	-1.82
ASTRAL	1605.00	1630.00	-1.53

(Source: Capitaline)

World Markets

KEY INDICES	17-Apr-26	10-Apr-26	%Ch
DJIA	49447.43	47916.57	3.19
NASDAQ	24468.48	22902.89	6.84
BOVESPA	195733.52	197323.88	-0.81
FTSE 100	10667.63	10600.53	0.63
CAC 40	8425.13	8259.60	2.00
DAX	24702.24	23803.95	3.77
MOEX RUSSIA	2723.94	2725.39	-0.05
NIKKEI 225	58475.90	56924.11	2.73
HANG SENG	26160.33	25893.54	1.03
STRAITS TIMES	4997.93	4989.41	0.17
SHANGHAI COMPOSITE	4051.43	3986.22	1.64
JAKARTA	7634.00	7458.50	2.35

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

basis, consumer prices rose 1.3%, marking the fastest increase since October 2022, with broad-based inflation seen across major economies including Germany, France, Italy, and Spain.

UK economy expanded in February, followed a 0.1% expansion in January and was supported by broad-based gains.

US March CPI rose 0.9% month-on-month and 3.3% year-on-year, marking the highest annual increase since May 2024.

Meanwhile, the US Federal Reserve's Beige Book indicated that the economy grew at a slight to modest pace over the past six weeks. It highlighted the Iran conflict as a major source of uncertainty for businesses, even as price growth remained moderate despite rising energy costs. Consumers continued to face pressure from higher prices, with more households seeking financial assistance.

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 24176, 23998, 23900, 23752 while levels of 24452, 24550, 24728, 24852 may act as resistance with pivot point at 24274.

(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	24394.00	24110.00	1.18%	40.45	688067	743077	-7.40%
BANKNIFTY	28-Apr-26	56705.00	56105.60	1.07%	139.30	132002	138980	-5.02%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
MANAPPURAM	268.90	270.05	28-Apr-26	14.19%
NTPC	393.60	395.20	28-Apr-26	13.49%
HINDPETRO	370.85	372.35	28-Apr-26	13.42%
ICICIBANK	1346.80	1351.60	28-Apr-26	11.83%
RBLBANK	315.55	316.65	28-Apr-26	11.57%
CIPLA	1240.80	1245.10	28-Apr-26	11.50%
GAIL	157.82	158.33	28-Apr-26	10.72%
BANDHANBNK	174.47	175.02	28-Apr-26	10.46%
AXISBANK	1359.10	1363.30	28-Apr-26	10.25%
RECLTD	373.30	374.45	28-Apr-26	10.22%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HCLTECH	1442.30	1415.30	28-Apr-26	-62.12%
WIPRO	204.32	202.37	28-Apr-26	-31.67%
TCS	2581.50	2561.20	28-Apr-26	-26.09%
TECHM	1511.40	1503.10	28-Apr-26	-18.22%
DRREDDY	1235.70	1231.80	28-Apr-26	-10.47%
INDUSINDBK	853.90	852.35	28-Apr-26	-6.02%
POWERGRID	318.10	317.65	28-Apr-26	-4.69%
BHARATFORG	1860.50	1858.10	28-Apr-26	-4.28%
BAJAJ-AUTO	9773.50	9761.50	28-Apr-26	-4.07%
PAGEIND	37975.00	37930.00	28-Apr-26	-3.93%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	70288920	60700315	1.16

(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. SUZLON	2. RPOWER	3. THERMAX	4. ADANIPOWER	5. BHEL
6. JSWENERGY	7. NHPC	8. SIEMENS	9. ENRIN	10. TATAPOWER
11. TORNTPOWER	12. CGPOWER	13. HEROMOTOCO	14. EICHERMOT	

(Source: [Moneycontrol](#))

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