

## Market Snapshot

KEY INDICES	20-Mar-26	13-Mar-26	05-Sep-25
S&P CNX NIFTY	23114.50	23151.10	-0.16
SENSEX	74532.96	74563.92	-0.04
NIFTY MIDCAP 100	54855.50	54761.10	0.17
NIFTY SMLCAP 100	15718.60	15895.25	-1.11

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

## Sectoral Snapshot

KEY INDICES	20-Mar-26	13-Mar-26	%Ch
NIFTY BANK	53427.05	53757.85	-0.62
NIFTY AUTO	24715.90	24195.10	2.15
NIFTY FMCG	47007.55	47924.15	-1.91
NIFTY IT	29199.60	29071.25	0.44
NIFTY METAL	11412.75	11292.50	1.06
NIFTY PHARMA	22540.70	22832.20	-1.28
NIFTY REALTY	696.40	709.80	-1.89
BSE CG	67344.39	67620.20	-0.41
BSE CD	54751.36	55011.77	-0.47
BSE Oil & GAS	25977.38	26864.10	-3.30
BSE POWER	6923.81	6922.20	0.02

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

## FII & DII Activities (Rs Crore)

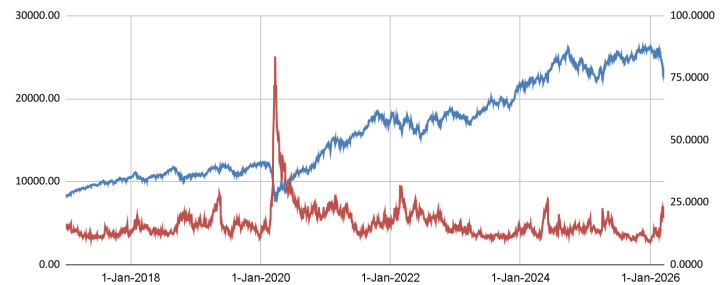
13/03/2026 to 20/03/2026

Activities	FIIs	DIIIs
Buy	76978.26	120591.39
Sell	119829.30	79972.07
Net	-42851.04	40619.32

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Benchmarks decline for 4th straight week

The key equity indices witnessed marginal losses during the week amid weak global cues, persistent selling pressure and volatility in crude oil prices. Investor sentiment remained cautious due to escalating geopolitical tensions in the Middle East and concerns over the global growth outlook.

The ongoing conflict in the region also overshadowed key domestic macroeconomic data, including trade deficit and wholesale inflation figures. Market participants also tracked policy signals from major central banks such as those of U.S, Switzerland, the UK, Japan and the Eurozone. The Nifty ended the week below the 23,150 mark.

In the week ended on Friday, 20 March 2026, the S&P BSE Sensex shed 30.96 points or 0.04% to settle at 74,532.96. The Nifty 50 index dropped 36.60 points or 0.16% to settle at 23,114.50. The BSE 150 Mid-Cap index rose 0.01% to close at 14,844.43. The BSE 250 Small-Cap fell 0.19% to end at 5,864.23.

India's merchandise trade deficit narrowed to \$27.1 billion in February from \$34.68 billion in January. Goods exports

## Sensex Gainers - Weekly

SCRIPS	20-Mar-26	13-Mar-26	%Ch
TATASTEEL	196.70	183.40	<b>7.25</b>
TECHM	1384.90	1331.95	<b>3.98</b>
M&M	3065.30	2951.20	<b>3.87</b>
ULTRACEMCO	10927.75	10607.00	<b>3.02</b>
RELIANCE	1414.55	1380.60	<b>2.46</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	20-Mar-26	13-Mar-26	%Ch
HDFCBANK	780.45	817.00	<b>-4.47</b>
HINDUNILVR	2083.90	2160.55	<b>-3.55</b>
WIPRO	191.05	197.55	<b>-3.29</b>
BAJFINANCE	830.40	855.05	<b>-2.88</b>
BAJAJFINSV	1709.75	1738.60	<b>-1.66</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	20-Mar-26	13-Mar-26	%Ch
TATASTEEL	196.77	183.51	<b>7.23</b>
M&M	3066.10	2931.10	<b>4.61</b>
JSWSTEEL	1169.60	1119.30	<b>4.49</b>
TECHM	1384.80	1332.80	<b>3.90</b>
ULTRACEMCO	10934.00	10616.00	<b>3.00</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	20-Mar-26	13-Mar-26	%Ch
BPCL	287.80	319.30	<b>-9.87</b>
IOC	144.60	156.54	<b>-7.63</b>
HDFCBANK	780.45	817.00	<b>-4.47</b>
CIPLA	1256.40	1314.70	<b>-4.43</b>
HINDALCO	874.25	910.05	<b>-3.93</b>

(Source: Capitaline)

edged up to \$36.61 billion in February from \$36.56 billion in January, while imports declined to \$63.71 billion from \$71.24 billion during the same period. However, on a year-on-year basis, the merchandise trade deficit widened sharply from \$14.42 billion in February last year.

Meanwhile, India's wholesale price index (WPI) inflation accelerated to 2.13% in February 2026 compared with 1.81% in January 2026, marking an 11-month high. Food inflation edged higher to 1.85% during the month from 1.41% in January. Inflation in the fuel and power segment turned positive at 1.17% in February against a contraction of 1.62% in the previous month.

### West Asia Conflict:

The Middle East conflict intensified as Iran stepped up retaliatory attacks following Israeli strikes on its leadership, targeting energy infrastructure in the UAE and key oil and gas facilities across the region. Rising tensions around the Strait of Hormuz heightened fears of supply disruptions, pushing global oil and gas prices higher. The situation worsened after reported strikes killed senior Iranian officials, with both sides issuing strong warnings, raising concerns of a prolonged conflict and its impact on global energy markets.

### Global Markets:

The People's Bank of China kept its key lending rates steady in March, with the one-year LPR at 3.0% and the five-year LPR at 3.5%.

On the data front, China's retail sales for the first two months of the year rose 2.8% YoY, beating expectations for a 2.5% increase but marking a slowdown from the 4% growth recorded in the January-February period of 2025.

China's Industrial output increased 6.3%, also surpassing forecasts for a 5% rise.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	20-Mar-26	13-Mar-26	%Ch
PAYTM	1054.30	976.20	<b>8.00</b>
TRIDENT	24.25	22.94	<b>5.71</b>
SUNTV	592.95	562.80	<b>5.36</b>
APOLLOTYRE	420.85	400.30	<b>5.13</b>
DELHIVERY	422.85	403.25	<b>4.86</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	20-Mar-26	13-Mar-26	%Ch
PETRONET	257.65	286.30	<b>-10.01</b>
BANDHANBNK	158.44	175.50	<b>-9.72</b>
HINDPETRO	336.30	368.75	<b>-8.80</b>
DEVYANI	104.17	111.94	<b>-6.94</b>
ZEEL	72.78	78.06	<b>-6.76</b>

(Source: Capitaline)

## World Markets

KEY INDICES	20-Mar-26	13-Mar-26	%Ch
DJIA	45577.47	46558.47	<b>-2.11</b>
NASDAQ	21647.61	22105.36	<b>-2.07</b>
BOVESPA	176219.41	177653.31	<b>-0.81</b>
FTSE 100	9918.33	10261.15	<b>-3.34</b>
CAC 40	7665.62	7911.53	<b>-3.11</b>
DAX	22380.19	23447.29	<b>-4.55</b>
MOEX RUSSIA	2864.89	2871.86	<b>-0.24</b>
NIKKEI 225	CLOSED	53819.61	-
HANG SENG	25277.32	25465.60	<b>-0.74</b>
STRAITS TIMES	4948.87	4842.27	<b>2.20</b>
SHANGHAI COMPOSITE	3957.05	4095.45	<b>-3.38</b>
JAKARTA	CLOSED	7137.21	-

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

The Bank of Japan kept the interest rates steady at 0.75% but noted that inflation risks now are tilted to the upside due to the Iran war.

The Reserve Bank of Australia (RBA) on Tuesday raised its cash rate by 25 basis points to 4.10% in a narrowly split 5-4 decision.

Bank of England kept its key rate unchanged at 3.75%.

The US Federal Reserve held its key policy rate steady at 3.5% to 3.75%, with Chair Jerome Powell watering down rate-cut expectations, saying that inflation was not coming down as much as 'hoped.'

The U.S. producer price index—which tracks the change in wholesale prices—rose 0.7% in February, well above the 0.3% that economists polled by Dow Jones had estimated.

(Source: Capitaline)

## 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 23007, 22898, 22729, 22502 while levels of 23284, 23454, 23562, 23702 may act as resistance with pivot point at 23176.

(Source: Capitaline)

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
<b>NIFTY</b>	30-Mar-26	23146.00	23228.40	<b>-0.35%</b>	<b>31.50</b>	686527	798585	<b>-14.03%</b>
<b>BANKNIFTY</b>	30-Mar-26	53755.00	53888.00	<b>-0.25%</b>	<b>304.00</b>	132770	150558	<b>-11.81%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>HDFCBANK</b>	780.45	783.35	30-Mar-26	<b>13.56%</b>
<b>JUBLFOOD</b>	451.55	453.05	30-Mar-26	<b>12.12%</b>
<b>ASHOKLEY</b>	168.89	169.44	30-Mar-26	<b>11.89%</b>
<b>PAGEIND</b>	32005.00	32105.00	30-Mar-26	<b>11.40%</b>
<b>TORNTPOWER</b>	1450.70	1455.20	30-Mar-26	<b>11.32%</b>
<b>BPCL</b>	287.80	288.65	30-Mar-26	<b>10.78%</b>
<b>IOC</b>	144.60	145.02	30-Mar-26	<b>10.60%</b>
<b>TORNTPHARM</b>	4270.20	4281.20	30-Mar-26	<b>9.40%</b>
<b>NAUKRI</b>	978.20	980.70	30-Mar-26	<b>9.33%</b>
<b>FEDERALBNK</b>	267.10	267.75	30-Mar-26	<b>8.88%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>VEDL</b>	672.20	664.30	30-Mar-26	<b>-42.90%</b>
<b>INFY</b>	1255.90	1246.80	30-Mar-26	<b>-26.45%</b>
<b>PFC</b>	412.85	409.95	30-Mar-26	<b>-25.64%</b>
<b>BAJAJ-AUTO</b>	9051.00	8995.00	30-Mar-26	<b>-22.58%</b>
<b>SHREECEM</b>	23535.00	23390.00	30-Mar-26	<b>-22.49%</b>
<b>MUTHOOTFIN</b>	3315.90	3298.00	30-Mar-26	<b>-19.70%</b>
<b>WIPRO</b>	190.90	189.92	30-Mar-26	<b>-18.74%</b>
<b>HCLTECH</b>	1333.70	1329.80	30-Mar-26	<b>-10.67%</b>
<b>PIDILITIND</b>	1341.30	1337.60	30-Mar-26	<b>-10.07%</b>
<b>TVSMOTOR</b>	3462.20	3454.80	30-Mar-26	<b>-7.80%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	74025110	68607350	<b>1.08</b>

(Source: Capitaline)

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

<b>1. UNOMINDA</b>	<b>2. M&amp;M</b>	<b>3. SONACOMS</b>	<b>4. TVSMOTOR</b>	<b>5. TUBEINVEST</b>
<b>6. EICHERMOT</b>	<b>7. PETRONET</b>	<b>8. BPCL</b>	<b>9. HINDPETRO</b>	<b>10. IOC</b>
<b>11. GAIL</b>				

(Source: [Moneycontrol](#))

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