

Market Snapshot

KEY INDICES	24-Apr-26	17-Apr-26	05-Sep-25
S&P CNX NIFTY	23897.95	24353.55	-1.87
SENSEX	76664.21	78493.54	-2.33
NIFTY MIDCAP 100	59374.80	59898.20	-0.87
NIFTY SMLCAP 100	17567.20	17565.70	0.01

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

Sectoral Snapshot

KEY INDICES	24-Apr-26	17-Apr-26	%Ch
NIFTY BANK	56089.75	56565.70	-0.84
NIFTY AUTO	25652.85	26435.00	-2.96
NIFTY FMCG	50766.25	49657.75	2.23
NIFTY IT	28530.60	31809.85	-10.31
NIFTY METAL	12746.65	12880.00	-1.04
NIFTY PHARMA	22580.10	22497.25	0.37
NIFTY REALTY	778.00	786.90	-1.13
BSE CG	77089.06	76112.21	1.28
BSE CD	59083.00	60329.69	-2.07
BSE Oil & GAS	27038.25	27144.84	-0.39
BSE POWER	8067.49	7780.28	3.69

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

FII & DII Activities (Rs Crore)

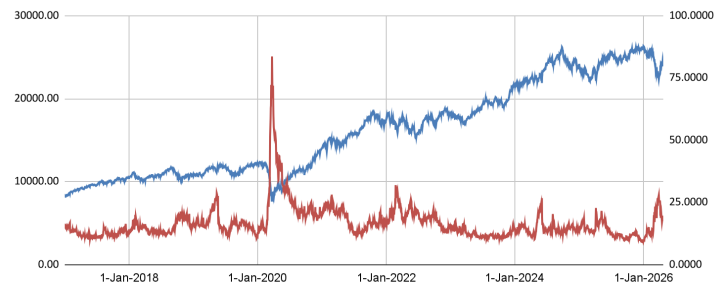
17/04/2026 to 24/04/2026

Activities	FIIs	DIIs
Buy	90168.81	113396.32
Sell	89095.57	108335.75
Net	1073.24	5060.57

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Benchmarks end with major losses; Nifty tumbles below 23,900 level

Indian equity benchmarks ended the week lower as crude oil prices surged nearly 8–10%, crossing the \$105 per barrel mark amid escalating geopolitical tensions in West Asia and concerns over supply disruptions. The rise in crude triggered worries over higher inflation, widening import bills, and pressure on India's fiscal balance. Sentiment was further impacted by signs of moderating domestic economic activity and weaker consumption trends. A downgrade in India's growth outlook by Moody's added to concerns over earnings growth prospects. Global uncertainty and a risk-off stance among foreign institutional investors led to sustained selling pressure, particularly in the latter part of the week. Overall, a combination of higher crude prices, macroeconomic concerns, and profit booking weighed on market sentiment.

In the week ended on Friday, 24 April 2025, the S&P BSE Sensex tanked 1,829.33 points or 2.33% to settle at 76,664.21. The Nifty 50 index slumped 455.6 points or 1.87% to settle at 23,897.95. The BSE 150 Mid-Cap index fell 0.58%

Sensex Gainers - Weekly

SCRIPS	24-Apr-26	17-Apr-26	%Ch
NESTLEIND	1421.05	1285.65	10.53
HINDUNILVR	2329.00	2241.10	3.92
NTPC	401.70	393.65	2.04
SBIN	1101.50	1080.35	1.96
BAJFINANCE	921.45	908.70	1.40

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	24-Apr-26	17-Apr-26	%Ch
HCLTECH	1203.25	1442.50	-16.59
INFY	1154.45	1318.60	-12.45
TECHM	1360.05	1511.85	-10.04
TCS	2397.30	2581.65	-7.14
M&M	3038.00	3199.35	-5.04

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	24-Apr-26	17-Apr-26	%Ch
NESTLEIND	1421.30	1285.60	10.56
DRREDDY	1317.10	1235.70	6.59
GAIL	165.61	157.82	4.94
CIPLA	1295.00	1240.80	4.37
COALINDIA	456.00	438.75	3.93

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	24-Apr-26	17-Apr-26	%Ch
HCLTECH	1203.20	1442.30	-16.58
INFY	1154.60	1318.70	-12.44
SBILIFE	1768.90	1970.90	-10.25
TECHM	1358.50	1511.40	-10.12
TCS	2396.90	2581.50	-7.15

(Source: Capitaline)

to close at 16,036.82 The BSE 250 Small-Cap index declined 0.21% to close at 6,532.53.

India's Index of Eight Core Industries (ICI) contracted 0.4% in March 2026 on a year-on-year basis, according to provisional data. The decline was driven by lower output in fertilisers, crude oil, coal and electricity, which dragged overall performance. For the full financial year 2025-26, core sector growth stood at 2.6% compared with the previous year.

The credit rating agency Moody has lowered India's FY27 GDP growth forecast to 6% from 6.8%. The downgrade reflects weak consumption, slower industrial output, and rising energy costs due to West Asia tensions. Higher oil and gas prices may increase import bills and push up inflation. India's dependence on Middle East energy and fertilizer imports adds to the risk. Elevated costs could hurt the margins of sectors like aviation, cement, and chemicals. The government may also face pressure on subsidies and fiscal balance. However, strong forex reserves, resilient services exports, and on-going infrastructure spending are expected to provide some support.

The HSBC Flash India PMI Composite Output Index rose to 58.3 in April from the final reading of 57.0 in March. The manufacturing PMI Output Index climbed to 59.1 in April 2026 compared with 55.7 in March 2026 while the services PMI Business Activity Index stood at 57.9 in April 2026 compared with 57.5 in March 2026.

Global Markets:

Germany's producer prices fell 0.2% year-on-year in March 2026, easing from a 3.3% decline in February and marking the mildest fall in a year. On a monthly basis, prices rose 2.5%, the sharpest increase since August 2022, driven by a 7.5% jump in energy costs.

In the UK, unemployment eased to 4.9% in the three months ended February, from 5.2% in January.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	24-Apr-26	17-Apr-26	%Ch
OFSS	8949.00	7992.50	11.97
DEEPAKNT	1690.30	1538.10	9.90
ZEEL	88.10	81.04	8.71
TORNTPOWER	1699.50	1565.00	8.59
AUBANK	1065.65	990.60	7.58

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	24-Apr-26	17-Apr-26	%Ch
PERSISTENT	4747.30	5446.50	-12.84
COFORGE	1150.90	1316.80	-12.60
MPHASIS	2175.80	2462.20	-11.63
TATAELXI	4193.00	4592.50	-8.70
SUNTV	600.15	643.25	-6.70

(Source: Capitaline)

World Markets

KEY INDICES	24-Apr-26	17-Apr-26	%Ch
DJIA	49230.71	49447.43	-0.44
NASDAQ	24836.60	24468.48	1.50
BOVESPA	190745.02	195733.52	-2.55
FTSE 100	10379.08	10667.63	-2.70
CAC 40	8157.82	8425.13	-3.17
DAX	24128.98	24702.24	-2.32
MOEX RUSSIA	2733.00	2723.94	0.33
NIKKEI 225	59716.18	58475.90	2.12
HANG SENG	25978.07	26160.33	-0.70
STRAITS TIMES	4922.86	4997.93	-1.50
SHANGHAI COMPOSITE	4079.90	4051.43	0.70
JAKARTA	7129.49	7634.00	-6.61

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

The UK's latest inflation print—its first since the Iran conflict began—showed prices accelerating to 3.3% in March from 3.0%, largely due to higher fuel costs, underscoring persistent price pressures. Government borrowing declined by nearly £20 billion to £132 billion for the financial year ended March 2026.

In Asia, Japan's manufacturing PMI rose to 54.9 in April from 51.6 in March, marking its fastest expansion in over two years. Core inflation, which excludes fresh food prices, increased to 1.8% in March from 1.6% in February, marking its first rise in five months amid higher energy costs.

South Korea's economy expanded 1.7% quarter-on-quarter in Q1 2026, beating estimates and posting its strongest growth since 2020.

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 23740, 23581, 23348, 23252 while levels of 24132, 24365, 24524, 24758 may act as resistance with pivot point at 23973.

(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	23935.00	24394.00	-1.88%	37.05	493074	688067	-28.34%
BANKNIFTY	28-Apr-26	56172.20	56705.00	-0.94%	82.45	82774	132002	-37.29%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
NAUKRI	984.95	989.55	28-Apr-26	42.62%
MUTHOOTFIN	3493.50	3507.90	28-Apr-26	37.61%
AUROPHARMA	1413.80	1419.40	28-Apr-26	36.14%
INDIGO	4523.10	4540.80	28-Apr-26	35.71%
INFY	1154.60	1159.10	28-Apr-26	35.56%
HAVELLS	1238.60	1243.20	28-Apr-26	33.89%
GRASIM	2739.30	2747.60	28-Apr-26	27.65%
TORNTPOWER	1699.50	1704.50	28-Apr-26	26.85%
TORNTPHARM	4117.20	4129.30	28-Apr-26	26.82%
PETRONET	273.45	274.21	28-Apr-26	25.36%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
DRREDDY	1317.10	1307.90	28-Apr-26	-63.74%
COLPAL	2171.30	2164.00	28-Apr-26	-30.68%
HINDALCO	1048.35	1045.70	28-Apr-26	-23.07%
SUNPHARMA	1620.40	1617.10	28-Apr-26	-18.58%
NTPC	401.85	401.05	28-Apr-26	-18.17%
MARICO	783.30	781.90	28-Apr-26	-16.31%
NESTLEIND	1421.30	1419.20	28-Apr-26	-13.48%
ICICIPRULI	514.20	513.45	28-Apr-26	-13.31%
GLENMARK	2299.50	2296.20	28-Apr-26	-13.10%
BANKBARODA	274.13	273.75	28-Apr-26	-12.65%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	222074585	283249205	0.78

(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. POWERINDIA	2. GV&TD	3. ADANIGREEN	4. TORNTPOWER	5. ADANIPOWER
6. BHEL	7. CGPOWER	8. ENRIN	9. ABB	10. HCLTECH
11. PERSISTENT	12. COFORGE	13. INFY	14. MPHASIS	15. TECHM
16. LTM	17. TCS			

(Source: [Moneycontrol](#))

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