

## Market Snapshot

KEY INDICES	27-Mar-26	20-Mar-26	05-Sep-25
S&P CNX NIFTY	22819.60	23114.50	-1.28
SENSEX	73583.22	74532.96	-1.27
NIFTY MIDCAP 100	54097.80	54855.50	-1.38
NIFTY SMLCAP 100	15620.00	15718.60	-0.63

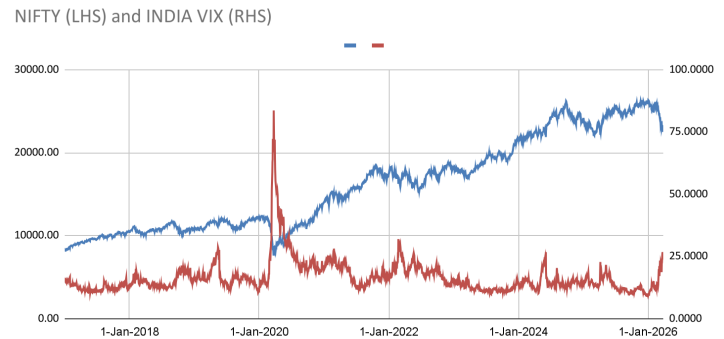
(Source: Capitaline, [Investing.com](https://www.investing.com))

## Sectoral Snapshot

KEY INDICES	27-Mar-26	20-Mar-26	%Ch
NIFTY BANK	52274.60	53427.05	-2.16
NIFTY AUTO	24351.95	24715.90	-1.47
NIFTY FMCG	46427.20	47007.55	-1.23
NIFTY IT	29541.65	29199.60	1.17
NIFTY METAL	11161.65	11412.75	-2.20
NIFTY PHARMA	22565.60	22540.70	0.11
NIFTY REALTY	670.15	696.40	-3.77
BSE CG	65702.59	67344.39	-2.44
BSE CD	53711.49	54751.36	-1.90
BSE Oil & GAS	25653.49	25977.38	-1.25
BSE POWER	6797.83	6923.81	-1.82

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

## Nifty Vs. INDIA VIX



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

## Nifty ends below 22,850 as rupee hits 94/\$ amid middle east tensions

Indian equity benchmarks ended the week lower, reflecting swings in global cues and heightened Middle East tensions. Early losses were driven by concerns over energy supply disruptions, a weakening rupee, which touched a record low of 94/\$, and a surge in market volatility, with the Nifty falling below 22,600.

Friday saw steep declines on weak global cues, ongoing geopolitical uncertainty, and renewed inflation concerns, with the Nifty closing below 22,850. The government's excise duty cuts on petrol (Rs 3/litre from Rs 13) and diesel (nil from Rs 10) provided partial relief, while auto shares retraced earlier gains amid cautious investor sentiment.

In the week ended on Friday, 27 March 2025, the S&P BSE Sensex tanked 949.74 points or 1.27% to settle at 73,583.22. The Nifty 50 index fell 294.9 points or 1.27% to settle at 22,819.60. The BSE 150 Mid-Cap index fell 2.18% to close at 14,648.91. The BSE 250 Small-Cap index declined 1.82% to close at 5,795.67.

## FII & DII Activities (Rs Crore)

20/03/2026 to 27/03/2026

Activities	FIIs	DII's
Buy	93874.66	130519.31
Sell	130470.72	97916.03
Net	-36596.06	32603.28

(Source: Capitaline)

## Sensex Gainers - Weekly

SCRIPS	27-Mar-26	20-Mar-26	%Ch
LT	3565.95	3434.80	<b>3.82</b>
HCLTECH	1363.70	1334.05	<b>2.22</b>
BAJFINANCE	844.35	830.40	<b>1.68</b>
INFY	1270.00	1254.60	<b>1.23</b>
ULTRACEMCO	11051.85	10927.75	<b>1.14</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	27-Mar-26	20-Mar-26	%Ch
RELIANCE	1348.25	1414.55	<b>-4.69</b>
SBIN	1020.05	1058.40	<b>-3.62</b>
TMPV	303.20	314.15	<b>-3.49</b>
INDUSINDBK	791.85	819.95	<b>-3.43</b>
HDFCBANK	756.25	780.45	<b>-3.10</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	27-Mar-26	20-Mar-26	%Ch
ONGC	281.95	265.40	<b>6.24</b>
LT	3564.10	3434.80	<b>3.76</b>
HCLTECH	1364.40	1333.70	<b>2.30</b>
BAJFINANCE	843.80	830.55	<b>1.60</b>
INFY	1269.70	1255.90	<b>1.10</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	27-Mar-26	20-Mar-26	%Ch
COLAINDIA	445.05	468.15	<b>-4.93</b>
UPL	595.85	625.55	<b>-4.75</b>
IOC	137.76	144.60	<b>-4.73</b>
RELIANCE	1348.10	1414.40	<b>-4.69</b>
GAIL	137.19	142.87	<b>-3.98</b>

(Source: Capitaline)

### US-Iran Warfare:

On the geopolitical front, sentiment remained fragile despite a temporary breather. GIFT Nifty rose over 3% after U.S. President Donald Trump announced a five-day pause on planned strikes targeting Iran's energy infrastructure, citing "productive" talks and signaling short-term de-escalation. The International Energy Agency noted nearly 40 energy assets had been severely damaged, heightening fears of a potential energy crisis.

Global investors remained cautious amid limited diplomatic progress. Reports indicated indirect exchanges between Iranian Foreign Minister Abbas Araghchi and U.S. envoy Steve Witkoff, though Tehran denied recent direct contact. Trump stated on Truth Social that he had instructed the Department of War to postpone strikes for five days, subject to continued engagement. Fatih Birol, IEA Executive Director, warned that damages to energy assets across nine Middle Eastern countries could trigger the worst energy crisis since the 1970s oil shocks.

The Trump administration reportedly proposed a 15-point ceasefire plan, while preparing to deploy at least 1,000 additional troops to a region already hosting around 50,000 personnel. Iran rejected the U.S. proposal, presenting its own conditions, including assurances against renewed military action and recognition of control over the Strait of Hormuz. The pause on strikes could extend into April, though conflicting reports suggested Tehran had not formally requested it. Uncertainty continued to weigh on investor sentiment.

### Economy:

The HSBC Flash India Composite Output Index fell to 56.5 from 58.9 in February.

S&P Global raised India's GDP growth forecast for FY27 to 7.1% from 6.7%. The ratings agency also revised medium-term growth projections, raising FY28 to 7.2% and FY29 to 7.0%, reflecting steady economic momentum.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	27-Mar-26	20-Mar-26	%Ch
<b>GLAND</b>	1724.10	1627.10	<b>5.96</b>
<b>OFSS</b>	6947.00	6580.00	<b>5.58</b>
<b>COFORGE</b>	1144.70	1089.30	<b>5.09</b>
<b>LICHSGFIN</b>	506.05	486.15	<b>4.09</b>
<b>PERSISTENT</b>	4899.80	4716.70	<b>3.88</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	27-Mar-26	20-Mar-26	%Ch
<b>GUJGASLTD</b>	317.65	354.60	<b>-10.42</b>
<b>TTML</b>	33.13	36.17	<b>-8.40</b>
<b>ESCORTS</b>	2842.40	3059.40	<b>-7.09</b>
<b>TORNTPOWER</b>	1352.30	1450.70	<b>-6.78</b>
<b>PRESTIGE</b>	1172.80	1248.20	<b>-6.04</b>

(Source: Capitaline)

## World Markets

KEY INDICES	27-Mar-26	20-Mar-26	%Ch
<b>DJIA</b>	45166.64	45577.47	<b>-0.90</b>
<b>NASDAQ</b>	20948.36	21647.61	<b>-3.23</b>
<b>BOVESPA</b>	181556.77	176219.41	<b>3.03</b>
<b>FTSE 100</b>	9967.35	9918.33	<b>0.49</b>
<b>CAC 40</b>	7701.95	7665.62	<b>0.47</b>
<b>DAX</b>	22300.75	22380.19	<b>-0.35</b>
<b>MOEX RUSSIA</b>	2789.61	2864.89	<b>-2.63</b>
<b>NIKKEI 225</b>	53373.07	CLOSED	-
<b>HANG SENG</b>	24951.88	25277.32	<b>-1.29</b>
<b>STRAITS TIMES</b>	4898.18	4948.87	<b>-1.02</b>
<b>SHANGHAI COMPOSITE</b>	3913.72	3957.05	<b>-1.10</b>
<b>JAKARTA</b>	7097.06	CLOSED	-

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

## Global Markets:

Euro zone business activity slowed in March, with the S&P Global Eurozone Composite PMI falling to 50.5 from 51.9 in February.

U.K. inflation held steady at 3.0% year-on-year in February, unchanged from January and in line with expectations, official data showed.

Japan's consumer price index eased to 1.3% in February, its lowest level since March 2022 and below the central bank's 2% target, down from 1.5% in January, according to government data.

China's industrial profits rose 15.2% year-on-year in the January-February period, extending a rebound from a 5.3% increase in December.

(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 22688, 22555, 22306, 22152 while levels of 23069, 23319, 23451, 23702 may act as resistance with pivot point at 22937.

(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. OFSS</b>	<b>2. COFORGE</b>	<b>3. PERSISTENT</b>	<b>4. HCLTECH</b>	<b>5. LODHA</b>
<b>6. ANANTRAJ</b>	<b>7. PRESTIGE</b>	<b>8. DLF</b>	<b>9. SOBHA</b>	<b>10. GODREJPROP</b>
<b>11. PHOENIXLTD</b>	<b>12. SIGNATURE</b>			

(Source: [Moneycontrol](#))

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : [helpdesk@shriraminsight.com](mailto:helpdesk@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |