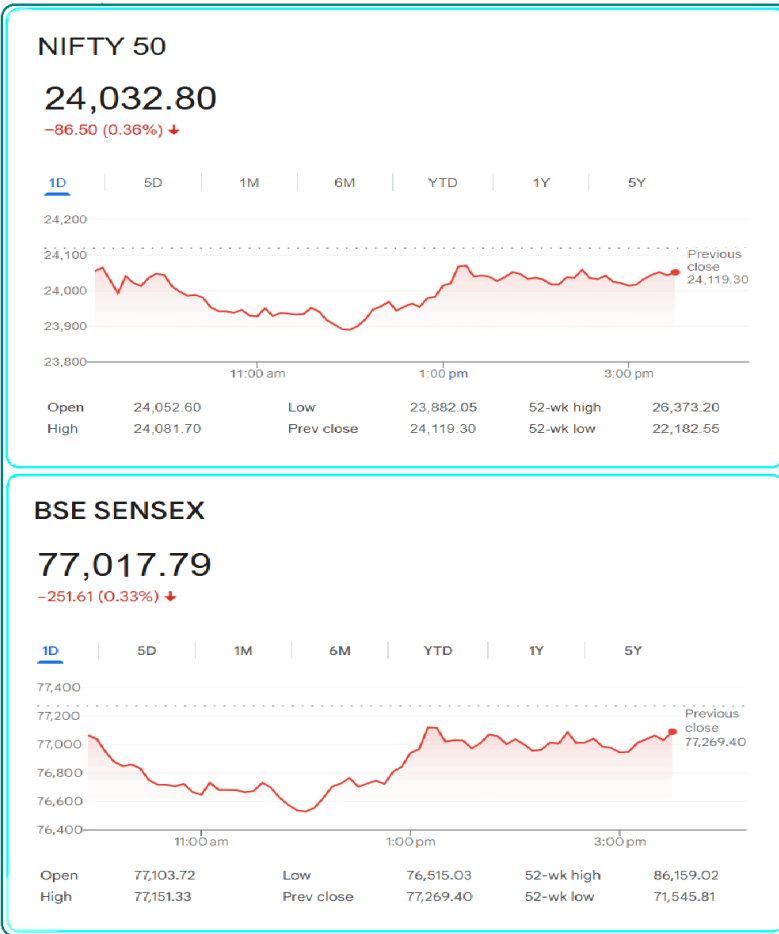


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24032.80	24119.30	<b>-0.36%</b>
<b>S&amp;P BSE SENSEX</b>	77017.79	77269.40	<b>-0.33%</b>
<b>NIFTY MID100</b>	60264.50	60159.75	<b>0.17%</b>
<b>NIFTY SML100</b>	18182.40	18132.50	<b>0.28%</b>

(Source: [NSE](#), [BSE](#))

## Market Wrap Up

- The key equity benchmarks ended with modest cut, as sentiment was hit by the rupee weakening to a record low of Rs 95.44 against the US dollar, while the weekly expiry of Nifty derivatives added to market volatility. Escalating US–Iran tensions further dampened investor confidence, erasing recent optimism following state election results and mirroring weakness in global markets. Ongoing quarterly earnings announcements also kept investors cautious. Going ahead, market participants will closely monitor crude oil prices, FII activity, and corporate results for further cues. The Nifty settled below the 24,050 mark.
- The S&P BSE Sensex declined 251.61 points or 0.33% to 77,017.79. The Nifty 50 index lost 86.50 points or 0.36% to 24,032.80. The BSE 150 MidCap Index rose 0.15% and the BSE 250 SmallCap Index added 0.20%. Among the sectoral indices, the Nifty FMCG index (up 0.64%), the Nifty Auto index (up 0.63%) and the Nifty Pharma index (up 0.40%) outperformed the Nifty 50 index. Meanwhile, the Nifty Realty index (down 1.41%), the Nifty Consumer Durables index (down 0.96%) and the Nifty Bank index (down 0.60%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **May** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **5834** contracts at the end of the day.
- Long** position build up for the **May** series has been witnessed in **INFY, WIPRO, LTM**.
- Short** position build up for the **May** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **May** series has been witnessed in **BHEL, ONGC**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54547.05	54878.50	-0.60%
NIFTY AUTO	26192.10	26027.70	0.63%
NIFTY FMCG	51593.55	51266.00	0.64%
NIFTY IT	29107.30	29076.10	0.11%
NIFTY METAL	12989.60	12972.70	0.13%
NIFTY PHARMA	23568.95	23475.55	0.40%
NIFTY REALTY	801.25	812.70	-1.41%
BSE CG	78403.69	78066.18	0.43%
BSE CD	58917.11	59285.38	-0.62%
BSE Oil & GAS	27601.00	27675.89	-0.27%
BSE POWER	8258.99	8218.14	0.50%

(Source: [NSE](#), [BSE](#))

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	59513.12	-
HANG SENG	25898.61	26095.88	-0.76%
STRAITS TIMES	4920.61	4924.31	-0.08%
SHANGHAI	CLOSED	CLOSED	-
KOSPI	CLOSED	6936.99	-
JAKARTA	7057.11	6971.95	1.22%
TAIWAN	40769.29	40705.14	0.16%
KLSE COMPOSITE	1747.43	1739.77	0.44%
ALL ORDINARIES	8903.30	8923.80	-0.23%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	128629.18	136831.09
NSE F&O	181101.37	196597.06

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3621.58

(Source: [NSE](#))

## Corporate News

- Larsen & Toubro's** Energy Hydrocarbon Onshore business has secured a large order from Bharat Coal Gasification and Chemicals (BCGCL), a joint venture of Coal India and Bharat Heavy Electricals (BHEL), for a coal-to-ammonium nitrate project in Odisha. The estimated contract value in the range of Rs 2,500 crore to Rs 5,000 crore.
- Mahindra and Mahindra** posted consolidated net sales at Rs 54,981.91 crore in March 2026 up 29.07% from Rs. 42,599.31 crore in March 2025. Net profit at Rs. 4,667.57 crore in March 2026 up 41.65% from Rs. 3,295.17 crore in March 2025.
- Marico** posted consolidated net sales at Rs 3,333.00 crore in March 2026 up 22.09% from Rs. 2,730.00 crore in March 2025. Net profit at Rs. 391.00 crore in March 2026 up 13.99% from Rs. 343.00 crore in March 2025.
- Raymond** posted consolidated net sales at Rs 602.91 crore in March 2026 up 8.15% from Rs. 557.46 crore in March 2025. Net profit at Rs. 1.13 crore in March 2026 down 99.15% from Rs. 132.76 crore in March 2025.
- KEI Industries** posted consolidated net sales at Rs 3,476.40 crore in March 2026 up 19.27% from Rs. 2,914.79 crore in March 2025. Net profit at Rs. 284.31 crore in March 2026 up 25.5% from Rs. 226.55 crore in March 2025.
- Tata Chemicals** posted consolidated net sales at Rs 3,438.00 crore in March 2026 down 2.02% from Rs. 3,509.00 crore in March 2025. Net loss at Rs. 2,132.00 crore in March 2026 down 3707.14% from Rs. 56.00 crore in March 2025.
- Tata Technologies** posted consolidated net sales at Rs 1,572.22 crore in March 2026 up 22.29% from Rs. 1,285.65 crore in March 2025. Net profit at Rs. 204.17 crore in March 2026 up 8.1% from Rs. 188.87 crore in March 2025.
- Quess Corp** posted consolidated net sales at Rs 3,892.45 crore in March 2026 up 6.46% from Rs. 3,656.42 crore in March 2025. Net profit at Rs. 64.14 crore in March 2026 up 167.16% from Rs. 95.49 crore in March 2025.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
M&M	3210.80	3106.50	3.36%
ULTRACEMCO	11963.00	11758.00	1.74%
NESTLEIND	1477.80	1457.10	1.42%
BAJAJFINSV	1794.60	1770.40	1.37%
HINDALCO	1054.70	1042.70	1.15%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	248.45	252.74	-1.70%
ICICIBANK	1251.30	1270.80	-1.53%
COALINDIA	472.60	479.95	-1.53%
ETERNAL	248.47	251.90	-1.36%
TECHM	1452.20	1471.60	-1.32%

(Source: [Moneycontrol](#))

- **Lupin** said that it has received approval from the US Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Glycerol Phenylbutyrate Oral Liquid, 1.1 g/mL.
- **Daryaganj Restaurants** has opened Daryaganj Gold in Aerocity, New Delhi. This new outlet offers an enhanced dining experience with a larger space and a special Gold menu. It also features Daryaganj's classic dishes. The brand plans to expand this premium format to other key cities. This launch marks a significant step for the restaurant chain.

- **Exide Industries** posted consolidated net sales at Rs 4,735.13 crore in March 2026 up 9.22% from Rs. 4,335.42 crore in March 2025. Net profit at Rs. 215.25 crore in March 2026 up 15.19% from Rs. 186.87 crore in March 2025.
- **Godrej Properties** posted consolidated net sales at Rs 3,458.13 crore in March 2026 up 62.99% from Rs. 2,121.73 crore in March 2025. Net profit at Rs. 649.88 crore in March 2026 up 70.13% from Rs. 381.99 crore in March 2025.
- **Ajanta Pharma** posted consolidated net profit rose 18.40% to Rs 266.70 crore in the quarter ended March 2026 as against Rs 225.26 crore during the previous quarter ended March 2025. Sales rose 21.47% to Rs 1421.64 crore in the quarter ended March 2026 as against Rs 1170.41 crore during the previous quarter ended March 2025.
- **GHCL** posted consolidated net profit declined 23.05% to Rs 115.64 crore in the quarter ended March 2026 as against Rs 150.27 crore during the previous quarter ended March 2025. Sales rose 1.16% to Rs 790.51 crore in the quarter ended March 2026 as against Rs 781.47 crore during the previous quarter ended March 2025.
- **JLR India** has announced significant price reductions of up to Rs 75 lakh on its UK-imported Range Rover SV and Range Rover Sport SV models. These price cuts, effective immediately, anticipate the India-UK Free Trade Agreement (FTA). The company aims to make its aspirational SV portfolio more accessible to clients, bolstering its growth in the Indian market.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

## Global News

- U.S. factory orders rose 1.5% month-over-month to \$630.4 billion in March 2026, following an upwardly revised 0.3% increase in February.
- The Reserve Bank of Australia raised its cash rate by 25bps to 4.35% at its April 2026 meeting.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

## Economic News

- Crude Oil traded at US\$ 102.98/bbl (IST 17:00).
- INR weakened to Rs. 95.29 from Rs. 95.09 against each US\$ resulting in daily change of 0.21%.
- India's coffee exports rose 26.6 per cent to 1.74 lakh tonne in the January-April period of 2026. The country had exported 1.37 lakh tonne of coffee in the year-ago period. In value terms, total exports rose to Rs 936.57 crore from Rs 757.07 crore a year ago, while unit value realisation edged higher to Rs 4,94,766 per tonne from Rs 4,75,023 per tonne.
- The Department for Promotion of Industry and Internal Trade (DPIIT) has streamlined Foreign Direct Investment (FDI) proposal processing with an updated Standard Operating Procedure (SOP). Decisions will now be made within 12 weeks, excluding applicant response times. The process is entirely paperless, with applications forwarded to the Ministry of External Affairs for border country investments.
- Indian pharmaceutical exports reached over \$31 billion in FY26. March saw a significant 23% drop, primarily due to a slowdown in the United States and China.
- India's real estate sector attracted record equity inflows of \$30.7 billion between 2024 and first quarter of 2026, an 88% increase over \$16.3 billion witnessed in 2022-2023.

(Source: [Economic Times](#), [Business Standard](#))

## Forthcoming Events

### Board Meetings as on 06/05/2026

Bajaj Auto Limited	Financial Results/Buyback/Dividend
Blue Star Limited	Financial Results/Dividend
CESC Limited	Financial Results
Firstsource Solutions Limited	Financial Results
Godrej Consumer Products Limited	Financial Results/Dividend
SHREE CEMENT LIMITED	Financial Results/Dividend
Kansai Nerolac Paints Limited	Financial Results/Dividend
KPIT Technologies Limited	Financial Results/Dividend
Hexaware Technologies Limited	Financial Results
Bharat Seats Limited	Financial Results/Dividend
Muthoot Microfin Limited	Financial Results/Fund Raising
Home First Finance Company India Limited	Financial Results/Dividend
BIRLASOFT LIMITED	Financial Results/Dividend
Aditya Birla Real Estate Limited	Financial Results/Dividend

Aptus Value Housing Finance India Limited	Financial Results/Dividend/Fund Raising
Arvind Fashions Limited	Financial Results/Dividend
Brigade Enterprises Limited	Financial Results/Dividend/Bonus
C & C Constructions Limited	Financial Results
CG Power and Industrial Solutions Limited	Financial Results
Garware Hi-Tech Films Limited	Financial Results/Dividend
Greaves Cotton Limited	Financial Results/Dividend
Meesho Limited	Financial Results
One 97 Communications Limited	Financial Results
PB Fintech Limited	Financial Results
Polycab India Limited	Financial Results/Dividend
Radico Khaitan Limited	Financial Results/Dividend
Rane (Madras) Limited	Financial Results/Dividend
Raymond Lifestyle Limited	Financial Results/Dividend
RSWM Limited	Financial Results
Satin Creditcare Network Limited	Fund Raising
Snowman Logistics Limited	Financial Results
Sula Vineyards Limited	Financial Results
The South Indian Bank Limited	Financial Results/Dividend

(Source: NSE)

### Board Meetings as on 06/05/2026

Odyssey Technologies Ltd	Dividend - Rs. 1.00 Per Share
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(Source: NSE)

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