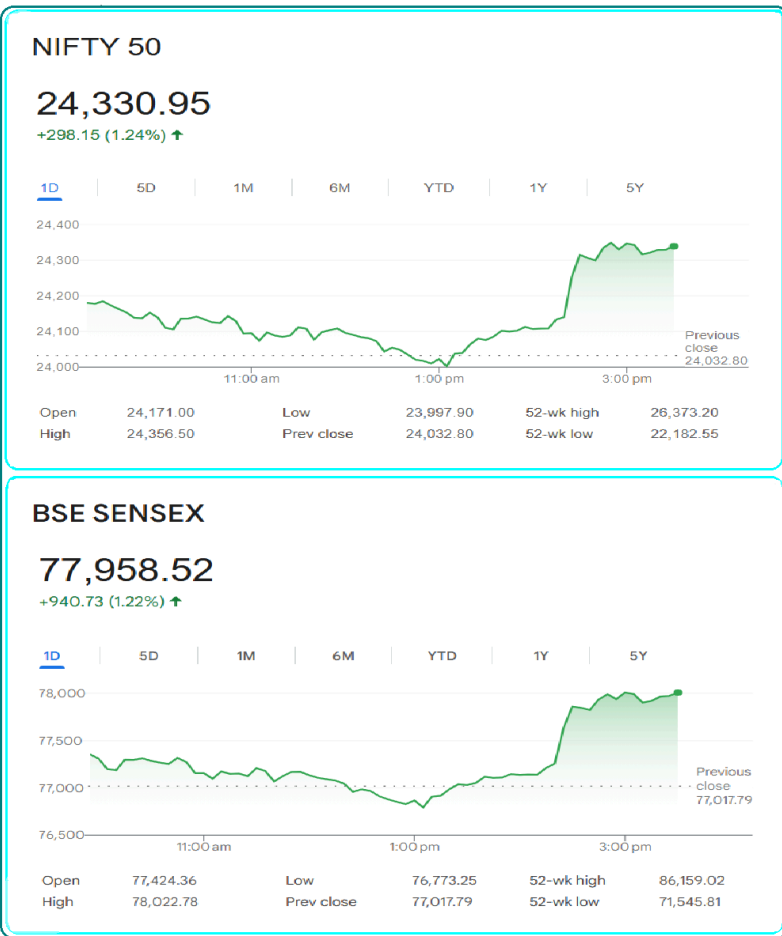


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24330.95	24032.80	1.24%
S&P BSE SENSEX	77958.52	77017.79	1.22%
NIFTY MID100	61326.70	60264.50	1.76%
NIFTY SML100	18534.10	18182.40	1.93%

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

Market Wrap Up

- The key equity benchmarks ended with major gains today, as investors remained optimistic over a potential US–Iran peace deal. Softer geopolitical tensions dragged Brent Crude prices below \$105, while the rupee strengthened to hover near the 94-per-dollar mark. However, investors remain focused on Q4 earnings for near-term cues. The Nifty ended above the 24,300 level.
- The S&P BSE Sensex surged 940.73 points or 1.22% to 77,958.52. The Nifty 50 index jumped 298.15 points or 1.24% to 24,330.95.
- The BSE 150 MidCap Index advanced 1.67% and the BSE 250 SmallCap Index rallied 1.77%.
- Among the sectoral indices, the Nifty PSU Bank index (up 2.84%), the Nifty Bank index (up 2.63%) and the Nifty Realty index (up 2.63%) outperformed the Nifty 50 index.
- Meanwhile the Nifty FMCG index (down 0.26%), the Nifty Oil & Gas index (up 0.17%) and the Nifty IT index (up 0.55%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **May** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **6372** contracts at the end of the day.
- **Long** position build up for the **May** series has been witnessed in **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**.
- **Short** position build up for the **May** series has been witnessed in **RELIANCE**, **LT**, **ONGC**, **INFY**.
- **Unwinding** position for the **May** series has been witnessed in **DELHIVERY**, **COLPAL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55981.05	54547.05	2.63%
NIFTY AUTO	26823.00	26192.10	2.41%
NIFTY FMCG	51460.55	51593.55	-0.26%
NIFTY IT	29267.95	29107.30	0.55%
NIFTY METAL	13129.55	12989.60	1.08%
NIFTY PHARMA	24110.30	23568.95	2.30%
NIFTY REALTY	822.30	801.25	2.63%
BSE CG	78706.03	78403.69	0.39%
BSE CD	59675.86	58917.11	1.29%
BSE Oil & GAS	27742.49	27601.00	0.51%
BSE POWER	8220.33	8258.99	-0.47%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	CLOSED	-
HANG SENG	26213.78	25898.61	1.22%
STRAITS TIMES	4927.38	4920.61	0.14%
SHANGHAI	4160.17	4112.16	1.17%
KOSPI	7384.56	6936.99	6.45%
JAKARTA	7092.47	7057.11	0.50%
TAIWAN	41138.85	40769.29	0.91%
KLSE COMPOSITE	1756.87	1747.43	0.54%
ALL ORDINARIES	9016.10	8903.30	1.27%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	151681.61	128629.18
NSE F&O	190578.87	181101.37

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	5834.90

(Source: [NSE](#))

Corporate News

- Larsen & Toubro** posted consolidated net sales at Rs 82,762.16 crore in March 2026 up 11.25% from Rs. 74,392.28 crore in March 2025. Net profit at Rs. 5,325.60 crore in March 2026 down 3.12% from Rs. 5,497.26 crore in March 2025.
- Hero MotoCorp** has reported 29.62% rise in standalone net profit to Rs 1,401.13 crore on a 28.75% increase in revenue from operations from Rs 12,796.53 crore in Q4 FY26 over Q4 FY25. The company has recommended a final dividend of 3,750% i.e. Rs 75 per share.
- Coforge** reported a 144.72% surge in consolidated net profit to Rs 612.3 crore on 5.17% jump in revenue from operations to Rs 4450.4 crore in Q4 FY26 over Q3 FY26.
- CG Power and Industrial Solutions** reported a 32% jump in consolidated net profit to Rs 362 crore on a 25.03% rise in revenue from operations to Rs 3,441.76 crore in Q4 FY26 over Q4 FY25.
- PTC India Financial Services** posted consolidated net sales at Rs 119.08 crore in March 2026 down 20.97% from Rs. 150.68 crore in March 2025. Net profit at Rs. 45.50 crore in March 2026 down 21.77% from Rs. 58.16 crore in March 2025.
- KPI Green Energy** posted consolidated net sales at Rs 795.81 crore in March 2026 up 39.76% from Rs. 569.41 crore in March 2025. Net profit at Rs. 145.29 crore in March 2026 up 46.55% from Rs. 99.14 crore in March 2025.
- Larsen & Toubro's** Minerals & Metals division secured its largest domestic metals order from JSW Steel, valued between Rs 10,000 crore and Rs 15,000 crore. This 'mega order' involves comprehensive engineering, procurement, and installation of critical process facilities for JSW Steel's expansion to over 50 MTPA by 2031, primarily at sites in Karnataka and Odisha.
- Tata Motors** has introduced new diesel versions of its Harrier and Safari SUVs. These models boast a large Harman infotainment system with Dolby Atmos. Advanced features like an integrated dashcam and memory ORVMs are included. The company also reported strong sales figures for April 2026. Passenger vehicle sales

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	4520.20	4238.40	6.65%
TMPV	358.15	340.15	5.29%
SHRIRAMFIN	1004.10	964.40	4.12%
TRENT	4289.80	4135.40	3.73%
ASIANPAINT	2519.00	2430.00	3.66%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ONGC	280.80	289.95	-3.16%
RELIANCE	1437.90	1463.60	-1.76%
LT	4008.50	4054.50	-1.13%
POWERGRID	315.95	319.45	-1.10%
NTPC	394.85	398.65	-0.95%

(Source: [Moneycontrol](#))

- **Bharat Electronics** said that it has signed a contract with the Ministry of Defence worth Rs 1,251 crore for the supply of the Ground Based Multi Sensor Electronic Support Measure (GBMES) system to the Indian Army.
- **KEC International** has secured new orders worth Rs 1,002 crore across various businesses, including transmission and distribution, renewable energy and transportation.
- **SPML Infra** announced that it has secured a landmark Rs 1,128 crore contract to develop a 1 GWh battery energy storage system (BESS) at NTPC Limited's Barauni Thermal Power Station in Bihar.

saw a substantial increase compared to the previous year.

- **Zydu Lifesciences** has made headlines as its Zydu Biologics injectable plant in Ahmedabad underwent a USFDA inspection between April 27 and May 5, 2026. The inspection yielded seven observations, but significantly, there were no issues regarding data integrity. Zydu Lifesciences is already in discussions with the USFDA to ensure these observations are addressed in a timely manner.
- **Punjab National Bank** is boosting its cybersecurity spending by over 50% this financial year. The bank is investing heavily in technology to protect against digital threats, including those posed by advanced AI. This move comes as regulators and banks assess preparedness for AI-related risks. PNB is also accelerating the purchase of security tools and has made its audit process continuous.
- **Sun Pharmaceutical Industries Ltd.** are weighing multiple financing options for its proposed \$12 billion acquisition of New York-listed healthcare company Organon & Co.
- **Caplin Point Laboratories's** subsidiary Caplin Steriles received final USFDA approval for its Abbreviated New Drug Application (ANDA) for Calcium Gluconate Injection USP (100 mg/mL in 10 mL, 50 mL and 100 mL vials).
- **B. L. Kashyap and Sons** said it has secured a civil and structural works contract worth Rs 180 crore from Immensity Office Parks.
- **South Indian Bank** has recommended a Final Dividend of Rs.0.45 per share.

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

Global News

- China RatingDog General Composite PMI rose to 53.1 in April 2026 from March's three-month low of 51.5. The services PMI increased to 52.6 in April 2026 from March's three-month low of 52.1.
- U.S. trade deficit widened to \$60.3 billion in March of 2026 from the revised \$57.8 billion gap in the previous month. Imports rose by \$8.7 billion, or 2.3% from the previous month to \$381 billion in the period while exports of foods rose \$1.1 billion amid an increase in soybean exports (+\$0.9 billion).
- U.S. new home sales rose 7.4% month-over-month to 682,000 in March 2026, exceeding expectations of 650,000 and up

from 635,000 in February.

- U.S. building permits fell 11.4% month-over-month to a seasonally adjusted annualized rate of 1.363 million in March 2026.
- U.S. S&P Global Composite PMI was revised down to 51.7 in April 2026 from a preliminary 52.0, yet still improved from March's 50.3. The services PMI rose to 51 in April of 2026 from the three-year low of 49.8 in the previous month.
- U.S. ISM Services PMI inched down to 53.6 in April of 2026 from 54 in the previous month.
- U.K. S&P Global Composite PMI rose to 52.6 in April of 2026 from 50.3 in the previous month. The services PMI was revised slightly higher to 52.7 in April 2026 from a flash estimate of 52, up from March's 11-month low of 50.5.
- Eurozone S&P Global Composite PMI fell to 48.8 in April of 2026 from 50.7 in the previous month. The services PMI was revised up slightly to 47.6 in April 2026 from 47.4, but still fell from 50.2 in March.
- Germany's S&P Global Composite PMI was revised slightly higher to 48.4 in April 2026 from a preliminary estimate of 48.3, down from 51.9 in March. The services PMI fell to 46.9 in April 2026, down from 50.9 in March.
- Eurozone producer prices rose 3.4% month-over-month in March 2026, reversing February's 0.6% decline. Year-over-year, producer prices climbed 2.1%, rebounding from February's 3.0% decline.
- France's S&P Global Composite PMI was unrevised at 47.6 in April 2026, down from 48.8 in March. The services PMI fell to 46.5 in April 2026 from 48.8 in March.
- France's industrial production rose 1% month-on-month in March 2026, rebounding from an upwardly revised 0.9% fall in the previous month.

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

Economic News

- Crude Oil traded at US\$ 90.34/bbl (IST 17:00).
- INR strengthened to Rs. 94.62 from Rs. 95.29 against each US\$ resulting in daily change of 0.70%.
- India's electric passenger vehicle sales grew by 75.14% to 23,506 units in April 2026, compared with 13,421 units in the same month last year. In the electric two-wheeler segment, FADA said total sales stood at 1,48,740 units last month, up from 92,538 units in April last year, reflecting a rise of 60.73%. FADA said electric three-wheeler sales stood at 64,549 units last month, as against 62,489 units in April 2025, reflecting a growth of 3.3%. Retail sales of electric commercial vehicles rose more than two-fold to 2,245 units last month, up from 902 units in April 2025, it added.
- Vehicle sales saw a significant 13% jump last month, reaching 2.61 million units.
- India's HSBC Composite PMI registered 58.2 in April 2026, just shy of the flash estimate of 58.3 but higher than 57.0 in the previous month. The services PMI was revised higher to 58.8 in April 2026 from the preliminary estimate of 57.9, following March's 13-month low of 57.5.

- India's goods and services exports rose 4.6% to an all-time high of USD 863.11 billion during 2025-26, up from USD 825.26 billion in 2024-25. Exports grew 0.93% to USD 441.78 billion in the last fiscal year from USD 437.70 billion in 2024-25.
- The government raised the minimum price payable to sugarcane farmers to Rs. 365 per quintal for the 2026-27 season from Rs. 355 the year ago at a basic recovery rate of 10.25%

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

Forthcoming Events

Board Meetings as on 07/05/2026

Britannia Industries Limited	Financial Results/Dividend
Pidilite Industries Limited	Financial Results/Dividend
Dabur India Limited	Financial Results/Dividend
Escorts Kubota Limited	Financial Results/Dividend
Lupin Limited	Financial Results/Dividend
MRF Limited	Financial Results/Dividend
Mahanagar Gas Limited	Financial Results/Dividend
Bharat Forge Limited	Financial Results/Dividend
Biocon Limited	Financial Results/Dividend/Fund Raising
BSE Limited	Financial Results/Dividend
Acme Solar Holdings Limited	Financial Results
Aditya Birla Lifestyle Brands Limited	Financial Results/Dividend
Apollo Pipes Limited	Financial Results/Dividend
Bajaj Holdings & Investment Limited	Financial Results/Dividend
Cartrade Tech Limited	Financial Results
Ceigall India Limited	Financial Results/Dividend
Coromandel International Limited	Financial Results/Dividend
Craftsman Automation Limited	Financial Results/Dividend
Gateway Distriparks Limited	Financial Results
Globus Spirits Limited	Financial Results/Dividend
Goa Carbon Limited	Financial Results/Dividend
Gravita India Limited	Financial Results
Harsha Engineers International Limited	Financial Results/Dividend/Fund Raising
Indraprastha Gas Limited	Financial Results/Dividend
Karur Vysya Bank Limited	Financial Results/Dividend
Manaksia Aluminium Company Limited	Financial Results/Dividend
NOCIL Limited	Financial Results/Dividend
NRB Bearing Limited	Financial Results/Dividend
Parag Milk Foods Limited	Financial Results/Dividend
R. S. Software (India) Limited	Financial Results

RattanIndia Power Limited	Financial Results
ROUTE MOBILE LIMITED	Financial Results/Dividend
Savita Oil Technologies Limited	Financial Results/Dividend
Shakti Pumps (India) Limited	Financial Results
Sirca Paints India Limited	Financial Results/Dividend
Sonata Software Limited	Financial Results/Dividend
Stylam Industries Limited	Financial Results
Sundrop Brands Limited	Financial Results
Suraj Limited	Financial Results
Suryoday Small Finance Bank Limited	Financial Results/Dividend/Fund Raising
Thermax Limited	Financial Results/Dividend
Thyrocare Technologies Limited	Financial Results/Dividend
Vesuvius India Limited	Financial Results/Dividend
Vijaya Diagnostic Centre Limited	Financial Results/Dividend
Vikram Solar Limited	Financial Results
V-Mart Retail Limited	Financial Results/Dividend
WESTLIFE FOODWORLD LIMITED	Financial Results
Wonderla Holidays Limited	Financial Results/Dividend

(Source: NSE)

Board Meetings as on 07/05/2026

Oracle Financial Services Software Limited	Interim Dividend - Rs 270 Per Share
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(Source: NSE)

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