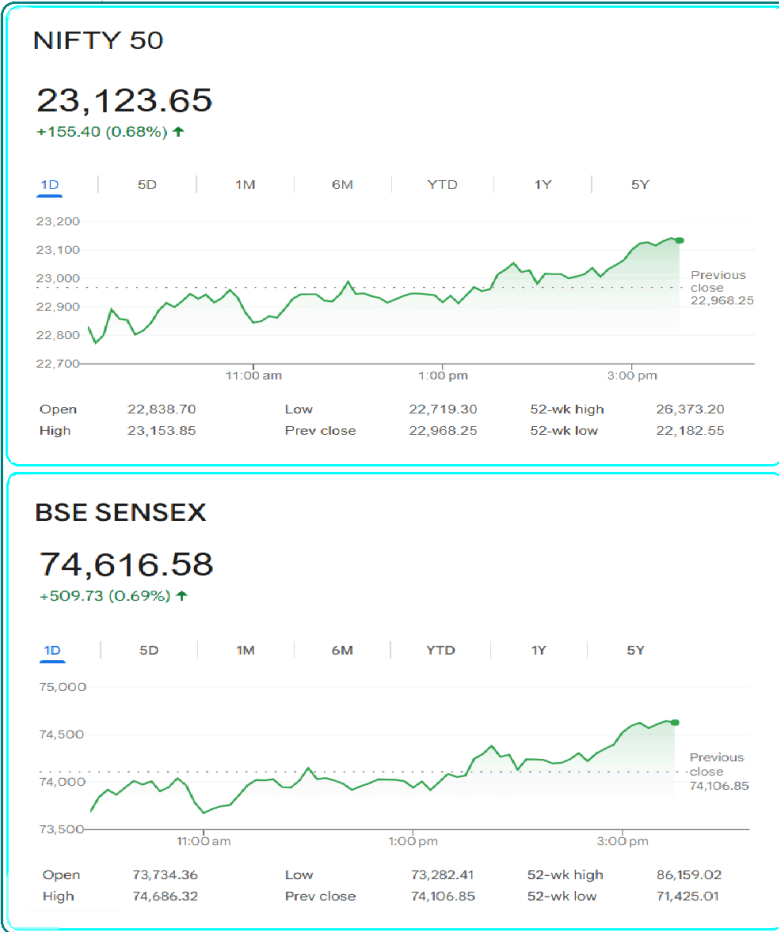


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23123.65	22968.25	0.68%
S&P BSE SENSEX	74616.58	74106.85	0.69%
NIFTY MID100	54600.55	54492.65	0.20%
NIFTY SML100	15843.30	15853.05	-0.06%

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

Market Wrap Up

- The key equity indices ended with strong gains, marking the fourth consecutive session of recovery. The Nifty opened sharply lower in early trade but staged a robust rebound in mid-afternoon, reversing losses to close firmly in the green. Market volatility remained elevated due to the weekly expiry of Nifty 50 derivative contracts. Investor sentiment stayed cautious amid escalating geopolitical tensions in West Asia and ahead of the deadline set by U.S. President Donald Trump regarding a potential agreement with Iran.
- The S&P BSE Sensex climbed 509.73 points or 0.69% to 74,616.58. The Nifty 50 index soared 155.40 points or 0.68% to 23,123.65. In four consecutive trading sessions, the Sensex surged 3.70% while the Nifty gained 3.54%. The BSE 150 MidCap index added 0.03% and the BSE 250 SmallCap index rose 0.16%.
- Among the sectoral indices, the Nifty IT index (up 2.50%), the Nifty Realty index (up 1.67%) and the Nifty Metal index (up 1.55%) outperformed the Nifty 50 index. Meanwhile, the Nifty PSU Bank index (down 0.71%), the Nifty Consumer Durables index (down 0.19%) and the Nifty Auto index (up 0.09%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **April** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **13522** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **BHARTIARTL, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **April** series has been witnessed in **LT, SBIN**.
- **Unwinding** position for the **April** series has been witnessed in **RELIANCE, ONGC**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	52716.25	52609.10	0.20%
NIFTY AUTO	24373.30	24350.40	0.09%
NIFTY FMCG	46980.10	46600.05	0.82%
NIFTY IT	31403.35	30636.55	2.50%
NIFTY METAL	11762.65	11583.50	1.55%
NIFTY PHARMA	21868.70	21835.35	0.15%
NIFTY REALTY	698.60	687.10	1.67%
BSE CG	67382.26	66948.90	0.65%
BSE CD	54451.17	54546.88	-0.18%
BSE Oil & GAS	25557.33	25389.67	0.66%
BSE POWER	6865.47	6838.91	0.39%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	53429.56	53413.68	0.03%
HANG SENG	CLOSED	CLOSED	-
STRAITS TIMES	4958.01	4972.40	-0.29%
SHANGHAI	3890.16	3880.10	0.26%
KOSPI	5494.78	5450.33	0.82%
JAKARTA	6971.03	6989.43	-0.26%
TAIWAN	33229.82	32572.43	2.02%
KLSE COMPOSITE	1676.86	1680.83	-0.24%
ALL ORDINARIES	8921.20	8774.90	1.67%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	110461.90	116115.39
NSE F&O	198801.66	202828.16

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	8692.11

(Source: [NSE](#))

Corporate News

- Tata Motors** has launched its new electric commercial vehicle, the Intra EV Pickup, priced at Rs 11.95 lakh. This expansion of their electric portfolio offers a payload of 1,750 kg and a range of 211 km, aiming to provide lower operating costs and a reduced environmental footprint for businesses.
- Bharti Airtel** has significantly expanded its 5G network in eastern Uttar Pradesh. Over the past year, more than 4,300 new 5G sites were deployed across 48 districts. This expansion covers 34 million people in urban centers, growing towns, and rural villages. The enhanced network ensures faster and reliable connectivity for work, education, and digital services for millions across the region.
- Tata Steel's** India crude steel production jumped 15% to 6.25 million tons in Q4 FY26, compared with 5.44 million tons in Q4 FY25. Deliveries stood at 6.19 million tons in Q4 FY26, up 10% compared with 5.60 million tons in Q4 FY25.
- Alembic Pharmaceuticals** has received final approval from the US Food & Drug Administration (USFDA) for its abbreviated new drug application (ANDA) for Dapagliflozin tablets in 5 mg and 10 mg strengths.
- Titagarh Rail Systems's** subsidiary, Titagarh Naval Systems, has received an in-principle approval from Ministry of Ports, Shipping and Waterways for its brownfield expansion project at Falta, West Bengal.
- Godrej Consumer Products** said its standalone business is expected to deliver double-digit underlying sales growth and high-single digit underlying volume growth in Q4 FY26.
- UCO Bank** announced strong financial results for the January-March quarter of FY26. The state-owned lender saw its credit grow by 19% to Rs 2.62 lakh crore. Total deposits also rose by 11%, reaching Rs 3.27 lakh crore. Low-cost CASA deposits saw an improvement. The bank's total business expanded by 15%.
- Emami Limited** is gearing up to take the reins of Axiom Ayurveda Private Limited in a strategic acquisition that underscores its ambition in the rapidly expanding health and wellness beverage industry. This deal, estimated at

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
WIPRO	204.72	197.29	3.77%
HINDALCO	954.50	927.45	2.92%
HCLTECH	1441.60	1403.30	2.73%
TCS	2539.80	2473.90	2.66%
INFY	1339.40	1306.20	2.54%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1196.10	1217.80	-1.78%
ADANIEN	1882.10	1902.20	-1.06%
INDIGO	4268.80	4312.50	-1.01%
APOLLOHOSP	7326.50	7373.00	-0.63%
M&M	3006.60	3021.60	-0.50%

(Source: [Moneycontrol](#))

about Rs. 200 crore, grants Emami total ownership of the sought-after AloFrut brand.

- **ACME Solar Holdings** announced that its wholly owned subsidiary, ACME Sun Power, has commissioned the fifth phase of its Battery Energy Storage System (BESS) project in Rajasthan on 6 April 2026.
- **Deep Industries** announced that it has secured an order worth Rs 59 crore from Oil and Natural Gas (ONGC) Corporation for hiring services of Natural Gas Compressor, Gas Dehydration & HC Dew Point Depression at Malleswaram, ONGC Rajahmundry Asset.
- **PDS** secured a strategic sourcing mandate worth around Rs 450 crore from a leading US-based value retailer, marking a key step in expanding its footprint in the US market.
- **Dynacons Systems & Solutions** has bagged a Rs 25 crore contract from Jammu & Kashmir Bank for the design, implementation, and support of a centralized, enterprise-wide Enterprise Resource Planning (ERP) platform.

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

Global News

- U.S. ISM said its services PMI slid to 54.0 in March after jumping to 56.1 in February.
- China's foreign exchange reserves fell by \$85.7 billion from the previous month to an equivalent of \$3.342 trillion in March of 2026.
- U.K. S&P Global Composite PMI was revised down sharply to 50.3 in March 2026, below both the preliminary estimate of 51 and February's 53.7. The services PMI was revised lower to 50.5 in March 2026 from a flash estimate of 51.2, down from February's 53.9.
- Eurozone S&P Global Composite PMI was revised up slightly to 50.7 in March 2026 (from a flash estimate of 50.5), but remained below February's 51.9. The services PMI eased to 50.2 in March 2026 from 51.9 in February and close to the preliminary 50.1 estimate.
- Eurozone Sentix investor confidence index plunged to -19.2 in April from -3.1 in March.
- Germany's S&P Global Composite PMI fell to 51.9 in March 2026, down from 53.2 in February. The services PMI was revised lower to 50.9 in March 2026 from a preliminary reading of 51.2, down from 53.5 in February.
- French S&P Global Composite PMI came in at 48.8 in March, revised higher from the preliminary 48.3 but down from 49.9

in February. The services PMI fell to 48.8 in March 2026, revised upward from the initial estimate of 48.3 but down from 49.6 in February.

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

Economic News

- Crude Oil traded at US\$ 115.48/bbl (IST 17:00).
- INR strengthened to Rs. 92.99 from Rs. 93.07 against each US\$ resulting in daily change of 0.09%.
- India's GDP growth projection for financial year 2026-27 has been revised downward from 7.7% to 7%, as per India outlook report by BMI, a Fitch Solutions unit. GDP growth in the previous financial year was also downwardly revised from the earlier estimate of 7.8% to 7.6%, amid slowing economic momentum and the ongoing conflict between Israel and Iran.
- Housing sales fell 4% annually in the January-March quarter to 84,827 units across eight major cities. Housing Sales stood at 88,361 units in the January-March period last year.
- India is set to launch sovereign credit guarantees for loans totaling \$26.7 billion. This initiative aims to bolster businesses, especially small ones, impacted by the Middle East crisis. The government will provide guarantees for four years, similar to measures taken during the COVID-19 pandemic. This move is expected to cost between 170 billion and 180 billion rupees.
- The Reserve Bank of India has confirmed that foreign investors can continue to invest up to six percent in government securities. This limit applies to the general route for the fiscal year 2026-27. State government securities and corporate bonds also have their investment limits unchanged. An additional limit of over Rs 3.30 lakh crore is set for 2026-27.
- The government has announced a new timeline for the rollout of a mandatory quality control directive regarding certain electrical appliances, now set to commence in October 2026. This directive affects a variety of common household gadgets.
- India is set to import 2.5 million metric tons of urea. This move aims to strengthen domestic fertilizer supplies. The state-run agency Indian Potash Ltd has issued a tender for the purchase. Shipments are expected by June 14. This is crucial for upcoming rice, corn, and soybean planting. India regularly imports fertilizers to meet its agricultural needs.
- ICICI Bank has revised India's projected GDP growth for the 2027 fiscal year to a range of 6.8-6.9% from a previous estimate of 7.2%.
- India's passenger vehicle industry growth is projected to moderate to 4-6% in FY27 after an estimated 7-9% rise in FY26, driven by a high base and evolving economic conditions. Utility vehicles dominate sales, with alternative powertrains aiding demand diversification. Tractor industry growth is also expected to slow to 1-4% in FY27 after a strong FY26.

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

Forthcoming Events

Board Meetings as on 08/04/2026

Muthoot Microfin Limited

Fund Raising

Corporate Actions as on 08/04/2026

Varun Beverages Ltd

Final Dividend - Rs. - 0.50 Per Share

(Source: NSE)

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