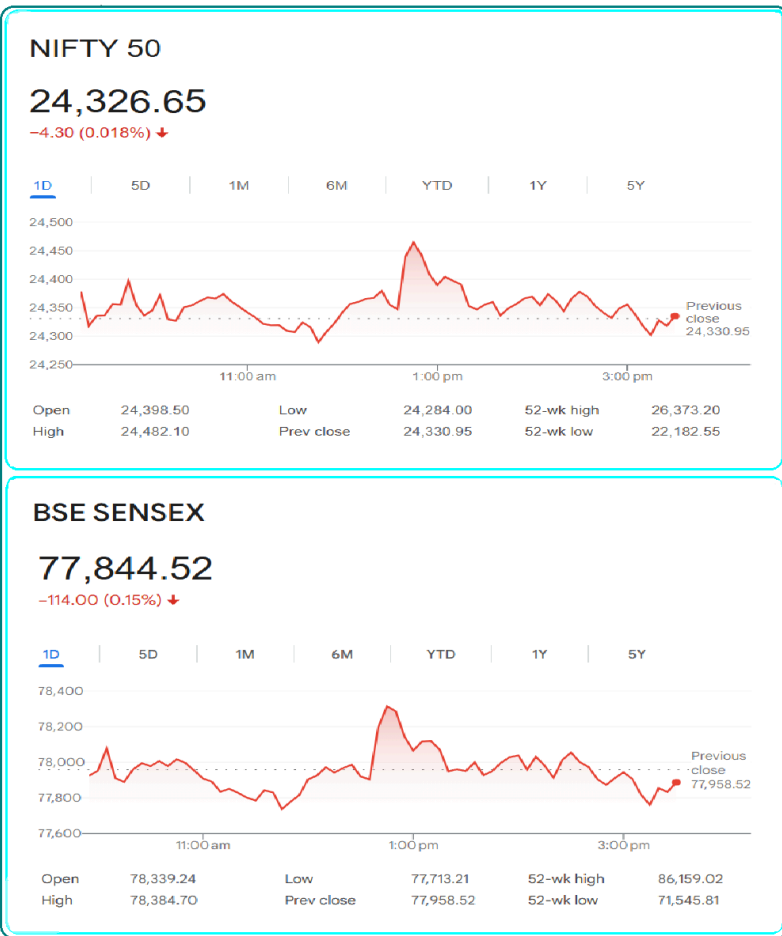


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24326.65	24330.95	<b>-0.02%</b>
<b>S&amp;P BSE SENSEX</b>	77844.52	77958.52	<b>-0.15%</b>
<b>NIFTY MID100</b>	62003.15	61326.70	<b>1.10%</b>
<b>NIFTY SML100</b>	18695.65	18534.10	<b>0.87%</b>

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

## Market Wrap Up

- The key equity benchmarks ended near the flatline with marginal losses, weighed down by volatility related to the weekly Sensex derivatives expiry. However, the broader market outperformed, supported by optimism over a potential US-Iran peace agreement and easing geopolitical tensions. Brent crude prices slipped below the \$100-per-barrel mark, while the rupee strengthened against the dollar, lending support to investor sentiment. Market participants also remained focused on ongoing Q4 earnings announcements for fresh directional cues. The Nifty settled below the 24,350 mark. The S&P BSE Sensex declined 114 points or 0.15% to 77,844.52. The Nifty 50 index shed 4.30 points or 0.02% to 24,326.65. The BSE 150 MidCap Index jumped 0.99% and the BSE 250 SmallCap Index surged 1.07%. Meanwhile, the Nifty Midcap 150 scaled a fresh intraday record high of 22,808.45 on the NSE. Among the sectoral indices, the Nifty Auto index (up 1.93%), the Nifty Realty index (up 0.63%) and the Nifty Private Bank index (up 0.30%) outperformed the Nifty 50 index. Meanwhile the Nifty Consumer Durables index (down 0.85%), the Nifty IT index (down 0.77%) and the Nifty FMCG index (down 0.76%) 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 **9352** contracts at the end of the day.
- Long** position build up for the **May** series has been witnessed in **LT, INFY**.
- Short** position build up for the **May** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **May** series has been witnessed in **BHEL, COFORGE**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56047.40	55981.05	0.12%
NIFTY AUTO	27339.95	26823.00	1.93%
NIFTY FMCG	51068.45	51460.55	-0.76%
NIFTY IT	29043.50	29267.95	-0.77%
NIFTY METAL	13165.40	13129.55	0.27%
NIFTY PHARMA	24135.50	24110.30	0.10%
NIFTY REALTY	827.50	822.30	0.63%
BSE CG	80320.92	78706.03	2.05%
BSE CD	59363.71	59675.86	-0.52%
BSE Oil & GAS	27699.24	27742.49	-0.16%
BSE POWER	8321.47	8220.33	1.23%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	62833.84	59513.12	5.58%
HANG SENG	26626.28	26213.78	1.57%
STRAITS TIMES	4941.96	4927.38	0.30%
SHANGHAI	4180.09	4160.17	0.48%
KOSPI	7490.05	7384.56	1.43%
JAKARTA	7174.32	7092.47	1.15%
TAIWAN	41933.78	41138.85	1.93%
KLSE COMPOSITE	1758.85	1756.87	0.11%
ALL ORDINARIES	9107.00	9016.10	1.01%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	153598.59	151681.61
NSE F&O	154331.91	190578.87

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	340.89

(Source: [NSE](#))

## Corporate News

- **Bajaj Auto** reported 34% jump in consolidated net profit to Rs 2,746.13 crore on 31.76% increase in revenue from operations to Rs 16,005.85 crore in Q4 FY26 over Q4 FY25.
- **Kansai Nerolac Paints** posted consolidated net profit jumped 3.51% to Rs 112.27 crore in Q4 FY26, compared with Rs 108.46 crore in Q4 FY25. Revenue from operations rose 7.54% to Rs 1,953.71 crore in Q4 FY26 as against Rs 1,816.65 crore posted in the same quarter last year.
- **Gateway Distriparks** posted consolidated net profit to Rs 60.59 crore in the quarter ended March 2026 as against net loss of Rs 193.10 crore during the previous quarter ended March 2025. Sales declined 0.24% to Rs 533.65 crore in the quarter ended March 2026 as against Rs 534.94 crore during the previous quarter ended March 2025.
- **Bharat Forge** reported a consolidated net profit of Rs 233.45 crore in Q4 FY26, down 17.4% from Rs 282.62 crore in Q4 FY25. Revenue from operations jumped 17.53% YoY to Rs 4,528.04 crore in the quarter ended 31 March 2026.
- **MRF** posted consolidated net profit surged 42.66% year-on-year (YoY) to Rs 700.68 crore in Q4 FY26, compared with the corresponding quarter of the previous fiscal year. Revenue from operations increased 13.70% YoY to Rs 8,044.22 crore during the quarter.
- **Brigade Enterprises** reported a 41.05% decline in consolidated net profit to Rs 145.49 crore in Q4 FY26 as against Rs 246.82 crore reported in Q4 FY25. Revenue from operations marginally declined 0.19% year-on-year to Rs 1,457.60 crore in the quarter ended 31 March 2026.
- **One 97 Communication** (Paytm) reported consolidated net profit of Rs 184 crore in Q4 FY26 compared with net loss of Rs 540 crore in Q4 FY25. Revenue from operations climbed 18.41% YoY to Rs 2,264 crore in Q4 March 2026.
- **Meesho** posted consolidated net loss narrowed to Rs 166.34 crore in Q4 FY26 compared with net loss of Rs 1,393.12 crore in Q4 FY25. Revenue from operations climbed 47.14% YoY to Rs 3,531.21 crore in Q4 FY26.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HDFCLIFE	625.40	606.35	<b>3.14%</b>
BAJAJ-AUTO	10605.00	10319.00	<b>2.77%</b>
M&M	3370.70	3300.80	<b>2.12%</b>
GRASIM	2960.60	2914.80	<b>1.57%</b>
NTPC	400.35	394.85	<b>1.39%</b>

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HINDUNILVR	2272.20	2317.10	<b>-1.94%</b>
TCS	2401.40	2435.40	<b>-1.40%</b>
TECHM	1448.20	1466.70	<b>-1.26%</b>
TITAN	4307.50	4359.60	<b>-1.20%</b>
ITC	307.40	310.70	<b>-1.06%</b>

(Source: [Moneycontrol](#))

- **Larsen & Toubro** said that the Buildings & Factories (B&F) business vertical of the company has won multiple 'large' orders from a valued real-estate client. The contract lies between Rs 2,500 crore to Rs 5,000 crore.

- The Reserve Bank of India has approved **Kotak Mahindra Bank's** increased stake in AU Small Finance Bank and Federal Bank. Kotak can now hold almost 9.99 percent in both lenders. This move allows Kotak to build significant minority stakes. The approvals were confirmed through regulatory filings. Markets showed a mild reaction to the development.
- **Tata Group** and **JSW Group** are investing close to \$1 billion. They are building local capabilities in electric vehicle and battery technologies. This move aims to reduce dependence on Chinese tech. Tata's Agratas is spending over \$400 million on battery research. JSW Motors plans to invest at least \$500 million in a research hub.
- **Emami** is set to acquire a significant 60% stake in IncNut Digital. This company is the driving force behind popular beauty brands Vedix and SkinKraft. The initial deal is valued at Rs 321 crore. Emami also plans to acquire the remaining stake in IncNut over the next four and a half years.

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

## Global News

- China's foreign exchange reserves rose by 68.4 billion dollars in the month of April to reach 3.411 trillion dollars.
- U.S. private businesses added a net 109,000 jobs in April 2026, the largest increase since January 2025.
- Eurozone retail sales volumes declined by 0.1% month-over-month in March 2026. Annually, retail trade growth slowed to 1.2% in March from 1.3%.
- Germany's factory orders surged 5.0% mom in March 2026, sharply accelerating from an upwardly revised 1.4% growth in the prior month.
- France's current account deficit narrowed to EUR 1.2 billion in March 2026 from a downwardly revised EUR 1.5 billion in the previous month.
- France's trade deficit widened to EUR 6.9 billion in March 2026 from a revised EUR 5.5 billion in February. Imports rose 3.2% month-on-month to EUR 59.3 billion while exports rose at a slower pace of 1.0% to EUR 52.5 billion.
- Australia unexpectedly posted a goods trade deficit of AUD 1.84 billion in March 2026, shifting from a downwardly revised

AUD 5.03 billion surplus in the previous month.

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

## Economic News

- Crude Oil traded at US\$ 91.89/bbl (IST 17:00).
- INR strengthened to Rs. 94.26 from Rs. 94.62 against each US\$ resulting in daily change of 0.38%.
- India's services exports hit a record \$421.3 billion in fiscal year 2026. This pushed total goods and services exports to an all-time high of \$863.1 billion. Services exports saw an 8.7% increase. Merchandise exports also grew, contributing significantly. This performance highlights India's strong export capabilities amidst global challenges. Each quarter of fiscal year 2026 achieved peak export levels.
- India's power ministry is planning a significant rs. 20,000 crore scheme for carbon capture technology. Cabinet approval is expected by July. This initiative aims to reduce emissions from crucial industries like power, steel, and cement. The scheme will support decarbonisation efforts and help balance energy needs with climate goals.
- India's economic growth faces challenges due to the Iran war. S&P Global Market Intelligence has lowered India's FY27 growth forecast. Geopolitical tensions are impacting fiscal space and capital expenditure. Infrastructure spending, a key growth driver, may be constrained. India's debt-to-GDP ratio is projected to rise. Despite these near-term risks, structural drivers like services, manufacturing, and AI support medium-term growth.

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

## Forthcoming Events

### Board Meetings as on 08/05/2026

State Bank of India	Financial Results/Dividend
Titan Company Limited	Financial Results/Dividend
Tata Consumer Products Ltd	Financial Results/Dividend
ABB India Limited	Financial Results
Hyundai Motor India Limited	Financial Results/Dividend
Bank of Baroda	Financial Results/Dividend/Fund Raising
Bank of India	Financial Results/Dividend
Bombay Dyeing & Mfg Company Limited	Financial Results/Dividend
CREDITACCESS GRAMEEN LIMITED	Financial Results
Grindwell Norton Limited	Financial Results/Dividend
Oberoi Realty Limited	Financial Results/Dividend/Fund Raising
Orient Electric Limited	Financial Results/Dividend

3i Infotech Limited	Financial Results
Amrutanjan Health Care Limited	Financial Results/Dividend
Bajaj Healthcare Limited	Financial Results/Dividend
Balkrishna Industries Limited	Financial Results/Dividend
Cera Sanitaryware Limited	Financial Results/Dividend
Cholamandalam Financial Holdings Limited	Financial Results/Dividend
Garware Technical Fibres Limited	Buyback
GNA Axles Limited	Financial Results/Dividend
Intellect Design Arena Limited	Financial Results/Dividend
IRM Energy Limited	Financial Results/Dividend
JSW Infrastructure Limited	Financial Results/Dividend
Kalyan Jewellers India Limited	Financial Results/Dividend
Muthoot Capital Services Limited	Financial Results
Niva Bupa Health Insurance Company Limited	Financial Results
Rain Industries Limited	Financial Results
Sasken Technologies Limited	Financial Results/Dividend
Shipping Corporation Of India Limited	Financial Results/Dividend
Shree Renuka Sugars Limited	Financial Results
Swiggy Limited	Financial Results
Tips Films Limited	Financial Results
Ujjivan Small Finance Bank Limited	Financial Results/Fund Raising
Urban Company Limited	Financial Results
Vedant Fashions Limited	Financial Results/Dividend

(Source: NSE)

### Board Meetings as on 08/05/2026

National Aluminium Company Limited	Interim Dividend - Rs 2 Per Share
Central Bank of India	Interim Dividend - Rs 0.60 Per Share
Ksb Limited	Dividend - Rs 4.40 Per Share
Laurus Labs Limited	Interim Dividend - Rs 1.20 Per Share
Omax Autos Limited	Interim Dividend - Rs 2.50 Per Share
Premier Energies Limited	Interim Dividend - Re 0.75 Per Share
Quess Corp Limited	Special Dividend - Rs 3 Per Share
Ramkrishna Forgings Limited	Interim Dividend - Re 1 Per Share
Somany Ceramics Limited	Interim Dividend - Rs 4 Per Share
Sundram Fasteners Limited	Interim Dividend - Rs 4.25 Per Share

(Source: NSE)

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