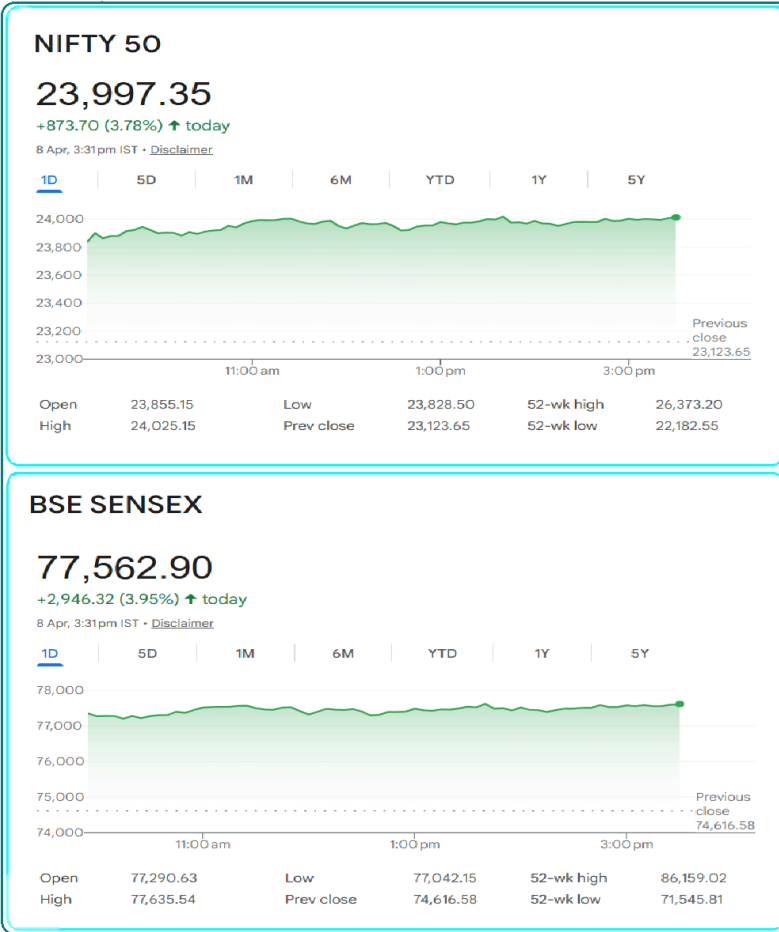


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23997.35	23123.65	3.78%
S&P BSE SENSEX	77562.90	74616.58	3.95%
NIFTY MID100	56799.50	54600.55	4.03%
NIFTY SML100	16538.05	15843.30	4.39%

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

Market Wrap Up

- The key equity indices ended with strong gains, extending their winning streak to five consecutive sessions. The rally was primarily driven by a sharp decline in oil prices following the ceasefire agreement between the US and Iran. Market sentiment was further boosted by a strengthening rupee, which added to the overall positive momentum. Additionally, investor confidence was supported by the RBI's Monetary Policy Committee (MPC) decision to keep the benchmark interest rate unchanged at 5.25% in its first policy meeting of the financial year 2026–27, under Governor Sanjay Malhotra. The S&P BSE Sensex climbed 2,946.32 points or 3.95% to 77,562.90. The Nifty 50 index soared 873.70 points or 3.78% to 23,997.35. In five consecutive trading sessions, the Sensex surged 7.80% while the Nifty soared 7.46%. The BSE 150 MidCap index added 3.97% and the BSE 250 SmallCap index rose 3.88%. Among the sectoral indices, the Nifty Auto index (up 6.69%), the Nifty Realty index (up 6.75%) and the Nifty Private Bank index (up 5.56%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (up 0.52%), the Nifty Pharma index (up 0.56%) and the Nifty Healthcare index (up 0.61%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **April** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **14815** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- **Short** position build up for the **April** series has been witnessed in **WIPRO**, **COALINDIA**.
- **Unwinding** position for the **April** series has been witnessed in **TMPV**, **BAJAJ-AUTO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55703.90	52716.25	5.67%
NIFTY AUTO	26002.95	24373.30	6.69%
NIFTY FMCG	47704.25	46980.10	1.54%
NIFTY IT	31565.80	31403.35	0.52%
NIFTY METAL	12078.95	11762.65	2.69%
NIFTY PHARMA	21991.20	21868.70	0.56%
NIFTY REALTY	745.75	698.60	6.75%
BSE CG	69442.42	67382.26	3.06%
BSE CD	57257.78	54451.17	5.15%
BSE Oil & GAS	26547.02	25557.33	3.87%
BSE POWER	7060.00	6865.47	2.83%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	56308.42	53429.56	5.39%
HANG SENG	25893.02	25116.53	3.09%
STRAITS TIMES	4996.05	4958.01	0.77%
SHANGHAI	3890.17	3890.16	0.00%
KOSPI	5872.34	5494.78	6.87%
JAKARTA	7279.21	6971.03	4.42%
TAIWAN	34761.38	33229.82	4.61%
KLSE COMPOSITE	1696.31	1676.86	1.16%
ALL ORDINARIES	9165.70	8921.20	2.74%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	165926.19	110461.90
NSE F&O	203442.07	198801.66

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2811.97

(Source: [NSE](#))

Corporate News

- MUFG Bank subscribed to 47.11 crore equity shares of **Shriram Finance** through a preferential issue at Rs 840.93 per share, taking the total investment to around Rs 39,618 crore. Post the allotment, MUFG will hold a 20% stake in the NBFC on a fully diluted basis.
- **Adani Group** commits Rs 33,081 crore to Odisha for three major infrastructure projects: a data center, a thermal power plant, and a cement manufacturing unit. These initiatives aim to boost digital infrastructure, ensure energy security, and support manufacturing, creating 9,700 jobs and aligning with the state's economic growth goals.
- **Adani group** said a US court allowed the group to move toward dismissal of a case filed by the U.S. Securities and Exchange Commission.
- **Dredging Corporation of India** signed a memorandum of understanding (MoU) with Colombo Dockyard PLC, marking a major milestone in strengthening maritime cooperation between India and Sri Lanka.
- **Gail (India)** has entered into a long-term charter party agreement with Alpha Gas, a leading Greek shipping major, for the LNG carrier "Energy Fidelity."
- **SML Mahindra's** commercial vehicles sales jumped 12.4% to 2,393 units in March 2026 compared with 2,129 units sold in March 2025. Production of commercial vehicles stood at 1,652 units in March 2026, registering the growth of 3.64% from 1,594 units produced in March 2025. However, exports declined sharply to 64 units in March 2026, down 65.59% from 186 units exported in March 2025.
- **Bank of Baroda** has introduced bob SAMVAD, an AI-driven platform. This new system allows customers and bank staff to communicate in their preferred languages. It translates conversations in real-time across 22 Indian languages. This innovation aims to break down language barriers at bank branches. Customers can speak or type their queries.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	1023.20	930.65	9.94%
ADANIEN	2043.80	1882.10	8.59%
TMPV	334.75	308.70	8.44%
INDIGO	4615.50	4268.80	8.12%
EICHERMOT	7131.00	6605.50	7.96%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	449.25	463.00	-2.97%
TECHM	1451.40	1473.40	-1.49%
NESTLEIND	1213.70	1222.80	-0.74%
WIPRO	203.42	204.72	-0.64%
ONGC	285.50	286.65	-0.40%

(Source: [Moneycontrol](#))

- **Zydus Lifesciences** received final approval from the United States Food and Drug Administration (USFDA) for Dapagliflozin tablets, 5 mg and 10 mg.
- **Aurobindo Pharma** has secured final approval from the US Food and Drug Administration (USFDA) to manufacture and market Dapagliflozin and Metformin Hydrochloride extended-release tablets for the treatment of type-2 diabetes.
- **Biocon's** subsidiary Biocon Pharma announced the receipt of U.S. Food and Drug Administration (US FDA) approval for Dapagliflozin Tablets.
- **Biocon** is significantly scaling up its adoption of artificial intelligence across its operations, from R&D to manufacturing and procurement. This strategic investment aims to achieve substantial cost savings, accelerate drug development timelines, and enhance its competitive edge in the global market.
- **Max Healthcare** announced that it has entered into a share purchase agreement for acquiring a controlling stake in Kalinga Hospital (KHL) from Hospital Corporation of Orissa Inc.
- **HFCL's** subsidiary, HTL, secured orders worth approximately Rs 1,366 crore from a Tier-1 customer for the supply of optical fiber cables (OFC).
- **Ola Electric** has developed its new LFP cell, the '46100' format, a bigger and more cost-efficient offering. It will be used in Ola products starting next quarter. This is being seen as a significant step towards making electric mobility more affordable and accessible in India. Ola's Gigafactory is also scaling up its manufacturing capabilities.
- **Royal Orchid Hotels** announced a strategic partnership with Hilton to develop 125 Hampton by Hilton hotels across India.

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

Global News

- U.S. durable goods orders fell by 1.4% from the previous month to \$315.5 billion in February of 2026, extending the revised 0.5% drop in the previous month. Core durable goods orders inched higher by 0.8%
- U.S. private employers added an average of 26,000 jobs per week in the four weeks ending March 21, 2026.
- U.S. total consumer credit rose by \$9.48 billion in February 2026, following a downwardly revised \$7.67 billion gain in January.
- Eurozone producer prices declined 0.7% month-over-month in February 2026, the biggest drop since April 2025, following a 0.8% rise in January. Year-on-year, producer prices declined 3%, the most since October 2024, after a 2% fall in each of the previous two months.

- Eurozone retail sales edged down 0.2% month-on-month in February 2026, following stagnation in January. Year-over-year, retail trade growth eased to 1.7% in February, down from 2.1% in January.
- Germany's factory orders rose 0.9% mom in February 2026, rebounding from an 11.1% slump in the prior month.
- France's trade deficit widened to EUR 5.8 billion in February 2026 from an upwardly revised eur 2.0 billion in February. Exports fell 0.9% month-on-month to EUR 51.0 billion while imports increased 5.0% to EUR 58.5 billion.
- France posted a current account deficit of EUR 1.8 billion in February 2026, reversing from an eighteen-month high and upwardly revised EUR 2.3 billion surplus in the previous month.
- Japan's current account surplus stood at JPY 3,932.7 billion in February 2026, little changed from JPY 3,938.4 billion a year earlier.

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

Economic News

- Crude Oil traded at US\$ 93.63/bbl (IST 17:00).
- INR strengthened to Rs. 92.59 from Rs. 92.99 against each US\$ resulting in daily change of 0.43%.
- The announcement of a ceasefire between the US and Iran, along with the reopening of the Strait of Hormuz, will provide immediate relief to exporters by easing shipping disruptions, FIEO said.
- The Reserve Bank of India (RBI) left its key repo rate unchanged at 5.25%. Cash Reserve Ratio remained unchanged at 3 percent in April while the Reverse Repo Rate remained unchanged at 3.35 percent in March.
- India's electric vehicle sales skyrocketed to 24.52 lakh units, a noteworthy increase of 24.6%. The two-wheeler segment alone accounted for over 14 lakh units, electric passenger vehicle retail sales missed the 2 lakh units by a whisker but surged 83.63% in FY26. In the electric PV category, total sales were at 1,99,923 units in FY26 as compared to 1,08,873 units in FY25, a growth of 83.63%. The electric two-wheeler category saw a growth of 21.81% at 14,01,818 units in FY26, up from 11,50,790 units in FY25. The electric three-wheeler category witnessed a growth of 18.97% at 8,30,819 units in FY26 as compared to 6,98,914 units in FY25. Electric commercial vehicle sales zoomed 120.57% at 19,454 units in FY26 as compared to 8820 units in FY25.
- India has boosted natural gas allocation to urea plants to 90% of average consumption, up from 70-75%, as supply improves following Middle East crisis disruptions. This decision, based on inventory and scheduled LNG arrivals, aims to support the upcoming monsoon planting season.
- Coal requirement for domestic coal-based power plants is projected to rise 11.5% to 233 million tonnes in the April-June quarter, driven by higher electricity generation. For the full fiscal year, coal demand is estimated at 906 million tonnes, compared with the actual requirement of 826 million tonnes in FY26.

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

Forthcoming Events

Board Meetings as on 09/04/2026

Tata Consultancy Services Limited	Financial Results/Dividend
Anand Rathi Wealth Limited	Financial Results/Bonus/Dividend
GM Breweries Limited	Financial Results/Dividend
Rajputana Stainless Limited	Financial Results
RSWM Limited	Fund Raising

Corporate Actions as on 09/04/2026

Automobile Products of India Ltd

(Source: NSE)

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