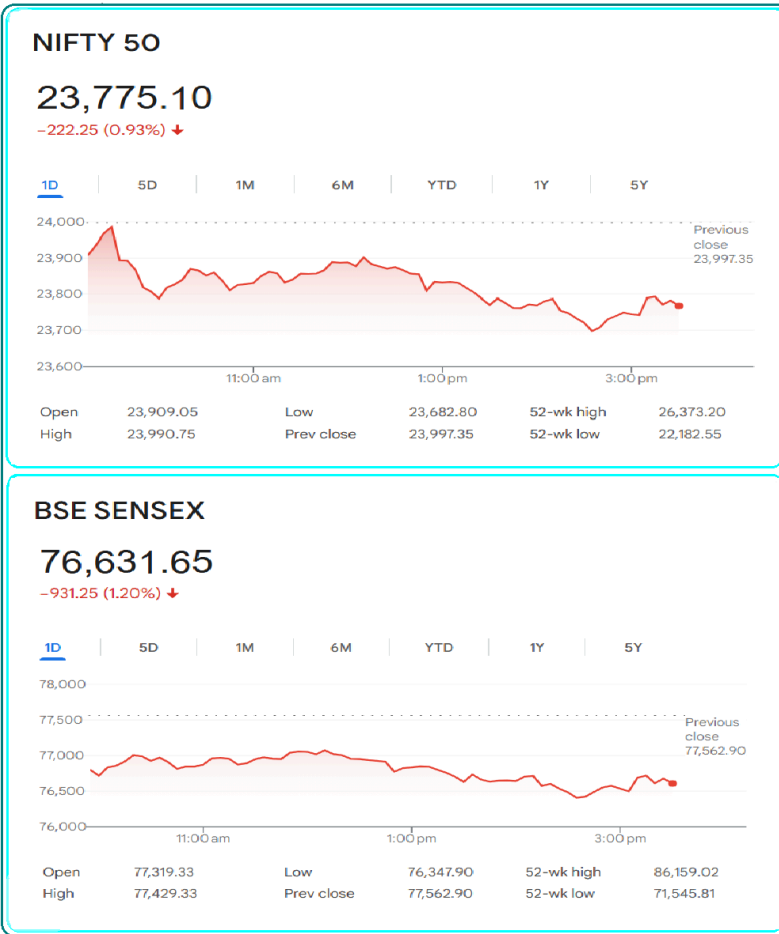


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23775.10	23997.35	-0.93%
S&P BSE SENSEX	76631.65	77562.90	-1.20%
NIFTY MID100	56978.75	56799.50	0.32%
NIFTY SML100	16566.00	16538.05	0.17%

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

Market Wrap Up

- The key equity benchmarks ended with major losses, snapping a five-day winning streak as investor sentiment turned cautious. The decline was largely attributed to lingering uncertainty around the US-Iran ceasefire, which kept market participants on edge. Adding to the subdued mood, investors remained on the sidelines ahead of TCS's quarterly earnings, looking for directional cues for the IT sector. Volatility also spiked due to the weekly expiry of Sensex derivatives contracts, further weighing on market momentum. The Nifty closed below the 23,800 mark. The S&P BSE Sensex tumbled 931.25 points or 1.20% to 76,631.65. The Nifty 50 index dropped 222.25 points or 0.93% to 23,775.10. In the past five consecutive trading sessions, the Sensex surged 7.80% while the Nifty soared 7.46%. The BSE 150 MidCap index added 0.09% and the BSE 250 SmallCap index rose 0.25%. Among the sectoral indices, the Nifty Metal index (up 1.25%), the Nifty Healthcare bank index (up 0.71%) and the Nifty Pharma index (up 0.66%) outperformed the Nifty 50 index. Meanwhile the Nifty Private Bank index (down 1.75%), the Nifty Financial Services index (down 1.41%) and the Nifty PSU Bank index (down 1.27%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **April** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **107** contracts at the end of the day.
- Long** position build up for the **April** series has been witnessed in **BHARTIARTL, TCS, HCLTECH**.
- Short** position build up for the **April** series has been witnessed in **RELIANCE, LT, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **April** series has been witnessed in **TATAELXSI, SHRIRAMFIN**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54821.70	55703.90	-1.58%
NIFTY AUTO	25901.90	26002.95	-0.39%
NIFTY FMCG	47640.70	47704.25	-0.13%
NIFTY IT	31636.20	31565.80	0.22%
NIFTY METAL	12229.70	12078.95	1.25%
NIFTY PHARMA	22135.40	21991.20	0.66%
NIFTY REALTY	743.75	745.75	-0.27%
BSE CG	70578.51	69442.42	1.64%
BSE CD	56951.69	57257.78	-0.53%
BSE Oil & GAS	26460.52	26547.02	-0.33%
BSE POWER	7149.48	7060.00	1.27%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	55895.32	56308.42	-0.73%
HANG SENG	25752.40	25893.02	-0.54%
STRAITS TIMES	4977.08	4996.05	-0.38%
SHANGHAI	3966.17	3995.00	-0.72%
KOSPI	5778.01	5872.34	-1.61%
JAKARTA	7307.59	7279.21	0.39%
TAIWAN	34861.16	34761.38	0.29%
KLSE COMPOSITE	1686.24	1696.31	-0.59%
ALL ORDINARIES	9168.90	9165.70	0.03%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	133363.65	165926.19
NSE F&O	151127.76	203442.07

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1711.19

(Source: [NSE](#))

Corporate News

- Tata Consultancy Services** posted a Q4 FY26 consolidated net profit of Rs 13,718 crore, a jump of nearly 29% from the previous quarter. Revenue from operations rose 5.4% quarter-on-quarter to Rs 70,698 crore. The company's board has proposed a final dividend of Rs 31 per share.
- Bharat Heavy Electricals** has signed a technology collaboration agreement (TCA) for excitation system for synchronous machines with Korea-based E2S Company.
- Tata Motors** is boosting its global presence after a successful FY26 and business split. The company is integrating its passenger car division with Jaguar Land Rover to find new efficiencies. Strong domestic sales in passenger and commercial vehicles are driving this growth. Tata Motors is also looking at acquiring Iveco to become a top global commercial vehicle maker.
- Dilip Buildcon** said it has been declared the lowest (L1) bidder for a Rs 268 crore project in Gujarat, tendered by the Narmada Water Resources, Water Supply, and Kalpasar Department.
- Anand Rathi Wealth** posted consolidated net profit jumped 40.9% to Rs 103.08 crore on 29.67% increase in revenue from operations to Rs 287.81 crore in Q4 FY26 over Q4 FY25. The company has approved bonus issue in ratio of 1:1.
- GM Breweries** reported a 10.57% decline in standalone net profit of Rs 54.07 crore in Q4 FY26, compared to Rs 60.46 crore posted in Q4 FY25. Revenue jumped 19.49% YoY to Rs 202.33 crore for the quarter ended 31 March 2026.
- Bosch** signed share purchase agreement to acquire 100% stake in Bosch Chassis Systems India for total consideration not exceeding Rs 9,068.68 crore.
- KEC International** secured multiple new orders worth Rs 2,518 crore across its civil, transportation, transmission & distribution (T&D), and cables & conductors businesses.
- NHPC** said that Cabinet Committee on Economic Affairs (CCEA) has approved an investment of Rs 26,069.50 Crore for the construction of Kamala Hydro Electric Project

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	985.65	951.80	3.56%
DRREDDY	1211.90	1191.40	1.72%
BAJAJ-AUTO	9517.00	9366.00	1.61%
BEL	439.75	433.10	1.54%
MAXHEALTH	954.95	941.15	1.47%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	4449.10	4615.50	-3.61%
JIOFIN	238.84	246.86	-3.25%
LT	3896.20	4005.90	-2.74%
SHRIRAMFIN	996.30	1023.20	-2.63%
ETERNAL	237.89	243.62	-2.35%

(Source: [Moneycontrol](#))

- Adani Renewable Energy Middle East (AGEL UAE), a wholly-owned subsidiary of **Adani Green Energy**, has signed a joint venture agreement with Minerva Holding RSC (Minerva), for Minerva Renewables Holding RSC (JVCo) on 08 April 2026.
- HBL Engineering** said that it has received Rs 83.81 crore contract from Patiala Loco Works (PLW), Punjab.

Global News

- Germany's trade surplus narrowed to EUR 19.8 billion in February 2026, down from a downwardly revised EUR 20.3 billion in January. Exports rose 3.6% mom to a three-year high of EUR 135.2 billion in February, following a downwardly revised 1.5% drop in January while imports surged 4.7% mom to EUR 115.4 billion, reversing a downwardly revised 5.1% decline in January.
- Germany's industrial output declined 0.3% mom in February 2026, reversing an upwardly revised flat reading in the previous month. On an annual basis, production was flat, following a 0.9% contraction in January.
- Germany's imports jumped 4.7% month-on-month to EUR 115.4 billion in February 2026, reversing a downwardly revised 5.1% decline in the previous month. On an annual basis, total imports grew 0.6% in February.

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

(HEP) in Kamle, Kra Daadi & Kurung Kumey, Arunachal Pradesh.

- NTPC** announced that it has signed a non-binding memorandum of understanding (MoU) with Électricité de France (EDF) to explore cooperation in developing new nuclear power projects in India.
- Lupin** said that it has received approval from the US Food and Drug Administration (USFDA) for its abbreviated new drug application for Dapagliflozin and Metformin Hydrochloride extended-release tablets in the United States.
- Glenmark Pharmaceuticals** said it has received final USFDA approval for its Progesterone Vaginal Inserts, 100 mg, deemed bioequivalent and therapeutically equivalent to Endometrin Vaginal Inserts, 100 mg of Ferring Pharmaceuticals.
- Bondada Engineering** has successfully commissioned solar power projects aggregating to 48.2 MWp during March 2026. These projects have been executed for reputed clients including Paradigm IT and MAHAGENCO across multiple locations in Maharashtra.

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

Economic News

- Crude Oil traded at US\$ 99.57/bbl (IST 17:00).
- INR weakened to Rs. 92.67 from Rs. 92.59 against each US\$ resulting in daily change of 0.09%.
- The Reserve Bank of India is proposing to remove due diligence requirements for MSMEs to join TReDS platforms. This move aims to simplify business operations for micro, small, and medium enterprises. TReDS facilitates financing of trade receivables through a digital network.
- India is pressing Tehran to expedite movement of India-bound oil and gas cargoes so they can be quickly turned around and redeployed to take advantage of the two-week ceasefire window to rebuild fuel stocks.
- The Aayog, in the report titled 'From Borrowers to Builders: Women and India's Evolving Credit Market', said that between December 2017 and December 2025, the number of credit-active women borrowers registered a compounded annual growth rate (CAGR) of 9%, while credit penetration among them increased from 19% to 36%.
- Indian fuel retailers are purchasing diesel from refiners at discounted rates to cushion consumers from potential price hikes, an industry source said. The revised pricing mechanism is now linked to India's crude import costs.

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

Forthcoming Events

Board Meetings as on 09/04/2026

Muthoot Finance Limited	Dividend
Pennar Industries Limited	Fund Raising
Almondz Global Securities Limited	Fund Raising

Corporate Actions as on 09/04/2026

R M Drip and Sprinklers Systems Limited	Bonus 5:7
Jash Engineering Limited	Interim Dividend - Re 0.60 Per Share

(Source: NSE)

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