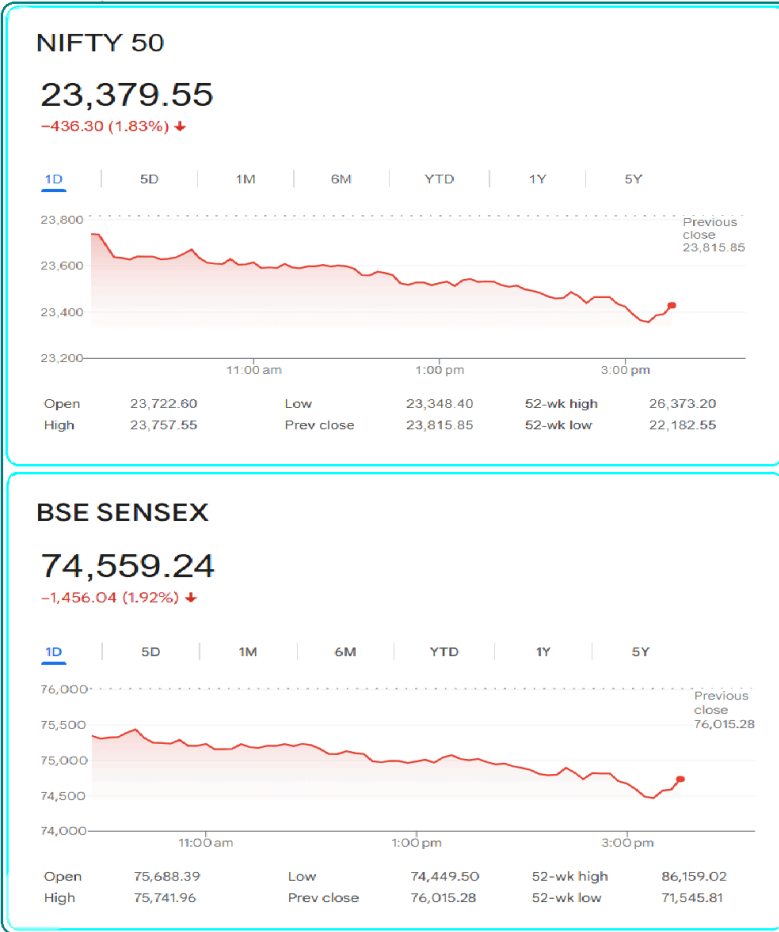


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23379.55	23815.85	<b>-1.83%</b>
<b>S&amp;P BSE SENSEX</b>	74559.24	76015.28	<b>-1.92%</b>
<b>NIFTY MID100</b>	59704.65	61258.40	<b>-2.54%</b>
<b>NIFTY SML100</b>	17939.00	18525.80	<b>-3.17%</b>

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

## Market Wrap Up

- The domestic equity benchmarks ended sharply lower, extending losses for the fourth consecutive session amid weak global market sentiment. Persistent foreign fund outflows, a weaker rupee, elevated crude oil prices, and renewed concerns over the fragile U.S.-Iran ceasefire weighed on investor confidence. The Nifty closed below the 23,400 mark. Meanwhile, the Indian rupee touched a fresh intraday record low of 95.74 against the US dollar, pressured by weak global cues.
- The S&P BSE Sensex tanked 1,456.04 points or 1.92% to 74,559.24. The Nifty 50 index fell 436.30 points or 1.83% to 23,379.55. In the four consecutive trading sessions, the Sensex tanked 2.5%, while the Nifty 50 fell 2.1%. The BSE 150 MidCap Index slipped 2.56% and the BSE 250 SmallCap Index declined 2.95%. Among the sectoral indices, the Nifty Metal index (down 0.35%), the Nifty Oil & Gas index (down 0.40%) and the Nifty Healthcare Index (down 0.08%) outperformed the Nifty 50 index. Meanwhile, the Nifty realty index (down 4.11%), Nifty IT index (down 3.73%) and the Nifty Consumer Durables index (down 3.59%) the 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 **23521** contracts at the end of the day.
- **Long** position build up for the **May** series has been witnessed in **ONGC, BHARTIARTL, SBIN**.
- **Short** position build up for the **May** series has been witnessed in **RELIANCE, LT, ICICIBANK, HDFCBANK, INFY**.
- **Unwinding** position for the **May** series has been witnessed in **DABUR, ADANIGREEN**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53555.20	54439.90	-1.63%
NIFTY AUTO	26142.60	26753.40	-2.28%
NIFTY FMCG	50453.90	51205.65	-1.47%
NIFTY IT	28234.90	29329.45	-3.73%
NIFTY METAL	12881.40	12926.40	-0.35%
NIFTY PHARMA	23840.90	24170.45	-1.36%
NIFTY REALTY	765.70	798.50	-4.11%
BSE CG	76216.88	78453.03	-2.85%
BSE CD	56329.29	58279.56	-3.35%
BSE Oil & GAS	26871.83	26875.93	-0.02%
BSE POWER	7896.46	8108.49	-2.61%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	62742.57	62417.88	0.52%
HANG SENG	26347.91	26406.84	-0.22%
STRAITS TIMES	4946.00	4942.77	0.07%
SHANGHAI	4214.49	4225.02	-0.25%
KOSPI	7643.15	7822.24	-2.29%
JAKARTA	6858.90	6905.62	-0.68%
TAIWAN	41898.32	41790.06	0.26%
KLSE COMPOSITE	1750.56	1745.31	0.30%
ALL ORDINARIES	8909.60	8942.40	-0.37%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	144731.76	138987.18
NSE F&O	193605.72	176957.51

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1959.39

(Source: [NSE](#))

## Corporate News

- **Indian Hotels Company** posted consolidated net sales at Rs 2,765.29 crore in March 2026 up 14.03% from Rs. 2,425.14 crore in March 2025. Net profit at Rs. 599.86 crore in March 2026 up 14.85% from Rs. 522.30 crore in March 2025.
- **UPL** posted consolidated net sales at Rs 18,335.00 crore in March 2026 up 17.74% from Rs. 15,573.00 crore in March 2025. Net profit at Rs. 1,061.00 crore in March 2026 up 18.42% from Rs. 896.00 crore in March 2025.
- **JSW Energy** posted consolidated net sales at Rs 4,498.58 crore in March 2026 up 41.05% from Rs. 3,189.39 crore in March 2025. Net profit at Rs. 371.57 crore in March 2026 down 8.94% from Rs. 408.05 crore in March 2025.
- **Coal India Limited** offered 30.5 million tonnes of coal in April auctions. This marks a slight decrease from March. Global energy prices are high due to West Asia tensions. Power plants are increasing coal use for energy security. Coal India is also allowing buyers from Bangladesh, Bhutan, and Nepal to participate directly in auctions from January 1, 2026.
- **Coal India** announced that the name of CIL Solar PV (a wholly owned subsidiary of Coal India) has been struck off from the Register of Companies and the said company stands dissolved.
- **Bharat Forge** announced that it has entered into a long-term contract with Embraer for the manufacturing and supply of critical landing gear forgings.
- **H.G. Infra Engineering** said that it has secured order worth Rs 3,931.11 crore from Welspun Enterprises.
- **GE Power India** posted consolidated net sales at Rs 316.40 crore in March 2026 up 18.78% from Rs. 266.38 crore in March 2025. Net profit at Rs. 113.21 crore in March 2026 down 31.07% from Rs. 164.24 crore in March 2025.
- **JB Chemicals and Pharmaceuticals** posted consolidated net sales at Rs 904.23 crore in March 2026 down 4.77% from Rs. 949.48 crore in March 2025. Net Profit at Rs. 101.37 crore in March 2026 down 30.42% from Rs. 145.69 crore in March 2025.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ONGC	294.50	281.00	4.80%
HINDALCO	1041.40	1023.50	1.75%
SBIN	974.60	973.60	0.10%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	930.45	975.95	-4.66%
ADANIPTS	1688.20	1767.30	-4.48%
TECHM	1392.90	1457.40	-4.43%
HCLTECH	1145.80	1194.90	-4.11%
JIOFIN	230.47	240.33	-4.10%

(Source: [Moneycontrol](#))

- **HFCL** announced that it has secured export orders worth around \$19.32 million (approximately Rs 183.95 crore) for the supply of optical fiber cables from reputed international customers.

- **Anant Raj** posted consolidated net sales at Rs 646.81 crore in March 2026 up 19.64% from Rs. 540.65 crore in March 2025. Net profit at Rs. 146.60 crore in March 2026 up 23.57% from Rs. 118.64 crore in March 2025.
- **Vascon Engineers** posted consolidated net sales at Rs 253.08 crore in March 2026 down 34.62% from Rs. 387.08 crore in March 2025. Net profit at Rs. 5.72 crore in March 2026 down 83.55% from Rs. 34.77 crore in March 2025.
- **JBM Auto** posted consolidated net sales at Rs 1,852.27 crore in March 2026 up 12.55% from Rs. 1,645.70 crore in March 2025. Net profit at Rs. 74.24 crore in March 2026 up 11.91% from Rs. 66.34 crore in March 2025.
- **DB Corp** posted consolidated net sales at Rs 576.39 crore in March 2026 up 5.25% from Rs. 547.66 crore in March 2025. Net profit at Rs. 62.19 crore in March 2026 up 18.84% from Rs. 52.33 crore in March 2025.
- **G R Infraprojects** posted consolidated net sales at Rs 2,500.41 crore in March 2026 up 9.88% from Rs. 2,275.57 crore in March 2025. Net profit at Rs. 206.97 crore in March 2026 down 48.76% from Rs. 403.90 crore in March 2025.

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

## Global News

- U.S. existing home sales inched higher by 0.2% from the seven-month low in the previous month to an annualized rate of 4.02 million units in April of 2026.
- Eurozone ZEW Indicator of Economic Sentiment rose by 11.3 points to -9.1 in May 2026. The assessment of the current situation also improved, with the index rising 1.6 points to -41.4.
- Germany's annual inflation rate accelerated to 2.9% in April 2026, rising from 2.7% in March. On a monthly basis, consumer prices rose 0.6% in April, matching preliminary estimates, as energy prices increased 2.1%.
- Germany's ZEW Indicator of Economic Sentiment rose by seven points to -10.2 in May 2026, recovering from an over three-year low of -17.2 in April. The current economic situation index fell to -77.8.

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

## Economic News

- Crude Oil traded at US\$ 101.37/bbl (IST 17:00).
- INR weakened to Rs. 95.64 from Rs. 95.32 against each US\$ resulting in daily change of 0.34%.
- India's retail inflation inched up to 3.48% in April from 3.40% in the previous month. From the previous month, consumer prices rose by 0.27%.
- India's unemployment rate climbed to 5% in the January-March quarter.
- India's urban unemployment rate for persons aged 15 years and above eased to 6.6% in the January-March 2026 quarter from 6.7% in the previous quarter. The rural unemployment rate, however, edged up to 4.3% during the quarter from 4.0% in October-December 2025. Overall labour force participation rate (LFPR) for persons aged 15 years and above stood at 55.5% during January-March 2026, compared to 55.8% in the previous quarter. Urban LFPR slipped marginally to 50.2% from 50.4%, while rural LFPR eased to 58.2% from 58.4% in the preceding quarter. The overall female LFPR remained broadly unchanged at 34.7% in the January-March quarter, compared to 34.9% in the previous quarter. Rural female LFPR stood at 39.2%, down from 39.4%, while urban female LFPR remained nearly stable at 25.4% against 25.5% earlier.
- Moody's Ratings has cut India's GDP growth forecast for 2026 by 0.8 percentage points to 6%, citing weak private consumption, slower capital formation and industrial activity, along with higher energy costs. It also lowered the 2027 growth outlook to 6% from earlier estimates, pointing to lingering global and domestic pressures.
- India's gold imports are at an all-time high, reaching \$71.98 billion in 2025-26. This surge is driven by increased prices and trade agreements. High imports pressure India's trade deficit and foreign exchange. The government is reviewing trade policies to curb these imports and protect reserves.
- India is identifying 100 products for enhanced domestic manufacturing, including auto parts, to boost production for global markets. A 'Made in India Brand Scheme' is planned, following a successful pilot in the steel sector, to assure quality and value addition. Companies are urged to invest long-term, leveraging opportunities from new free trade agreements and the impact of AI on manufacturing.
- India anticipates a US trade delegation for upcoming talks, which will address all outstanding issues, including the Section 301 probe. A proposed trade deal with the US will not progress until this investigation concludes. The US initiated the Section 301 investigation in March, alleging India's excess capacity in several sectors.
- India's economic growth is projected to slow to 6 percent in FY27. This slowdown is attributed to an energy crisis and insufficient rainfall. These factors will also increase inflation. The Reserve Bank may raise interest rates twice this fiscal year to manage rising prices.
- India's Centre has lowered royalty rates for crude oil and natural gas production. This move aims to encourage more domestic exploration and production. Deepwater and ultra-deepwater fields will see significant royalty reductions. New policies offer zero royalty for initial years in these challenging areas.

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

## Forthcoming Events

### Board Meetings as on 13/05/2026

Bharti Airtel Limited	Financial Results/Dividend
Cipla Limited	Financial Results/Dividend
Tata Motors Limited	Financial Results/Dividend
TVS Motor Company Limited	Financial Results
GlaxoSmithKline Pharmaceuticals Limited	Financial Results/Dividend
Hindustan Petroleum Corporation Limited	Financial Results/Dividend
DLF Limited	Financial Results/Dividend
LIC Housing Finance Limited	Financial Results/Dividend
Power Finance Corporation Limited	Financial Results/Dividend
NLC India Limited	Financial Results/Dividend
Oil India Limited	Financial Results/Dividend
Gabriel India Limited	Financial Results/Dividend
ADF Foods Limited	Financial Results/Dividend
Balaji Amines Limited	Financial Results/Dividend
Bharti Hexacom Limited	Financial Results/Dividend
Capital Small Finance Bank Limited	Fund Raising
CARE Ratings Limited	Financial Results/Dividend
Crompton Greaves Consumer Electricals Limited	Financial Results/Dividend
DCM Shriram Limited	Financial Results/Dividend
GK Energy Limited	Financial Results
Interarch Building Solutions Limited	Financial Results/Dividend
Inventurus Knowledge Solutions Limited	Financial Results
JSW Dulux Limited	Financial Results/Dividend
Kaynes Technology India Limited	Financial Results
Kirloskar Brothers Limited	Financial Results/Dividend
Laxmi India Finance Limited	Financial Results
Man Infraconstruction Limited	Financial Results/Dividend
Metropolis Healthcare Limited	Financial Results/Dividend
Onesource Specialty Pharma Limited	Financial Results
Paramount Communications Limited	Fund Raising
Paras Defence and Space Technologies Limited	Financial Results/Dividend
Redington Limited	Financial Results/Dividend
Sharda Cropchem Limited	Financial Results/Dividend
SKF India Limited	Financial Results/Dividend
Texmaco Infrastructure & Holdings Limited	Financial Results/Dividend
The Bombay Burmah Trading Corporation Limited	Financial Results/Dividend

Tourism Finance Corporation of India Limited	Financial Results/Dividend/Fund Raising
Tube Investments of India Limited	Financial Results/Dividend/Fund Raising
TVS Holdings Limited	Financial Results/Fund Raising
Zaggle Prepaid Ocean Services Limited	Financial Results
ZF Commercial Vehicle Control Systems India Limited	Financial Results/Dividend/Bonus

(Source: NSE)

### Board Meetings as on 13/05/2026

NRB Bearing Limited	Interim Dividend - Rs 2.25 Per Share
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(Source: NSE)

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