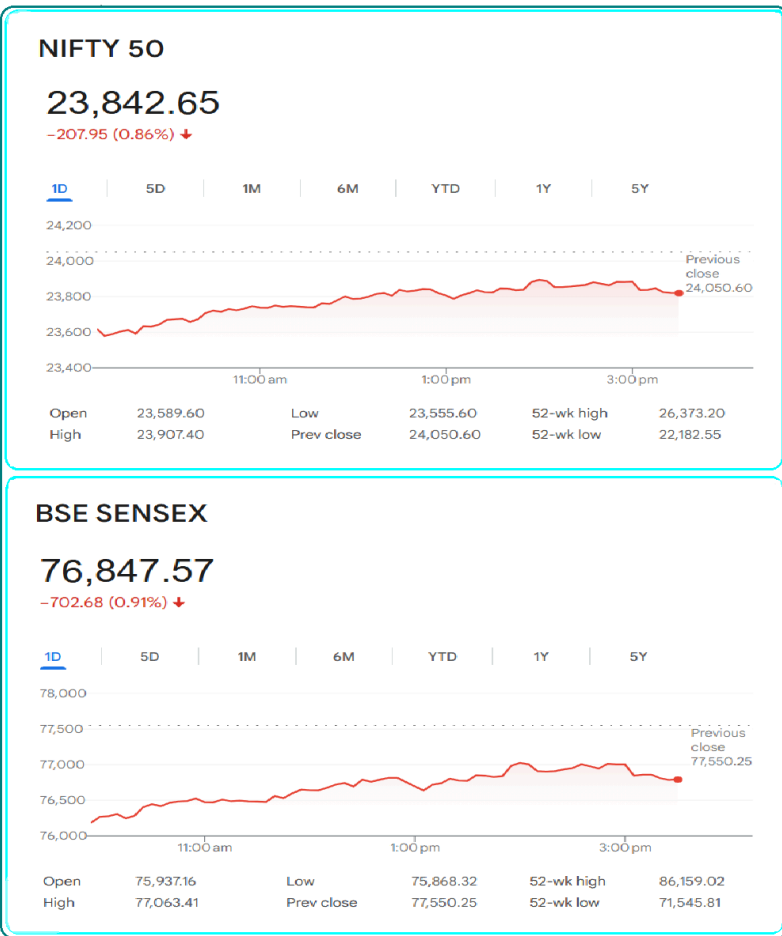


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23842.65	24050.60	<b>-0.86%</b>
<b>S&amp;P BSE SENSEX</b>	76847.57	77550.25	<b>-0.91%</b>
<b>NIFTY MID100</b>	57513.30	57843.95	<b>-0.57%</b>
<b>NIFTY SML100</b>	16762.00	16840.10	<b>-0.46%</b>

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

## Market Wrap Up

- The headline equity benchmarks ended with major losses, tracking weak global cues after U.S.-Iran ceasefire talks collapsed and crude oil prices surged, raising concerns that the Middle East conflict could prolong. The Nifty ended below the 23,850 mark.
- The S&P BSE Sensex tanked 702.68 points or 0.91% to 76,847.57. The Nifty 50 index declined 207.95 points or 0.86% to 23,842.65.
- The BSE 150 MidCap Index slipped 0.72% and the BSE 250 SmallCap Index fell 0.42%.
- Among the sectoral indices, the Nifty Metal index (down 0.22%), the Nifty Realty index (down 0.27%) and the Nifty Healthcare Index (down 0.28%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Auto index (down 2.09%), Nifty Oil & Gas index (down 1.41%) and the Nifty FMCG index (down 1.29%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **April** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **8563** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **ICICIBANK, AXISBANK, COALINDIA**.
- **Short** position build up for the **April** series has been witnessed in **RELIANCE, BHARTIARTL, HDFCBANK, INFY**.
- **Unwinding** position for the **April** series has been witnessed in **SBIN, HDFCBANK**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55605.05	55912.75	-0.55%
NIFTY AUTO	26084.55	26640.90	-2.09%
NIFTY FMCG	47570.40	48194.05	-1.29%
NIFTY IT	30669.80	31030.60	-1.16%
NIFTY METAL	12329.30	12356.40	-0.22%
NIFTY PHARMA	22100.10	22164.85	-0.29%
NIFTY REALTY	757.20	759.25	-0.27%
BSE CG	71902.80	72180.77	-0.39%
BSE CD	57869.78	58203.23	-0.57%
BSE Oil & GAS	26348.20	26681.26	-1.25%
BSE POWER	7351.57	7286.60	0.89%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	56502.77	56924.11	-0.74%
HANG SENG	25660.85	25893.54	-0.90%
STRAITS TIMES	4984.17	4989.41	-0.11%
SHANGHAI	CLOSED	3986.23	-
KOSPI	5808.62	5858.87	-0.86%
JAKARTA	7500.19	7458.50	0.56%
TAIWAN	35457.29	35417.83	0.11%
KLSE COMPOSITE	1680.52	1691.31	-0.64%
ALL ORDINARIES	9113.40	9155.80	-0.46%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	129987.55	131731.07
NSE F&O	189463.59	170919.96

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1983.18

(Source: [NSE](#))

## Corporate News

- **Larsen & Toubro** said its real estate arm, L&T Realty Properties, has acquired a 100% stake in International Green Scapes for Rs 1,123 crore in an all-cash deal, as it looks to expand its residential portfolio in Gurugram.
- **Hindustan Petroleum Corp** is seeking a liquefied petroleum gas tanker. The vessel will load propane and butane from Russia's Ust-Luga port. This move aims to secure cooking gas supplies amid a severe shortage. India is diversifying its LPG sources due to disruptions in the Middle East.
- **Puravankara Ltd** reported Q4 FY26 sales of Rs. 3,547 crore, up 190% year-on-year, while full-year sales rose 55% to Rs. 7,407 crore. Customer collections increased 36% in Q4 and 15% for the year, supported by new project launches and higher price realisations.
- **BEML** said it has secured an export order worth \$36.38 million from the Middle East region for the supply of heavy earth moving equipment.
- **R R Kabel** has announced the expansion of its fast-moving electrical goods (FMEG) portfolio with its foray into the kitchen appliances segment and the expansion of its air coolers range, under its premium appliance brand 'RR Signature'.
- **Adani Enterprises** announced that its step-down wholly owned subsidiary, Adani Airport City, has incorporated four new wholly owned subsidiaries.
- **Oriental Rail Infrastructure** said that it has secured an order from Rail Coach Factory (RCF), Kapurthala, under Indian Railways, for the manufacturing, supply, and installation of 25 sets of seats and berths for LHB coaches. The total contract value is Rs 1.57 crore.
- **Lupin** announced the launch of Dapagliflozin Tablets in strengths of 5 mg and 10 mg in the United States, following approval of its abbreviated new drug application (ANDA) by the U.S. Food and Drug Administration.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HDFCLIFE	619.10	604.15	2.47%
ICICIBANK	1351.10	1321.90	2.21%
ADANIENT	2129.00	2086.80	2.02%
NTPC	386.25	380.15	1.60%
TMPV	345.50	342.60	0.85%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	7050.00	7424.00	-5.04%
MARUTI	13076.00	13709.00	-4.62%
INDIGO	4427.20	4554.20	-2.79%
BAJFINANCE	898.95	924.55	-2.77%
RELIANCE	1315.10	1350.20	-2.60%

(Source: [Moneycontrol](#))

- **Texmaco Rail & Engineering** has secured an order worth Rs 23.57 crore from Hindalco Industries for the supply of one BTAP rake and one brake van.

- **Torrent Pharmaceuticals** said the U.S. Food and Drug Administration (USFDA) has completed an inspection of its Bileshwarpura oncology facility with zero observations.
- **Panacea Biotec** announced that it has received a letter of award (LoA) worth Rs 20.79 crore from Central Medical Services Society, under the Ministry of Health and Family Welfare, Government of India.
- **Emerald Leisures** has received a letter of intent (LoI) for the development of a residential redevelopment project at Swastik Park, Chembur in Mumbai, with an estimated revenue potential of around Rs 600 crore.
- **GHV Infra Projects** has entered into a construction contract worth Rs 1,250 crore with APCO Infratech for infrastructure development in Maharashtra.
- **Enviro Infra Engineers** secured two major engineering, procurement and construction (EPC) contracts from the Swachh Maharashtra Mission Directorate, with a combined value of Rs 972.19 crore.

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

## Global News

- China's new yuan loans extended by Chinese banks fell to CNY 2.990 trillion in March of 2026 from CNY 3.363 trillion in the corresponding period of the previous year. Aggregate financing fell to CNY 5.23 trillion in March from CNY 5.896 trillion. M2 money supply rose 9.0% year-on-year to a record CNY 347.19 trillion in January 2026, rising from CNY 340.29 trillion in December 2025.
- U.S. annual inflation rate jumped to 3.3% in March 2026, marking the highest level since May 2024 and a sharp increase from 2.4% in both February and January. On a monthly basis, consumer prices rose 0.9%, the largest increase since June 2022, following a 0.3% gain in February. Core inflation rose to 2.6% in March of 2026 from 2.5% in the previous two months. On a monthly basis, core consumer prices increased by 0.2%.
- U.S. government recorded a \$164.1 billion budget deficit in March 2026, compared with a \$160.5 billion deficit a year earlier, and missing forecasts of \$156.7 billion.
- U.S.'s University of Michigan said its consumer sentiment index plunged to 47.6 in April after falling to 53.3 in March.
- U.S. factory orders were virtually unchanged in February, while revised data showed factory orders were also virtually unchanged in January.

- Germany's current account surplus expanded to EUR 22.0 billion in February 2026, up from EUR 21.3 billion in the same month last year.

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

## Economic News

- Crude Oil traded at US\$ 103.77/bbl (IST 17:00).
- INR weakened to Rs. 93.39 from Rs. 92.74 against each US\$ resulting in daily change of 0.70%.
- India's annual inflation rate rose to 3.4% in March of 2026 from 3.21% in the previous month. From the previous month, Indian consumer prices rose by 0.26%.
- A commentary argues that US President Donald Trump may be underestimating Iran's leverage in the Strait of Hormuz, warning that a blockade is more likely to deepen conflict than force concessions. It says energy blockades are acts of war, slow to take effect, and risk collapsing the fragile ceasefire while hurting the global economy.
- India's coal import dropped 8.5% to 16.55 million tonnes in February on record stockpile of domestic coal and firmness in seaborne prices. The import in February 2024-25 stood at 18.10 (MT).
- The Asian Development Bank (ADB) raised India's GDP growth forecast to 6.9% for FY2026-27 from its previous estimate of 6.5%.
- India's palm oil imports fell nearly 19% month-on-month in March to a three-month low of 689,462 tonnes, as higher global prices prompted refiners to delay purchases, according to the Solvent Extractors' Association of India.
- India's rural economy faces a dual threat in 2026 from a potential below-normal monsoon and rising input costs due to the US-Iran conflict. This combination could significantly impact agricultural output, farmer incomes, and rural demand, potentially leading to increased food inflation and straining government finances.
- Net FDI into India contracted for a fifth straight month in January as gross inflows fell 6.9% on-year to around \$5.7 billion, but the amount repatriated out of the country nearly doubled to \$4.9 billion.

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

## Forthcoming Events

### Board Meetings as on 14/04/2026

Anand Rathi Share And Stock Brokers Ltd	Financial Results/Dividend
ICICI Prudential Life Insurance Company Ltd	Financial Results/Dividend
Nuvoco Vistas Corporation Ltd	Financial Results
Den Networks Ltd	Financial Results
Eimco Elecon (India) Ltd	Financial Results/Dividend
Hathway Bhawani Cabletel & Datacom Ltd	Financial Results

### Board Meetings as on 15/04/2026

HDB Financial Services Ltd	Financial Results/Dividend
ICICI Lombard General Insurance Company Ltd	Financial Results/Dividend
Bombay Wire Ropes Ltd	Financial Results
Elecon Engineering Company Ltd	Financial Results/Dividend
GTPL Hathway Ltd	Financial Results/Dividend
Reliance Industrial Infrastructure Ltd	Financial Results/Dividend
Tejas Networks Ltd	Financial Results
Tulsi Extrusions Ltd	Financial Results

(Source: NSE)

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