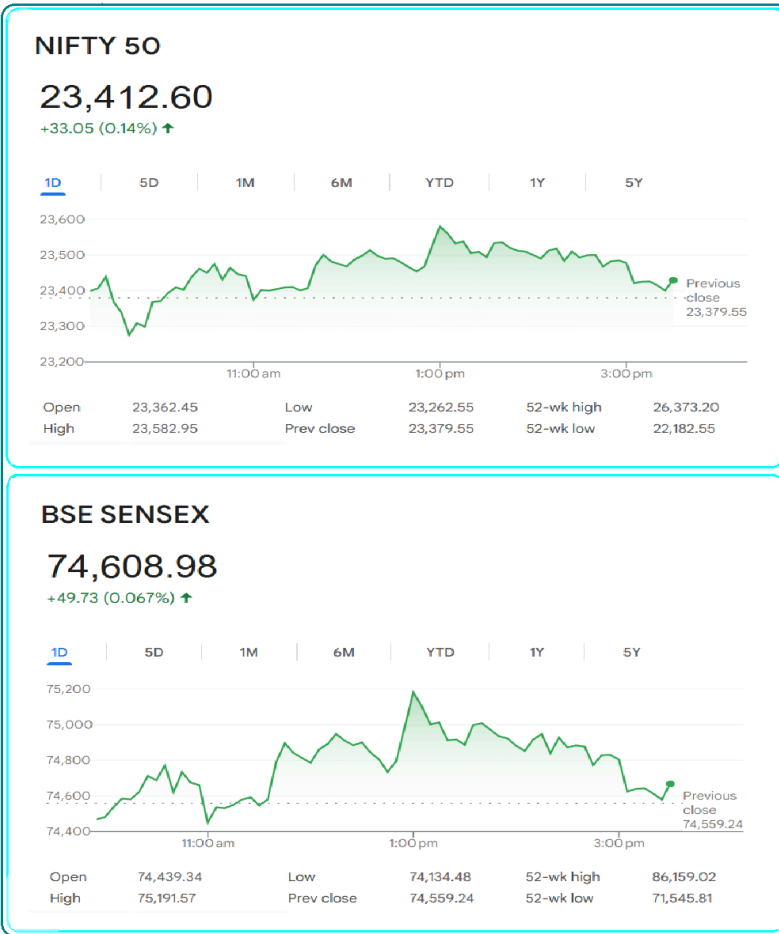


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23412.60	23379.55	0.14%
S&P BSE SENSEX	74608.98	74559.24	0.07%
NIFTY MID100	60164.65	59704.65	0.77%
NIFTY SML100	17994.05	17939.00	0.31%

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

Market Wrap Up

- Domestic equity indices ended with small gains, snapping a four-days losing streak. However, sentiment remained fragile amid elevated crude oil prices, persistent foreign investor outflows, rupee weakness, and lingering global inflation concerns. The Nifty settles above the 23,400 level. Meanwhile, the Indian rupee touched a fresh intraday record low of 95.80 against the US dollar, pressured by weak global cues.
- The S&P BSE Sensex advanced 49.74 points or 0.07% to 74,608.98. The Nifty 50 index added 33.05 points or 0.14% to 23,412.60. In the past four consecutive trading sessions, the Sensex declined 4.43%, while the Nifty 50 fell 3.96%. The BSE 150 MidCap Index climbed 0.71% and the BSE 250 SmallCap Index jumped 0.27%.
- Among the sectoral indices, the Nifty Metal index (up 3.18%), the Nifty Consumer Durables index (up 1.67%) and the Nifty Oil & Gas Index (up 1.28%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.13%), Nifty Auto index (down 0.97%) and the Nifty Realty index (down 0.19%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **May** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **3933** contracts at the end of the day.
- **Long** position build up for the **May** series has been witnessed in **LT, BHARTIARTL**.
- **Short** position build up for the **May** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK**.
- **Unwinding** position for the **May** series has been witnessed in **ONGC, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53456.15	53555.20	-0.18%
NIFTY AUTO	25888.95	26142.60	-0.97%
NIFTY FMCG	50604.85	50453.90	0.30%
NIFTY IT	27916.65	28234.90	-1.13%
NIFTY METAL	13290.80	12881.40	3.18%
NIFTY PHARMA	23896.05	23840.90	0.23%
NIFTY REALTY	764.25	765.70	-0.19%
BSE CG	77073.96	76216.88	1.12%
BSE CD	57699.27	56329.29	2.43%
BSE Oil & GAS	27348.07	26871.83	1.77%
BSE POWER	7899.47	7896.46	0.04%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	63272.11	62742.57	0.84%
HANG SENG	26388.44	26347.91	0.15%
STRAITS TIMES	5003.96	4946.00	1.17%
SHANGHAI	4242.57	4214.49	0.67%
KOSPI	7844.01	7643.15	2.63%
JAKARTA	6723.32	6858.90	-1.98%
TAIWAN	41374.50	41898.32	-1.25%
KLSE COMPOSITE	1746.31	1750.56	-0.24%
All ORDINARIES	8880.70	8909.60	-0.32%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	138604.95	144731.76
NSE F&O	168218.43	193605.72

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4703.15

(Source: [NSE](#))

Corporate News

- **Dr Reddys Laboratories** posted consolidated net sales at Rs 7,546.40 crore in March 2026 down 11.51% from Rs. 8,528.40 crore in March 2025. Net profit at Rs. 220.90 crore in March 2026 down 86.14% from Rs. 1,593.30 crore in March 2025.
- **Cipla** posted consolidated net sales at Rs 6,541.20 crore in March 2026 down 2.8% from Rs. 6,729.69 crore in March 2025. Net profit at Rs. 554.64 crore in March 2026 down 54.61% from Rs. 1,221.84 crore in March 2025.
- **TVS Motor Company** posted consolidated net sales at Rs 15,052.73 crore in March 2026 up 30.42% from Rs. 11,542.00 crore in March 2025. Net profit at Rs. 771.52 crore in March 2026 up 19.03% from Rs. 648.16 crore in March 2025.
- **Hindustan Petroleum Corporation** posted consolidated net sales at Rs 114,937.21 crore in March 2026 up 4.84% from Rs. 109,632.80 crore in March 2025. Net profit at Rs. 6,065.26 crore in March 2026 up 77.58% from Rs. 3,415.44 crore in March 2025.
- **Power Finance Corporation** posted consolidated net sales at Rs 28,919.52 crore in March 2026 down 1.18% from Rs. 29,265.03 crore in March 2025. Net profit at Rs. 6,998.99 crore in March 2026 up 10.81% from Rs. 6,316.45 crore in March 2025.
- **Thomas Cook (India)** posted consolidated net sales at Rs 1,770.69 crore in March 2026 down 10.07% from Rs. 1,968.86 crore in March 2025. Net profit at Rs. 38.66 crore in March 2026 down 40.13% from Rs. 64.57 crore in March 2025.
- **Berger Paints India** posted consolidated net sales at Rs 2,868.03 crore in March 2026 up 6.07% from Rs. 2,704.03 crore in March 2025. Net profit at Rs. 334.77 crore in March 2026 up 27.75% from Rs. 262.05 crore in March 2025.
- **Kalpataru** posted consolidated net sales at Rs 1,693.73 crore in March 2026 up 183.76% from Rs. 596.89 crore in March 2025. Net profit at Rs. 200.47 crore in March 2026 up 1326.83% from Rs. 14.05 crore in March 2025.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	2617.60	2505.50	4.47%
ADANIENT	2498.00	2405.20	3.86%
TATASTEEL	219.62	212.00	3.59%
HINDALCO	1073.10	1041.40	3.04%
ADANIPTS	1737.80	1688.20	2.94%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	6971.50	7126.00	-2.17%
M&M	3111.80	3176.00	-2.02%
POWERGRID	301.50	306.30	-1.57%
INFY	1123.10	1140.30	-1.51%
TATCONSUM	1235.00	1253.00	-1.44%

(Source: [Moneycontrol](#))

- **Max Financial Services** posted consolidated net sales at Rs 10,801.94 crore in March 2026 down 12.72% from Rs. 12,375.76 crore in March 2025. Net loss at Rs. 26.35 crore in March 2026 down 184.16% from Rs. 31.31 crore in March 2025.
- **Larsen & Toubro's** Power Transmission & Distribution division has won new orders in the Middle East. The company will build extra-high voltage substations. These projects will ensure reliable power supply to major areas.
- **Maruti Suzuki** is investing Rs 1,372 crore in green logistics infrastructure. The company plans to increase vehicle dispatches by rail to 35 percent by fiscal year 2030-31.
- **Biocon Pharma Ltd** has secured Health Canada approval for its micafungin for injection. This medication targets serious fungal infections in adults and children. It will be used for conditions like candidemia and esophageal candidiasis. The approval also covers prophylaxis in stem cell transplant patients. This marks a significant addition to Biocon's product offerings.

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

Global News

- U.S. annual inflation rate accelerated to 3.8% in April 2026, the highest since May 2023, and compared to 3.3% in March. Compared to the previous month, the CPI was up 0.6%, easing from the 0.9% rise recorded in March. Core inflation rate also edged higher to 2.8% year-on-year, from 2.6% in March and above forecasts of 2.7%. On a monthly basis, core consumer prices increased by 0.4%, up from 0.2% in both February and March.
- U.S. private employers added an average of 33,000 jobs per week in the four weeks ending April 25, 2026, slightly up from the 30,250 weekly gain in the prior period.
- U.S. government recorded a \$215 billion budget surplus in April 2026, down from \$258.4 billion in the same month a year earlier.
- Eurozone industrial production increased 0.2% month-over-month in March 2026, after a downwardly revised 0.2% rise in February. Year-over-year, industrial activity dropped 2.1% in March, more than forecasts of a 1.7% fall.
- Germany's wholesale prices surged 6.3% year-on-year in April 2026, accelerating from a 4.1% growth in the prior month. On a monthly basis, wholesale prices increased 2.0%, slowing from March's 2.7%.
- France's annual inflation rose to 2.2% in April 2026 from 1.7% in March. On a monthly basis, CPI rose 1.0%, unchanged

from March.

- France's unemployment rate rose to 8.1% in the first quarter of 2026, above market forecasts of 7.8%, from 7.9% in the previous quarter.
- Japan's current account surplus increased to JPY 4,681.5 billion in March 2026 from JPY 3,625.3 billion in the same month a year earlier.

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

Economic News

- Crude Oil traded at US\$ 102.12/bbl (IST 17:00).
- INR weakened to Rs. 95.71 from Rs. 95.64 against each US\$ resulting in daily change of 0.07%.
- Global oil supply is set to fall short of demand this year, with the Iran war severely impacting Middle East production. The International Energy Agency reports significant supply losses and a projected deficit of 1.78 million barrels per day by 2026. Demand is also expected to decline due to price spikes and economic slowdown caused by the conflict.
- India has significantly raised customs duties on gold, silver, and platinum imports to 15% and 15.4%, respectively. This move aims to conserve foreign exchange reserves and stabilise the external account amidst the West Asia conflict and global economic uncertainty. The government seeks to moderate non-essential imports and support macroeconomic stability.
- India has contracted diammonium phosphate (DAP) fertilizer at prices nearly 40% higher than pre-war levels as the Middle East conflict disrupts supplies and lifts global prices. Indian Potash Ltd. agreed to buy about 1.35 million tons of DAP for delivery on the west and east coasts at around \$930-\$935 per ton, exceeding the 1.2 million tons sought in last week's tender.
- India and Japan have strengthened economic ties. A key dialogue focused on industrial and technological cooperation. Five sectors were prioritised: critical minerals, semiconductors, ICT, clean energy, and pharmaceuticals. Both nations aim to build resilient supply chains. Discussions also covered defense, trade, and energy security.
- India's vegetable oil imports surged 13% to 7.94 million tonnes in the first half of the 2025-26 oil year. Palm oil shipments nearly doubled, boosting overall imports. This rise occurred despite increased cooking oil prices and a depreciating rupee. Stocks of vegetable oil also showed a significant increase, indicating improved supply availability.

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

Forthcoming Events

Board Meetings as on 14/05/2026

JSW Steel Limited	Financial Results/Dividend/Fund Raising
Tata Motors Passenger Vehicles Limited	Financial Results/Dividend
Siemens Energy India Limited	Financial Results
Voltas Limited	Financial Results/Dividend
Apollo Tyres Limited	Financial Results/Dividend
Hindustan Aeronautics Limited	Financial Results
Akums Drugs and Pharmaceuticals Limited	Financial Results/Dividend
Allcargo Logistics Limited	Financial Results
Allied Blenders and Distillers Limited	Financial Results/Dividend/Fund Raising
Atlas Cycles (Haryana) Limited	Financial Results
Caplin Point Laboratories Limited	Financial Results/Dividend
Carborundum Universal Limited	Financial Results/Dividend
Chalet Hotels Limited	Financial Results/Dividend/Fund Raising
Chambal Fertilizers & Chemicals Limited	Financial Results/Dividend
Clean Science and Technology Limited	Financial Results/Dividend
CMS Info Systems Limited	Financial Results/Dividend/Buyback
Crown Lifters Limited	Financial Results
Data Patterns (India) Limited	Financial Results/Dividend
Deccan Cements Limited	Fund Raising
Deep Industries Limited	Financial Results
Dilip Buildcon Limited	Financial Results/Dividend
Endurance Technologies Limited	Financial Results/Dividend
Galaxy Surfactants Limited	Financial Results/Dividend
Gujarat Mineral Development Corporation Limited	Financial Results/Dividend
Hindustan Construction Company Limited	Financial Results/Fund Raising
Housing & Urban Development Corporation Limited	Financial Results/Dividend
Hubtown Limited	Financial Results
India Glycols Limited	Financial Results
Indian Hume Pipe Company Limited	Financial Results/Dividend
Indian Railway Finance Corporation Limited	Financial Results
IndiGrid Infrastructure Trust	Financial Results/Fund Raising
Kalpataru Projects International Limited	Financial Results/Dividend
Kirloskar Oil Engines Limited	Financial Results/Dividend
KRBL Limited	Financial Results/Dividend
KRN Heat Exchanger and Refrigeration Limited	Financial Results
LT Foods Limited	Financial Results/Dividend

Matrimony.Com Limited	Financial Results/Dividend
Mold-Tek Technologies Limited	Financial Results
Mukand Limited	Financial Results/Dividend
Muthoot Finance Limited	Financial Results
NIIT Limited	Financial Results/Dividend
Nilkamal Limited	Financial Results/Dividend
P N Gadgil Jewellers Limited	Financial Results
Patel Engineering Limited	Financial Results
Restaurant Brands Asia Limited	Financial Results
Sai Life Sciences Limited	Financial Results
Saregama India Limited	Financial Results
Shadowfax Technologies Limited	Financial Results
Sheela Foam Limited	Financial Results/Dividend
TD Power Systems Limited	Financial Results/Dividend/Stock Split
The Great Eastern Shipping Company Limited	Financial Results/Dividend
Timken India Limited	Financial Results/Dividend
TVS Infrastructure Trust	Financial Results
United Spirits Limited	Financial Results/Dividend
Vishal Mega Mart Limited	Financial Results
Welspun Enterprises Limited	Financial Results/Dividend/Fund Raising

(Source: NSE)

Board Meetings as on 14/05/2026

Brookfield India Real Estate Trust	Distribution - Rs 5.50 Per Unit Consisting Of Interest - Rs 1.60 Per Unit/ Repayment Of Spv Debt - Rs 2.96 Per Unit/ Dividend - Re 0.88 Per Unit/ Interest On Fixed Deposit - Re 0.06 Per Unit
Kewal Kiran Clothing Limited	Interim Dividend - Rs 2 Per Share
Oberoi Realty Limited	Interim Dividend - Rs 2 Per Share

(Source: NSE)

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