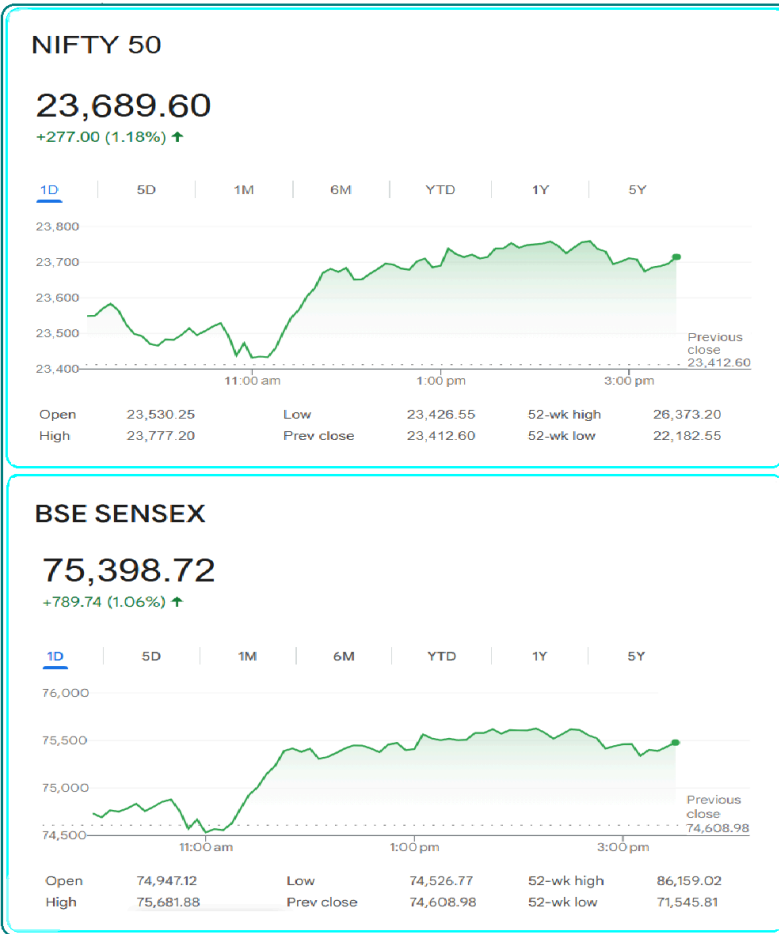


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23689.60	23412.60	1.18%
S&P BSE SENSEX	75398.72	74608.98	1.06%
NIFTY MID100	60839.70	60164.65	1.12%
NIFTY SML100	17991.55	17994.05	-0.01%

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

Market Wrap Up

- The headline equity indices ended with robust gains, extending gains for the second straight session, supported by steady corporate earnings and positive global cues amid optimism over ongoing U.S.-China discussions. However, gains were capped by elevated crude oil prices and continued foreign fund outflows, which pushed the rupee to another record low. The Nifty ended above the 23,650 mark. Barring the IT index, all other sectoral indices on the NSE ended in the green.
- The S&P BSE Sensex surged 789.74 points or 1.06% to 75,398.72. The Nifty 50 index rose 277 points or 1.18% to 23,689.60. In two consecutive trading sessions, the Sensex jumped 1.13% while the Nifty 50 added 1.33%. The BSE 150 MidCap Index climbed 0.95% and the BSE 250 SmallCap Index jumped 0.18%.
- Among the sectoral indices, the Nifty Pharma index (up 2.74%), the Nifty Healthcare index (up 2.56%) and the Nifty Metal Index (up 2.04%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 1.99%), Nifty Oil & Gas index (up 0.04%) and the Nifty FMCG index (up 0.34%) 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 **83763** contracts at the end of the day.
- **Long** position build up for the **May** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **ICICIBANK**, **HDFCBANK**.
- **Short** position build up for the **May** series has been witnessed in **INFY**, **COALINDIA**.
- **Unwinding** position for the **May** series has been witnessed in **LT**, **SBIN**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54128.95	53456.15	1.26%
NIFTY AUTO	26049.70	25888.95	0.62%
NIFTY FMCG	50779.15	50604.85	0.34%
NIFTY IT	27360.35	27916.65	-1.99%
NIFTY METAL	13562.25	13290.80	2.04%
NIFTY PHARMA	24551.05	23896.05	2.74%
NIFTY REALTY	770.10	764.25	0.77%
BSE CG	77604.31	77073.96	0.69%
BSE CD	58238.36	57699.27	0.93%
BSE Oil & GAS	27321.70	27348.07	-0.10%
BSE POWER	8013.32	7899.47	1.44%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	62654.05	63272.11	-0.98%
HANG SENG	26389.04	26388.44	0.00%
STRAITS TIMES	4995.94	5003.96	-0.16%
SHANGHAI	4177.92	4242.57	-1.52%
KOSPI	7981.41	7844.01	1.75%
JAKARTA	CLOSED	6723.32	-
TAIWAN	41751.75	41374.50	0.91%
KLSE COMPOSITE	1745.58	1746.31	-0.04%
All ORDINARIES	8884.70	8880.70	0.05%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	143017.67	138604.95
NSE F&O	167916.03	168218.43

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	187.46
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Bharti Airtel** posted consolidated net sales at Rs 55,383.20 crore in March 2026 up 15.68% from Rs. 47,876.20 crore in March 2025. Net profit at Rs. 7,325.10 crore in March 2026 down 33.54% from Rs. 11,021.80 crore in March 2025.
- **Tata Motors'** commercial vehicles business reported a strong set of earnings for the fiscal fourth quarter of FY26, with consolidated profit after tax rising 35% year-on-year to around Rs 1,800 crore. The rise in net profit was helped by higher volumes, improved margins and operating leverage. Consolidated revenue for the quarter stood at Rs 26,100 crore, up 19% on-year.
- **DLF** posted consolidated net sales at Rs 1,814.06 crore in March 2026 down 42% from Rs. 3,127.58 crore in March 2025. Net profit at Rs. 1,268.56 crore in March 2026 down 1.06% from Rs. 1,282.20 crore in March 2025.
- **LIC Housing Finance** posted consolidated net sales at Rs 7,211.92 crore in March 2026 down 1.28% from Rs. 7,305.52 crore in March 2025. Net profit at Rs. 1,492.54 crore in March 2026 up 8.68% from Rs. 1,373.38 crore in March 2025.
- **eClerx Services** posted consolidated net sales at Rs 1,107.29 crore in March 2026 up 23.27% from Rs. 898.29 crore in March 2025. Net profit at Rs. 171.49 crore in March 2026 up 12.7% from Rs. 152.16 crore in March 2025.
- **GlaxoSmithKline Pharmaceuticals** posted consolidated net sales at Rs 995.30 crore in March 2026 up 2.15% from Rs. 974.37 crore in March 2025. Net profit at Rs. 277.86 crore in March 2026 up 5.7% from Rs. 262.87 crore in March 2025.
- **Zydus** is acquiring US-based Assertio Holdings for \$166.40 million to bolster its specialty oncology presence in the US. The deal, structured as a tender offer followed by a merger, will give Zydus access to Assertio's commercial platform and its approved oncology asset, Rolvedon. This strategic move aims to expand Zydus's footprint in the US specialty oncology market.
- **Eicher Trucks and Buses** signed an initial pact with app-based city-bus services operator Cityflo to supply around 2,000 buses over a three-year period, with nearly

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
CIPLA	1436.70	1327.60	8.22%
BHARTIARTL	1883.50	1789.20	5.27%
ETERNAL	245.82	237.82	3.36%
DRREDDY	1303.60	1265.30	3.03%
HINDALCO	1103.30	1073.10	2.81%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1095.00	1123.10	-2.50%
TECHM	1343.40	1375.00	-2.30%
COALINDIA	454.05	462.25	-1.77%
HCLTECH	1124.00	1143.20	-1.68%
TCS	2246.00	2272.80	-1.18%

(Source: [Moneycontrol](#))

- **Bharti Airtel's** board approved a Rs 28,220 crore share-swap deal with ICIL, a Mittal family entity, to increase its stake in Airtel Africa to 79%. This cashless transaction preserves company cash, boosts ICIL's holding in Bharti Airtel, and is expected to be accretive to earnings per share.

500 buses slated for deployment in the current financial year.

- **Alembic Pharmaceuticals** announced that it had received tentative approval from the US Food and Drug Administration (USFDA) for its abbreviated new drug application (ANDA) for Darolutamide Tablets, 300 mg.
- **NBCC (India)** announced that it has secured orders worth Rs 131.02 crore related to construction projects. The company received its first order from Central Bank of India valued at Rs 25.52 crore. The second order was awarded by the Resident Commissioner, Government of Andhra Pradesh valued at Rs 105.50 crore.
- **MTAR Technologies** announced purchase orders worth \$238.76 million, equivalent to around Rs 2,278.96 crore.
- **Rail Vikas Nigam** announced that it has emerged as the Lowest Bidder (L1) for a project awarded by South East Central Railway worth Rs 221.33 crore.
- **PNC Infratech** announced that a joint venture (JV) comprising the company has emerged as the first lowest (L1) bidder for a bridge construction project in Uttar Pradesh worth Rs 571.81 crore.

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

Global News

- China's new yuan loans by Chinese banks fell by a net CNY 10 billion in April of 2026, contrasting with the net CNY 285 billion extended in the corresponding period of the previous year. Likewise, aggregate financing, fell to a net CNY 620 billion in the period. 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. The value of loans in China increased 5.60% in April of 2026 over the same month in the previous year.
- U.S. producer prices soared 1.4% month-over-month in April 2026, the biggest increase since March 2022, following an upwardly revised 0.7% gain in March. Year-on-year, producer prices jumped 6%, following an upwardly revised 4.3% rise in the previous month. Core producer prices rose by 1% over a month earlier in April 2026, following an upwardly revised 0.2% increase in March. On a yearly basis, core producer prices rose by 5.2% in April, up from 4% in March.
- U.K. economy expanded by 0.6% in Q1 2026, this follows an upwardly revised 0.2% increase in the previous quarter. Services output rose by 0.8%, up from 0.2% in the prior period. Annually, the economy expanded by 1.1% in Q1 2026. The GDP expanded 0.3% month-on-month in March 2026, slowing from a downwardly revised 0.4% growth in February.

- U.K. trade deficit widened to GBP 9.66 billion in March 2026, up from an upwardly revised GBP 5.34 billion in the previous month, marking the largest trade gap since January 2022. Exports rose 0.2% month-on-month to GBP 79.13 billion, while imports grew at a faster pace of 5.3% to a three-month high of GBP 88.78 billion.
- U.K. industrial production fell by 0.2% month-on-month in March 2026, reversing a downwardly revised 0.3% gain in February. On a yearly basis, industrial output stalled, following an upwardly revised 0.5% fall in the previous month.
- U.K. manufacturing production advanced by 1.2% month-on-month in March 2026, rebounding from a revised 0.2% fall in the previous month. On a yearly basis, manufacturing production increased by 1.2% in March, recovering from a revised 0.8% decline in the preceding period.
- Germany's current account surplus narrowed to EUR 23.6 billion in March 2026, down from EUR 27.4 billion a year earlier.

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

Economic News

- Crude Oil traded at US\$ 101.01/bbl (IST 17:00).
- INR weakened to Rs. 95.77 from Rs. 95.71 against each US\$ resulting in daily change of 0.06%.
- India's wholesale prices increased 8.30% year-on-year in April 2026, accelerating sharply from a 3.88% rise in March.
- India's domestic passenger vehicle dispatches from companies to dealers rose 25.4% year-on-year to 4,37,312 units in April this year, as per SIAM. Passenger vehicle dispatches stood at 3,48,847 units in April 2025. Utility vehicles continued to be the volume driver in the PV segment clocking a growth of 21.5% at 2,44,280 units as compared to 2,01,062 units in April last year. Passenger car dispatches also rose by 32.7% at 1,20,945 units last month as compared to 91,148 units in the year-ago period, SIAM said. Sales of vans in the domestic market were at 13,087 units last month as compared to 11,438 units in April 2025, up 14.4%, it added. Total two-wheeler sales rose 28.4% to 18,72,691 units last month as against 14,58,784 units in April last year, it added. Motorcycle sales in April 2026 were up 30.6% at 11,38,452 units as against 8,71,666 units in the year-ago month. Similarly, scooter sales grew by 26.2% at 6,91,993 units last month as compared to 5,48,370 units in the same period last year, SIAM said. Three-wheeler dispatches to dealers were up 32.8% last month at 65,668 units as against 49,441 units in the year-ago period, it added. Overall vehicle wholesales across categories in April grew by 27.9% at 23,16,671 units as compared to 18,11,876 units in the same month last year, SIAM said.
- The MSP hike is the most for moong at 61%, followed by bajra and maize (56% each) and tur (54%). For other crops, it is estimated to be around 50%. The MSP for paddy (rice), the main kharif crop, has been increased by Rs 72 per quintal, taking it to Rs 2,441 for the 'common' variety and Rs 2,461 for 'Grade A'.
- India and Russia are nearing a critical minerals deal. The agreement will cover exploration, processing, and technology for vital resources like lithium and rare earths. This move aims to reduce India's reliance on China. Corporate investments will also be facilitated.

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

Forthcoming Events

Board Meetings as on 15/05/2026

Tata Steel Limited	Financial Results/Dividend
Power Grid Corporation of India Limited	Financial Results/Dividend
ITC Hotels Limited	Financial Results/Dividend
Godfrey Phillips India Limited	Financial Results/Dividend
Godrej Industries Limited	Financial Results/Fund Raising
NHPC Limited	Financial Results/Dividend/Fund Raising
SJVN Limited	Financial Results/Dividend
Cochin Shipyard Limited	Financial Results/Dividend
Aarti Drugs Limited	Financial Results
Aether Industries Limited	Financial Results
Alembic Pharmaceuticals Limited	Financial Results/Dividend
Amber Enterprises India Limited	Financial Results
Arvind Limited	Financial Results/Dividend
Autoline Industries Limited	Financial Results
Azad Engineering Limited	Financial Results
Bajaj Electricals Limited	Financial Results/Dividend/Fund Raising
Balmer Lawrie & Company Limited	Financial Results/Dividend/Buyback/Bonus
Balrampur Chini Mills Limited	Financial Results
Cupid Limited	Financial Results
Deepak Nitrite Limited	Financial Results/Dividend
Devyani International Limited	Financial Results
Emkay Global Financial Services Limited	Financial Results/Dividend/Fund Raising
GIC Housing Finance Limited	Financial Results/Dividend/Fund Raising
Gland Pharma Limited	Financial Results/Dividend
Godawari Power And Ispat limited	Financial Results/Dividend
Greenpanel Industries Limited	Financial Results/Dividend
Hindustan Copper Limited	Financial Results/Dividend/Fund Raising
Jain Irrigation Systems Limited	Financial Results
Kokuyo Camlin Limited	Financial Results/Dividend
Krishna Institute of Medical Sciences Limited	Financial Results
NCC Limited	Financial Results/Dividend
Noida Toll Bridge Company Limited	Financial Results
POWERGRID Infrastructure Investment Trust	Financial Results
Premier Energies Limited	Financial Results/Fund Raising
Rane Holdings Limited	Financial Results/Dividend/Fund Raising
Ratnamani Metals & Tubes Limited	Financial Results/Dividend

S H Kelkar and Company Limited	Financial Results
Satin Creditcare Network Limited	Fund Raising
Solar Industries India Limited	Financial Results/Dividend
Solara Active Pharma Sciences Limited	Financial Results
Somany Ceramics Limited	Financial Results/Dividend
Symphony Limited	Financial Results/Dividend
Thangamayil Jewellery Limited	Financial Results/Dividend
Triveni Engineering & Industries Limited	Financial Results/Dividend
TV Today Network Limited	Financial Results/Dividend
V.S.T Tillers Tractors Limited	Financial Results/Dividend
VIP Industries Limited	Financial Results
Welspun Living Limited	Financial Results/Dividend/Buyback
Wheels India Limited	Financial Results/Dividend
Zuari Agro Chemicals Limited	Financial Results

(Source: NSE)

Board Meetings as on 15/05/2026

State Bank of India	Dividend - Rs 17.35 Per Share
Anand Rathi Wealth Limited	Dividend - Rs 7 Per Share
Aptus Value Housing Finance India Limited	Interim Dividend - Rs 2.50 Per Share
Indian Energy Exchange Limited	Dividend - Rs 2 Per Share
Kennametal India Limited	Interim Dividend - Rs 40 Per Share
Nuvama Wealth Management Limited	Interim Dividend - Rs 14 Per Share
Sarla Performance Fibers Limited	Buy Back

(Source: NSE)

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