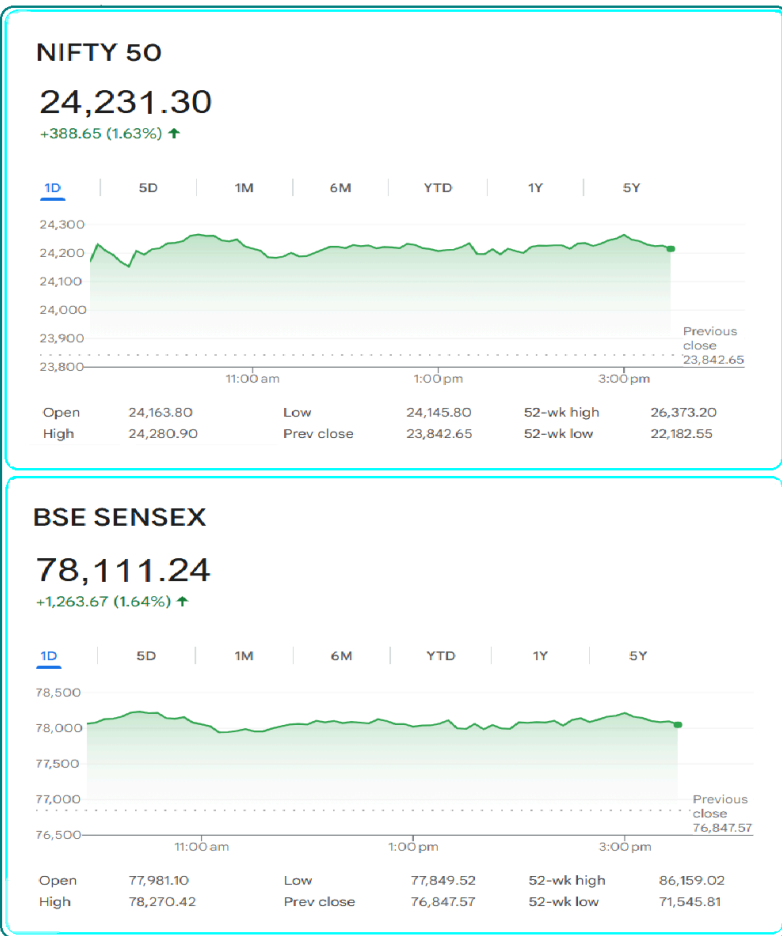


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24231.30	23842.65	1.63%
S&P BSE SENSEX	78111.24	76847.57	1.64%
NIFTY MID100	58777.75	57513.30	2.20%
NIFTY SML100	17156.40	16762.00	2.35%

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

Market Wrap Up

- The headline equity benchmarks ended with strong gains, tracking a rally in global markets and a decline in crude oil prices below the \$100-per-barrel mark. Market sentiment was boosted by renewed hopes of US-Iran peace talks, along with other supportive factors. The Nifty settled above the 24,200 level.
- The S&P BSE Sensex surged 1,263.67 points or 1.64% to 78,111.24. The Nifty 50 index jumped 388.65 points or 1.63% to 24,231.30.
- The BSE 150 MidCap Index soared 2.16% and the BSE 250 SmallCap Index climbed 2.41%.
- Among the sectoral indices, the Nifty Consumer Durables index (up 2.91%), the Nifty IT index (up 2.84%) and the Nifty Realty Index (up 2.56%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (up 1.13%), the Nifty Private Bank index (up 1.23%) and the Nifty FMCG index (up 1.51%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **April** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **901** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **RELIANCE, ITC**.
- **Short** position build up for the **April** series has been witnessed in **OIL, INDIANB, INDUSTOWER**.
- **Unwinding** position for the **April** series has been witnessed in **LT, ONGC, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56301.95	55605.05	1.25%
NIFTY AUTO	26483.10	26084.55	1.53%
NIFTY FMCG	48290.40	47570.40	1.51%
NIFTY IT	31539.75	30669.80	2.84%
NIFTY METAL	12548.00	12329.30	1.77%
NIFTY PHARMA	22435.65	22100.10	1.52%
NIFTY REALTY	776.55	757.20	2.56%
BSE CG	73726.29	71902.80	2.54%
BSE CD	59511.17	57869.78	2.84%
BSE Oil & GAS	26926.59	26348.20	2.20%
BSE POWER	7562.29	7351.57	2.87%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	58134.24	57877.39	0.44%
HANG SENG	25947.32	25872.32	0.29%
STRAITS TIMES	5021.20	5007.57	0.27%
SHANGHAI	4027.21	4026.63	0.01%
KOSPI	6091.39	5967.75	2.07%
JAKARTA	7623.59	7675.95	-0.68%
TAIWAN	36722.14	36296.12	1.17%
KLSE COMPOSITE	1683.42	1688.12	-0.28%
ALL ORDINARIES	9181.10	9165.10	0.17%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	145330.45	129987.55
NSE F&O	154755.02	189463.59

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	666.15
NET SELL	-

(Source: [NSE](#))

Corporate News

- ICICI Prudential Life Insurance Company Ltd's** announced its Q4 FY26 earnings on April 14 where its profit after tax (PAT) surged 578% year-on-year to Rs 609 crore in Q4FY26, compared to Rs 386 crore in the same quarter last year. On the business front, new business received premium grew 30.6% year-on-year to Rs 9,719 crore in Q4FY26, while annualised premium equivalent (APE) stood at Rs 10,641 crore for FY26, registering a growth of 16.4% year-on-year.
- Mahindra & Mahindra** is reportedly in advanced talks to upgrade its South African plant, potentially introducing completely knocked-down (CKD) production. This move aims to capitalize on rising demand for affordable vehicles and sidestep potential import tariffs, enhancing local manufacturing capabilities and competition in the South African market.
- GAIL India Limited** announced an investment of Rs 3,800 crore to establish 700 MW of solar power capacity across Uttar Pradesh and Maharashtra. This initiative includes a 600-MW solar project with battery storage in Jhansi and a 100-MW project in Maharashtra. These projects aim to boost GAIL's renewable energy portfolio and support its net-zero goals.
- ICICI Prudential AMC** reported a stable operational performance for the quarter ended March 31, 2026, as well as the financial year 2026. The revenue from operations rose for the quarter, while profitability improved. For the full financial year FY2026, the topline jumped over 23% year-on-year.
- Nuvoco Vistas Corporation** posted consolidated net profit slipped 14.99% to Rs 140.71 crore in Q4 FY26 as against Rs 165.54 crore in Q4 FY25. However, revenue from operations rose 8.69% year on year (YoY) to Rs 3,306.75 crore in Q4 FY26.
- Just Dial** reported a 36.54% decline in standalone net profit to Rs 100 crore, despite a 6.23% increase in net revenue to Rs 307.24 crore in Q4 FY26 over Q4 FY25.
- H.G. Infra Engineering** has secured a Rs 519.33 crore order from Mirzapur Thermal Energy (UP) for civil and railway infrastructure works at its 2x800 MW thermal

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	4638.00	4427.20	4.76%
ETERNAL	246.67	236.22	4.42%
MAXHEALTH	990.05	951.70	4.03%
POWERGRID	312.45	300.35	4.03%
TMPV	357.90	345.50	3.59%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1217.80	1235.90	-1.46%
BHARTIARTL	1855.70	1870.90	-0.81%
ICICIBANK	1348.10	1351.10	-0.22%

(Source: [Moneycontrol](#))

- **Time Technoplast** said that it has entered a memorandum of understanding (MoU) with the promoters of Systoverse (SPL) for acquiring 76% stake in SPL on a net asset basis.
- **Ramco Systems** announced the go-live of its Aviation Suite at the Engine Maintenance Center of Korean Air.
- **GHV Infra Projects** has secured an engineering, procurement and construction (EPC) contract from Ductor Americas Inc. for a Renewable Natural Gas (RNG) and fertilizer project in the United States. The total contract value stands at approximately \$90.25 million (around Rs 840 crore).
- **TANFAC Industries** announced that it has entered into a memorandum of understanding (MoU) for supply of 5,000 MT per annum of its key fluorinated product with a large multinational company.
- **Hindustan Zinc** has been declared as successful bidder for the Jhandawali - Satipura Amalgamated Potash and Halite Block in Rajasthan via an e-auction conducted by the Ministry of Mines, Government of India.

power project in Mirzapur, Uttar Pradesh.

- **RailTel Corporation of India** has secured a work order worth Rs 43.96 crore from the Uttar Pradesh Police Recruitment and Promotion Board.
- **Elecon Engineering Company** posted consolidated net profit declined 95.90% to Rs 6.00 crore in the quarter ended March 2026 as against Rs 146.48 crore during the previous quarter ended March 2025. Sales declined 6.51% to Rs 745.61 crore in the quarter ended March 2026 as against Rs 797.57 crore during the previous quarter ended March 2025. The Board of Directors of the Company at its meeting held on 15 April 2026, inter alia, have recommended the final dividend of Rs 1.5 per equity Share.
- **Den Networks** reported 38.25% decline in consolidated net profit to Rs 38.39 crore in Q4 FY26 as against Rs 62.18 crore posted in Q4 FY25. Revenue from operations slipped 3.03% year on year to Rs 240.57 crore in the quarter ended 31 March 2026.
- **SRM Contractors** has secured two infrastructure contracts worth a total of Rs 168 crore. The first contract, valued at Rs 128 crore, has been awarded by National Highways Authority of India (NHAI). The second contract, worth Rs 40 crore, has been awarded by the Public Works Department (PWD), Maharashtra.
- **Diamond Power Infrastructure** announced that it has received a letter of intent (LoI) from Adani Electricity Mumbai for the supply of cables worth Rs 45.47 crore.
- **Paras Defence and Space Technologies** signed an agreement with Bandak Aviation Inc. DBA Northstar, USA (Northstar) to supply and support air-to-air refueling systems & accessories.
- **ArisInfra Solutions** signed a memorandum of understanding (MoU) with Capacit'e Infraprojects for the procurement of construction materials worth Rs 800 crore over five years through the ARIS platform.

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

Global News

- China's trade surplus narrowed to \$51.13 billion in March 2026, the smallest since February 2025. Exports rose 2.5% year-on-year to USD 321.03 billion in March 2026 while imports surged 27.8% year-over-year to a record USD 269.9 billion in March 2026.
- U.S. producer prices increased by 0.5% month-over-month in March 2026, matching the previous period's growth. Year-over-year, producer prices rose 4%. The core index edged up 0.2% month-over-month, slower than the 0.5% gains seen in both January and February, and climbed 3.6% year-over-year.
- U.S. private employers added an average of 39,250 jobs per week over the four weeks ending March 28, 2026.
- U.S. existing home sales fell by 3.6% from the previous month to an annualized rate of 3.98 million in March of 2026
- Eurozone industrial production rose by 0.4% month-over-month in February 2026. Year-over-year, industrial activity contracted by 0.6% in February, matching January's pace.
- Germany's wholesale prices surged 4.1% year-on-year in March 2026, accelerating from a 1.2% growth in the prior three months. On a monthly basis, wholesale prices increased 2.7%, picking up from 0.6% in February.
- France's annual inflation accelerated to 1.7% in March 2026 from 0.9% in February. On a monthly basis, the CPI rose 1.0% in March, picking up from 0.6% in February.
- Japan's industrial production dropped 2.0% month-over-month in February 2026, compared with flash data of a 2.1% decline and after a 4.3% growth in the previous month. On an annual basis, output grew 0.4%, slowing from a 0.7% rise in January and pointing to the third straight month of increase.
- Japan's core machinery orders, which exclude volatile sectors such as ships and electric power, increased 13.6% month-over-month to JPY 1,115.9 billion in February 2026, reversing a 5.5% decline in the prior month. On an annual basis, core machinery orders grew 24.7%, accelerating sharply from a 13.7% gain previously.

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

Economic News

- Crude Oil traded at US\$ 91.27/bbl (IST 17:00).
- INR weakened to Rs. 93.39 from Rs. 93.39 against each US\$ resulting in daily change of 0.00%.
- India's wholesale prices increased 3.88% yoy in March 2026, accelerating from a 2.13% rise in February. Monthly, wholesale prices rose 1.64%, accelerating from 0.38% in February.
- India's trade deficit shrank to \$20.67 billion in March 2026, down from \$27.1 billion in February and \$21.69 billion a year earlier. Exports rose to \$38.92 billion, up from \$36.61 billion in February, while imports fell to \$59.59 billion, down from

\$63.71 billion.

- India's passenger vehicle sales in India climbed 14.1% year-on-year in March 2026, accelerating from a 10.6% increase in the previous month to 376,268 units and marking the highest sales ever in the financial year 2025-26.
- India has received Iranian oil shipments. This marks the first imports in seven years. The nation is securing volumes before a US grace period ends. Tankers are discharging crude on India's east and west coasts. This move aims to manage global energy flow disruptions. India is leveraging waivers for previously restricted oil.

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

Forthcoming Events

Board Meetings as on 16/04/2026

Wipro Limited	Financial Results/Buy Back
HDFC Asset Management Company Limited	Financial Results/Dividend
HDFC Life Insurance Company Limited	Financial Results/Dividend
Angel One Limited	Financial Results
CRISIL Limited	Financial Results/Dividend
Alok Industries Limited	Financial Results
SG Finserve Limited	Financial Results
VST Industries Limited	Financial Results/Dividend
Waaree Renewable Technologies Limited	Financial Results

(Source: NSE)

Corporate Actions as on 16/04/2026

Energy Infrastructure Trust	Income Distribution (InvIT)
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(Source: NSE)

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