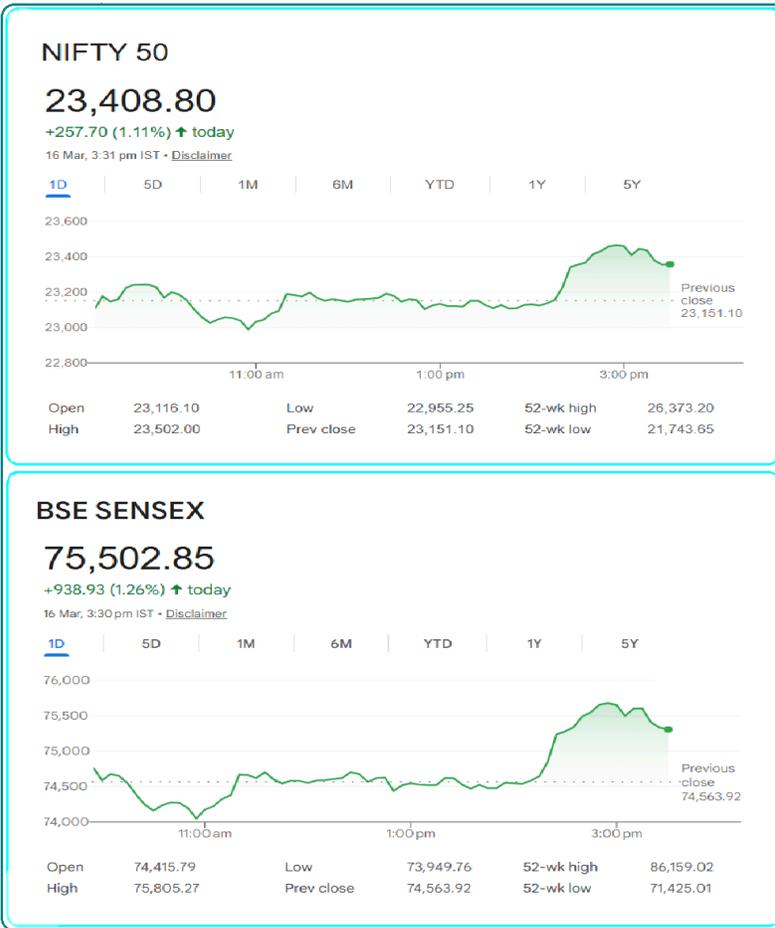


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23408.80	23151.10	1.11%
S&P BSE SENSEX	75502.85	74563.92	1.26%
NIFTY MID100	54614.95	54761.10	-0.27%
NIFTY SML100	15810.35	15895.25	-0.53%

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

Market Wrap Up

- The domestic equity indices ended with major gains, supported by value buying at lower levels as investors assessed the potential fallout of the ongoing U.S.-Iran conflict. Sentiment improved after the Trump administration assured safe transit for ships through the Strait of Hormuz, easing concerns over potential disruptions to global oil supplies. However, the overall mood remained cautious amid persistent FII outflows and elevated crude oil prices due to the ongoing Iran-Israel-U.S. tensions. The Nifty ended above the 23,400 level. The S&P BSE Sensex jumped 938.93 points or 1.26% to 75,502.85. The Nifty 50 index rose 257.70 points or 1.11% to 23,408.80. In the past three consecutive trading sessions, the Sensex dropped 4.65% while the Nifty fell 4.57%. The BSE 150 MidCap Index added 0.42% and the BSE 250 SmallCap Index shed 0.47%. Among the sectoral indices, the Nifty Auto index (up 1.67%), the Nifty Financial services index (up 1.36%) and the Nifty Private Bank index (up 1.24%) outperformed the Nifty 50 index. Meanwhile, the Nifty Oil & Gas index (down 1.58%), Nifty Realty index (down 1.57%) and the Nifty Healthcare index (down 1.37%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **March** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **17008** contracts at the end of the day.
- Long** position build up for the **March** series has been witnessed in **RELIANCE**, **LT**, **SBIN**, **ICICIBANK**, **HDFCBANK**.
- Short** position build up for the **March** series has been witnessed in **BHARTIARTL**, **INFY**.
- Unwinding** position for the **March** series has been witnessed in **UPL**, **CGPOWER**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54413.40	53757.85	1.22%
NIFTY AUTO	24599.10	24195.10	1.67%
NIFTY FMCG	48468.85	47924.15	1.14%
NIFTY IT	29042.55	29071.25	-0.10%
NIFTY METAL	11318.00	11292.50	0.23%
NIFTY PHARMA	22547.20	22832.20	-1.25%
NIFTY REALTY	698.65	709.80	-1.57%
BSE CG	67007.19	67620.20	-0.91%
BSE CD	55121.62	55011.77	0.20%
BSE Oil & GAS	26247.60	26864.10	-2.29%
BSE POWER	6881.03	6922.20	-0.59%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	53751.15	53819.61	-0.13%
HANG SENG	25834.02	25465.60	1.45%
STRAITS TIMES	4868.69	4842.27	0.55%
SHANGHAI	4084.79	4095.45	-0.26%
KOSPI	5549.85	5487.24	1.14%
JAKARTA	7022.29	7137.21	-1.61%
TAIWAN	33342.51	33400.32	-0.17%
KLSE COMPOSITE	1696.56	1698.85	-0.13%
ALL ORDINARIES	8793.40	8839.10	-0.52%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	124924.28	121547.53
NSE F&O	255272.26	246986.86

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	9365.52

(Source: [NSE](#))

Corporate News

- **Glenmark Pharmaceuticals's** US arm, Glenmark Pharmaceuticals Inc., will launch Potassium Phosphates Injection USP in multiple strengths in the US market. The injection will be available in 15 mmol P / 22 mEq K per 5 mL and 45 mmol P / 66 mEq K per 15 mL single-dose vials, as well as 150 mmol P / 220 mEq K per 50 mL pharmacy bulk package vials.
- **IndiGo** has partnered with Adani Airport Holdings Ltd (AAHL) to allow members of its loyalty programme, IndiGo BluChip, to earn reward points on duty-free purchases at airports managed by the Adani Group.
- **Mankind Pharma** is set to enter India's semaglutide market soon. The drug's patent expires this month, opening doors for new players. Mankind Pharma plans to offer the medication at affordable prices. This move aims to improve patient access to this important therapy. The company sees a significant opportunity as semaglutide's use extends beyond diabetes to other health areas.
- **Vodafone Idea** is actively engaging with various investors, notably ST Telemedia and JSW Group, to explore a potential equity partnership. Following a recent financial boost from the Indian government, the company is eager to attract strategic backers who can provide much-needed capital for its ambitious 5G rollout.
- **Ramco Systems** announced that it has signed a Memorandum of Understanding (MOU) with Anna University, Chennai to establish a dedicated ERP Lab for the University's Industrial Engineering programme. The MOU outlines a structured framework that includes faculty enablement, industry-oriented training, skill development and provision for research and academic events, giving students practical exposure to the enterprise systems widely used by modern manufacturing organizations.
- **Mahindra EPC Irrigation** said it has received an order from the Office of the Assistant Engineer, Water User Association, for the supply of pressurized Micro Irrigation Systems covering 3,591 hectares. The contract, valued at approximately Rs 17.95 crore.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ULTRACEMCO	11099.00	10616.00	4.55%
M&M	3036.10	2931.10	3.58%
GRASIM	2654.40	2568.60	3.34%
TRENT	3596.10	3487.80	3.11%
ETERNAL	222.04	215.68	2.95%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
BEL	429.50	439.40	-2.25%
MAXHEALTH	970.60	990.00	-1.96%
COALINDIA	460.30	467.00	-1.43%
ONGC	260.45	264.10	-1.38%
WIPRO	195.11	197.58	-1.25%

(Source: [Moneycontrol](#))

- LTIMindtree** announced a partnership with the Indian Institute of Technology Kharagpur (IIT Kharagpur) to design deep-dive training programs aimed at enhancing the company's workforce skills in Artificial Intelligence (AI) and related technologies.
- Zyus Lifesciences** said its Desidustat tablets, licensed to a subsidiary of China Medical System Holdings (CMS), have been approved in China for treating renal anaemia by the National Medical Products Administration (NMPA).
- Alkem Laboratories** announced that it has received a Certificate of GMP (Good Manufacturing Practice) Compliance of a Manufacturer from the Department of Pharmacy (Human Medicines), Germany for its manufacturing facility located in Baddi, India.
- SEAMEC** said a consortium comprising SEAMEC and Supreme Hydro Engineering has received a notification of award from Oil and Natural Gas Corporation (ONGC) for operation and maintenance services of the vessel Samudra Sevak. The total contract value is estimated at around Rs 410.74 crore.
- Tejas Networks** announced that it has received a purchase order to supply its 4G radio access network (RAN) solutions for a mobile network expansion project in South Asia.
- Bajel Projects** secured a Rs 700 crore order from the Maharashtra State Electricity Transmission Company (MSETCL).
- Ceigall India** in joint venture with Rajinder Infrastructure has secured a project worth Rs 274.08 crore from Ministry of Road Transport and Highways for construction of road from km 17.812 to km 55.377 (Package-2) of Bile- Migging section (km 0.00 at Migging end) of NH913 (Frontier Highway) to Intermediate Lane on EPC mode in the State of Arunachal Pradesh.
- Adani Power** said that it has received a Letter of Award from Maharashtra State Electricity Distribution Company for the long-term supply of 1,600 MW of thermal power under a power supply agreement (PSA).
- Data Patterns (India)** announced that it has received a contract worth Rs 279 crore for supply of 34 units of Doppler Weather Radars to Indian Metrological Department (IMD).
- Newgen Software Technologies** announced that its Dubai-based subsidiary, Newgen Software Technologies L.L.C, has secured a contract worth \$2.22 million (approximately Rs 20.54 crore) from a leading bank in Kuwait.
- Lloyds Metals and Energy** said that it has commenced commercial production of copper cathodes from its 12,000 tonnes per annum copper processing plant located in the Katanga Copper Belt in the Democratic Republic of Congo.

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

Global News

- China's retail sales rose 2.8% year-on-year in the first two months of 2026, accelerating from a 0.9% gain in December. Retail sales increased 0.81% in February of 2026 over the previous month.
- China's industrial production rose 6.3% yoy in the combined January-February period of 2026, accelerating from a 5.2% growth in December. Monthly, industrial output increased 0.83%. In 2025, production grew 5.9%.
- China's fixed-asset investment increased by 1.8% in the January-February 2026 period, this followed a 3.8% drop in 2025. On a monthly basis, fixed-asset investment rose by 0.4% in February, slowing from a 1.3% increase in January.
- China's unemployment rate rose to 5.3% in February 2026 from 5.2% in the previous month.
- China's new home prices dropped 3.2% year-on-year in February 2026, following a 3.1% decline in the previous month. Monthly, new home prices dipped 0.3%, after a 0.4% fall in the prior three months.
- China's banks extended CNY 900 billion in new loans in February of 2026, slowing from the 1,009 billion in new loans from the corresponding period of the previous year. Still, aggregate financing, a broad measure of credit in the economy edged higher to CNY 2.38 trillion from CNY 2.23 trillion last year. The value of loans in China increased 6% in February of 2026 over the same month in the previous year. Money supply (M2) rose 9.0% year-on-year to a record CNY 347.19 trillion in January 2026, from CNY 340.29 trillion in December 2025.
- U.S. economy expanded an annualized 0.7% in Q4 2025, the weakest performance since a contraction in the first quarter of 2025.
- U.S. durable goods were flat month-over-month in January 2026, following a downwardly revised 0.9% decrease in December. Core durable goods orders went up by 0.4%, after an upwardly revised 1.3% increase in December.
- U.S. consumer sentiment Index fell to 55.5 in March 2026, down from 56.6 in February.
- U.K. Rightmove house asking prices rose 0.8% in March, adding just over GBP 3,000 to reach an average of GBP 371,042. However, prices remained 0.2%, or GBP 744, lower than the same period last year.
- Germany's current account surplus widened to EUR 17.1 billion in January 2026, up from EUR 16.6 billion a year earlier.

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

Economic News

- Crude Oil traded at US\$ 97.36/bbl (IST 17:00).
- INR strengthened to Rs. 92.43 from Rs. 92.46 against each US\$ resulting in daily change of 0.03%.
- India's wholesale prices rose 2.13% year-on-year in February 2026, accelerating from a 1.81% increase in January. On a monthly basis, wholesale prices rose 0.25%, easing from a revised 0.38% increase in January.
- India's merchandise trade deficit widened to \$27.10 billion in February 2026, compared with \$14.42 billion in the same month last year, with exports at \$36.61 billion and imports at \$63.71 billion.
- Indian mills produced 26.18 million metric tons of sugar between October 1 and March 15, up 10.4% from the previous year.

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

Forthcoming Events

Board Meetings as on 17/03/2026

Power Finance Corporation Limited	Dividend/Fund Raising
Clean Max Enviro Energy Solutions Limited	Financial Results
Five-Star Business Finance Limited	Fund Raising
India Glycols Limited	Dividend
Lotus Eye Hospital and Institute Limited	Voluntary Delisting

(Source: NSE)

Corporate Actions as on 17/03/2026

5Paisa Capital Limited	Rights 1:2 @ Premium Rs 290/-
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(Source: NSE)

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