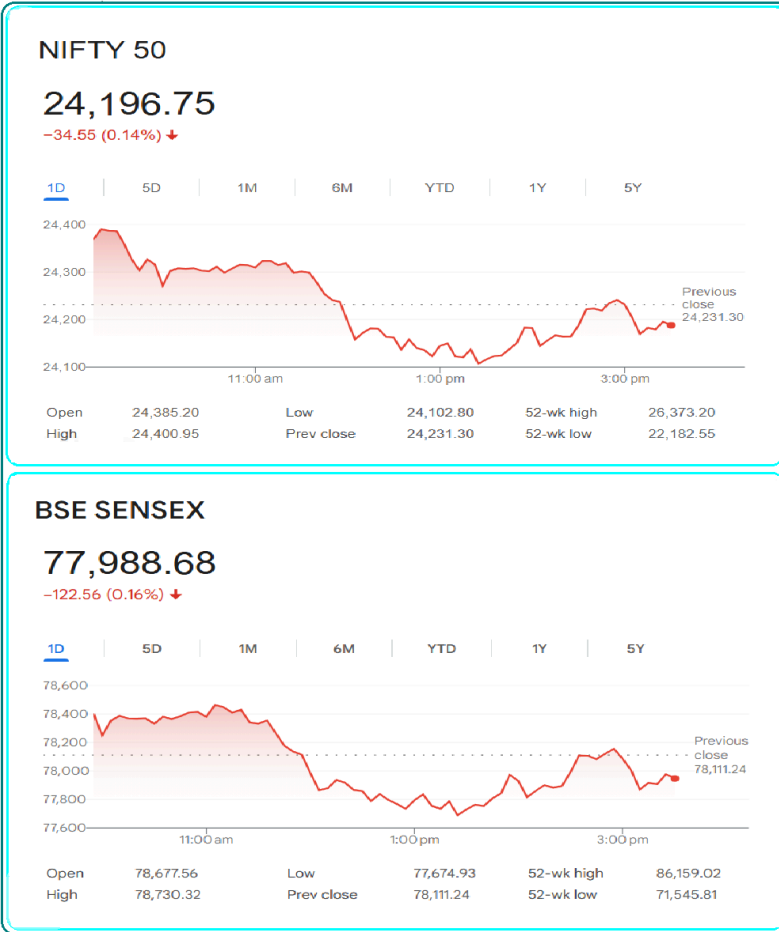


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24196.75	24231.30	<b>-0.14%</b>
<b>S&amp;P BSE SENSEX</b>	77988.68	78111.24	<b>-0.16%</b>
<b>NIFTY MID100</b>	59146.75	58777.75	<b>0.63%</b>
<b>NIFTY SML100</b>	17308.85	17156.40	<b>0.89%</b>

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

## Market Wrap Up

- The headline equity indices ended with moderate losses amid heightened volatility. The Nifty 50 opened at 24,385.20 and traded positively in the early hours; however, gains were erased by the afternoon session, with the market slipping into negative territory and closing below the 24,200 mark. Volatility remained elevated, largely due to the weekly expiry of Sensex derivatives and the ongoing Q4 earnings season. Market participants also kept a close watch on global cues, particularly developments related to de-escalation between Iran and the United States. The S&P BSE Sensex declined 122.56 points or 0.16% to 77,988.68. The Nifty 50 index fell 34.55 points or 0.14% to 24,196.75. The BSE 150 MidCap Index jumped 0.52% and the BSE 250 SmallCap Index rose 0.99%. Among the sectoral indices, the Nifty Metal index (up 1.53%), the Nifty IT index (up 0.88%) and the Nifty Media Index (up 0.59%) outperformed the Nifty 50 index. Meanwhile, the Nifty Private Bank index (down 0.56%), Nifty Auto index (down 0.38%) and the Nifty PSU Bank index (down 0.17%) 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 **1421** contracts at the end of the day.
- Long** position build up for the **April** series has been witnessed in **RELIANCE, BHEL, ITC, ETERNAL**.
- Short** position build up for the **April** series has been witnessed in **BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- Unwinding** position for the **April** series has been witnessed in **INFY, MARICO**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56086.40	56301.95	-0.38%
NIFTY AUTO	26382.75	26483.10	-0.38%
NIFTY FMCG	48377.90	48290.40	0.18%
NIFTY IT	31817.50	31539.75	0.88%
NIFTY METAL	12740.20	12548.00	1.53%
NIFTY PHARMA	22465.00	22435.65	0.13%
NIFTY REALTY	779.55	776.55	0.39%
BSE CG	74479.85	73726.29	1.02%
BSE CD	59689.46	59511.17	0.30%
BSE Oil & GAS	26861.11	26926.59	-0.24%
BSE POWER	7631.59	7562.29	0.92%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	59518.34	58134.24	2.38%
HANG SENG	26394.26	25947.32	1.72%
STRAITS TIMES	5007.83	5021.20	-0.27%
SHANGHAI	4055.55	4027.21	0.70%
KOSPI	6226.05	6091.39	2.21%
JAKARTA	7621.38	7623.59	-0.03%
TAIWAN	37132.02	36722.14	1.12%
KLSE COMPOSITE	1689.71	1683.42	0.37%
ALL ORDINARIES	9173.60	9181.10	-0.08%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	152709.34	145330.45
NSE F&O	159253.90	154755.02

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	382.36
NET SELL	-

(Source: [NSE](#))

## Corporate News

- **Wipro** reported its financial results for the fourth quarter, with net profit rising 12.3% sequentially to Rs 3,502 crore.
- **ICICI Lombard General Insurance Company** reported a profit after tax (PAT) for Q4 FY26 rose 7.3% to Rs 547 crore, compared to Rs 510 crore in the same quarter last year. On a reported basis, PAT stood at Rs 539 crore, up 15.6% year-on-year.
- **HDFC Asset Management Company** posted a net profit of Rs 623.3 crore for the fourth quarter. Revenue also came in below expectations at Rs 1,051 crore, compared with the poll estimate of Rs 1,056 crore. The company has recommended a Final Dividend of Rs.54 per share.
- **HDB Financial** posted net profit rose 41% to Rs 751 crore for the quarter ended March 31, from Rs 531 crore a year earlier. The firm's interest income rose 13% to Rs 4,081 crore in Q4FY26 as against Rs 3,623 crore in the year-ago period. The NBFC declared Rs 2 dividend.
- **Tejas Networks** reported a net loss of Rs 211 crore in Q4 FY26 as against a net loss of Rs 72 crore in Q4 FY25. Net revenue fell 83% to Rs 333 crore in the March quarter from Rs 1,907 crore recorded in the same period last year.
- **Ashok Leyland** has launched twin-fuel variants of its Dost and Dost+ XL light commercial vehicles, powered by both CNG and petrol. This dual-fuel system offers operators flexibility, lower operating costs, and reduced emissions by allowing a switch to petrol as a backup. The vehicles aim to address range limitations and fuel availability concerns for LCVs.
- **ReNew Energy Global Plc** achieved a record 2.4 GW of new renewable energy capacity in FY2026. This brings their total operating capacity to 12.6 GW, making them the second largest in India. The company also has significant solar manufacturing capabilities. This marks a significant milestone for ReNew's growth in the renewable energy sector.
- **Alembic Pharmaceuticals** has received final approval from the US Food and Drug Administration for its generic methotrexate injection, used to treat multiple cancers and arthritis conditions.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	1039.90	1011.45	2.81%
ADANIENT	2203.70	2144.40	2.77%
TRENT	4083.30	3978.20	2.64%
ADANIPOINTS	1549.80	1511.80	2.51%
ETERNAL	252.70	246.67	2.44%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HDFCBANK	795.45	809.90	-1.78%
ONGC	282.75	287.60	-1.69%
HDFCLIFE	631.50	640.45	-1.40%
TITAN	4461.40	4522.20	-1.34%
APOLLOHOSP	7553.00	7642.00	-1.16%

(Source: [Moneycontrol](#))

- **Dr Reddy's Labs** has received the final approval from India's drug regulator to manufacture and sell generic versions of semaglutide tablets, a popular weight-loss and anti-diabetes drug, even as innovator Novo Nordisk battles Indian drugmakers over alleged patent infringement.
- **DCM Shriram** said that the company and Shriram Polytech (SPL) have entered into an agreement with Teknor Apex B.V. for transferring 50% equity stake held by the company in SPL to Teknor, for a cash consideration of \$5.6 million.
- **Pace Digitek** along with its subsidiaries, reported robust order inflows of Rs 6,459.7 crore for FY2026, driven by strong momentum in its energy business.
- **Container Corporation of India** has bagged a contract from Braithwaite & Co for manufacture and supply of nine BLSS (spine car) rakes on a turnkey basis. The order is valued at Rs 175.36 crore and is a domestic contract.
- **Enviro Infra Engineers** announced a strong inflow of new orders worth over Rs 2,240 crore since March 2026, significantly strengthening its order book and revenue visibility for the next 15-24 months.
- **RailTel Corporation of India** has received a letter of intent (LoI) worth Rs 100 crore from the Divisional Commissioner, Konkan Division.
- **Elitecon International** announced that it has secured a long-term supply contract for cigarettes and other tobacco-related products, aggregating to Rs 2.02 billion.
- **GHV Infra Projects** announced that it has secured a construction contract from APCO Infratech for road construction and other miscellaneous civil works in Maharashtra. The contract consideration stands at Rs 815 crore (excluding taxes) and the construction period is 30 months.

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

## Global News

- China's GDP grew 1.3% qoq in Q1 2026, following a 1.2% increase in Q4. The economy expanded 5.0% yoy in Q1 2026, accelerating from 4.5% in Q4.
- China's retail sales rose 1.7% year-on-year in March 2026, slowing from a 2.8% increase in the January-February period. On a monthly basis, retail sales increased 0.2%, easing from a 0.5% rise in February.
- China's industrial production grew 5.7% yoy in March 2026, surpassing market expectations of 5.5% but slowing from a 6.3% rise in the combined January-February period. Monthly, industrial output grew 0.28%. For Q1, industrial output rose 6.1%.
- China's fixed-asset investment rose by 1.7% year-on-year in the first quarter of 2026. On a monthly basis, fixed-asset

investment increased by 0.52% in March, slowing from a 0.99% rise in February.

- China's unemployment rate rose to 5.4% in March 2026 from 5.3% in the previous month.
- China's house prices across 70 cities fell 3.4% year-on-year in March 2026, widening from a 3.2% decline in the previous month. Monthly, new home prices fell 0.2%, after a 0.3% decrease in February.
- U.S. export prices rose by 1.6% month-over-month in March 2026, easing from an upwardly revised 1.9% advance in February. The import prices increased by 0.8% month-over-month in March 2026, following a downwardly revised 0.9% rise in February.
- U.K. GDP expanded 0.5% month-on-month in February 2026, compared to January's revised 0.1% growth. On a yearly basis, GDP expanded 1.0%, the strongest growth since September last year.
- U.K. posted a trade deficit of GBP 0.72 billion in February 2026, shifting from a downwardly revised surplus of GBP 3.02 billion in the previous month.
- U.K. industrial production rose 0.5% month-on-month in February 2026, rebounding from a 0.1% fall in January. . On an annual basis, industrial activity decreased by 0.4%, reversing an upwardly revised 0.5% gain.
- U.K. manufacturing production edged down 0.1% month-on-month in February 2026, reversing an upwardly revised 0.2% gain in January. On a yearly basis, manufacturing output fell 0.5%, reversing a 1.3% growth in January.
- Eurozone annual inflation rate was revised higher to 2.6% in March 2026, the highest level since July 2024, up from a preliminary estimate of 2.5% and accelerating from 1.9% in February. Compared to the previous month, the CPI jumped 1.3%, the most since October 2022.
- Australia's seasonally adjusted unemployment rate stood at 4.3% in March 2026, unchanged from February. The employment rose by 17,900 to 14.77 million, following an upwardly revised gain of 49,600 in February.

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

## Economic News

- Crude Oil traded at US\$ 91.43/bbl (IST 17:00).
- INR strengthened to Rs. 93.21 from Rs. 93.39 against each US\$ resulting in daily change of 0.19%.
- India's unemployment rate increased to 5.1% in March 2026, up from 4.9% in February, matching market expectations and marking the highest level since October 2025.
- Wheat procurement will decline 69% in the 2026-27 marketing year due to late arrival of grains in mandis or wholesale markets.
- India's electronics imports surged past 100 billion US dollars in 2025-26. This marks a significant increase from the previous fiscal year. Despite a manufacturing push, the country remains reliant on imported components. Electronics exports also saw growth, driven by smartphone shipments, but imports continue to outpace them.

- The sugar production reached 274.8 lakh tons, compared to 254.96 lakh tons on the corresponding date last year, i.e. around 8% higher, as of 15 April 2026 (SS 2025-26). A total of 19 factories are currently operational, versus 38 mills operating at the same time last year, said a statement by the Indian Sugar and Bio-energy Manufacturers Association (ISMA).

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

## Forthcoming Events

### Board Meetings as on 16/04/2026

Jio Financial Services Limited	Financial Results/Dividend
Bajaj Consumer Care Limited	Financial Results
Aditya Birla Money Limited	Financial Results
Hathway Cable & Datacom Limited	Financial Results
Mastek Limited	Financial Results/Dividend

(Source: NSE)

### Corporate Actions as on 16/04/2026

Aurobindo Pharma Limited	Buy Back
Muthoot Finance Limited	Interim Dividend - Rs 30 Per Share

(Source: NSE)

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