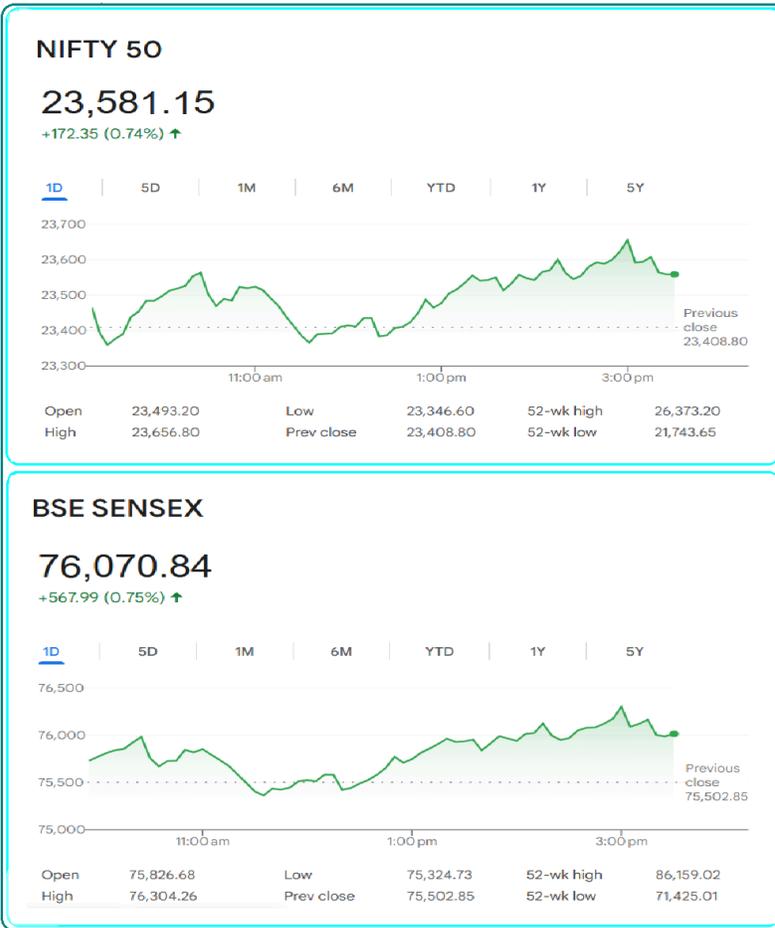


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23581.15	23408.80	0.74%
S&P BSE SENSEX	76070.84	75502.85	0.75%
NIFTY MID100	55174.40	54614.95	1.02%
NIFTY SML100	15912.90	15810.35	0.65%

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

Market Wrap Up

- Domestic equity indices ended with significant gains, extending their rally for the second consecutive day, tracking positive cues from global markets. The upmove was primarily driven by buying in auto and metal stocks. However, overall sentiment remained cautious amid ongoing concerns over the US-Iran conflict in the Middle East and elevated crude oil prices, which continue to weigh on investor confidence. Despite these headwinds, value buying at lower levels helped markets sustain gains and close in positive territory. The Nifty settles above the 23,550 mark. The S&P BSE Sensex jumped 567.99 points or 0.75% to 76,070.84. The Nifty 50 index rose 172.35 points or 0.74% to 23,581.15. In the two consecutive trading sessions, the Sensex and Nifty jumped 2.02% and 1.86%, respectively. The BSE 150 MidCap Index added 1.08% and the BSE 250 SmallCap Index rose 0.43%. Among the sectoral indices, the Nifty Metal index (up 2.82%), the Nifty Auto index (up 2.11%) and the Nifty Realty index (up 1.80%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 0.97%), Nifty FMCG index (down 0.75%) and the Nifty Oil & Gas index (up 0.17%) 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 **1552** contracts at the end of the day.
- Long** position build up for the **March** series has been witnessed in **RELIANCE, LT, BHARTIARTL, ICICIBANK, HDFCBANK**.
- Short** position build up for the **March** series has been witnessed in **SBIN, BAJFINANCE, INFY**.
- Unwinding** position for the **March** series has been witnessed in **VEDL, WIPRO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54876.00	54413.40	0.85%
NIFTY AUTO	25117.10	24599.10	2.11%
NIFTY FMCG	48104.45	48468.85	-0.75%
NIFTY IT	28760.90	29042.55	-0.97%
NIFTY METAL	11637.35	11318.00	2.82%
NIFTY PHARMA	22597.55	22547.20	0.22%
NIFTY REALTY	711.25	698.65	1.80%
BSE CG	67943.61	67007.19	1.40%
BSE CD	55509.82	55121.62	0.70%
BSE Oil & GAS	26278.18	26247.60	0.12%
BSE POWER	6944.51	6881.03	0.92%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	53700.39	53751.15	-0.09%
HANG SENG	25868.54	25834.02	0.13%
STRAITS TIMES	4935.97	4868.69	1.38%
SHANGHAI	4049.91	4084.79	-0.85%
KOSPI	5640.48	5549.85	1.63%
JAKARTA	7106.84	7022.29	1.20%
TAIWAN	33836.57	33342.51	1.48%
KLSE COMPOSITE	1710.99	1696.56	0.85%
ALL ORDINARIES	8819.40	8793.40	0.30%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	107083.39	124924.28
NSE F&O	226125.88	255272.26

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4741.22

(Source: [NSE](#))

Corporate News

- Tata Motors** announced a price hike across its commercial vehicle (CV) portfolio, effective from 1 April 2026. The company said that prices will be increase by up to 1.5% in order to partially offset the impact of rising commodity prices and other input costs. The increase will vary depending on the model and variant.
- Reliance Industries** announced that it has entered into a binding long-term supply and purchase agreement with Samsung C&T Corporation, South Korea, for the supply of green ammonia over a 15-year period starting in the second half of FY2029.
- Zydu Lifesciences** and **Lupin** have joined forces to bring Semaglutide Injection to India. This medication helps manage type 2 diabetes and aids in chronic weight management. This collaboration aims to provide advanced therapies for metabolic disorders across the nation.
- Maruti Suzuki** plans seven new SUV launches in the coming years. This expansion aims to capitalize on the growing demand for SUVs in India. Recent models like the e-Vitara and Victoris have boosted sales. Maruti Suzuki is actively increasing its presence in this popular segment.
- Bharat Electronics** has secured additional orders worth Rs.1,011 crore since the last disclosure on 25 February 2026. Major orders received include communication equipment, radar warning and jamming system, fire control system, electro optic sight, fire detection & warning system for fighter aircraft, high energy laser, automatic train supervision system, head up display, software solutions, jammers, shelters, strategic components, upgrades, spares, services etc.
- Texmaco Rail & Engineering** announced that Western Railway has awarded an order of Rs. 3.54 crore for provision of Anti-Bird disc on insulators in electrified territory of Vadodara Division.
- Mastek** said that its wholly owned subsidiary, Mastek UK, has secured a two-year contract with the UK's Financial Conduct Authority (FCA), valued at euro 15 million to support the client's Digital Delivery Hub (DDH).

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	234.63	222.04	5.67%
TATASTEEL	195.43	186.94	4.54%
M&M	3128.90	3036.10	3.06%
HDFCLIFE	642.30	626.00	2.60%
BEL	439.35	429.50	2.29%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
WIPRO	191.32	195.11	-1.94%
CIPLA	1281.90	1300.00	-1.39%
INFY	1232.90	1249.80	-1.35%
TATACONSUM	1078.00	1092.70	-1.35%
ITC	304.85	308.25	-1.10%

(Source: [Moneycontrol](#))

- Puravankara** said that its subsidiary, Starworth Infrastructure & Construction has secured a construction contract worth Rs 280.35 crore from Vellore Institute of Technology for the development of an academic facility at its Vellore campus.
- Prostarm Info Systems** announced that it has been declared the L1 (lowest) bidder by West Bengal Medical Services Corporation (WBMSC), Kolkata, for a contract valued at Rs 90.44 crore.
- Time Technoplast** said that it has secured an order worth approximately Rs 115.56 crore from a well-established PSU for the supply of Type IV cylinders - Mobile Storage Cascades - for CNG and CGD networks.
- Kalpataru Projects International** announced that it, along with its subsidiaries, has secured new orders and notifications of award worth approximately Rs 2,471 crore across multiple business segments.
- Power Mech Projects** has secured an order worth Rs 709.56 crore from Adani Infrastructure Management Services, a part of the Adani Group, for operations and maintenance services at a thermal power plant in Maharashtra.
- Oberoi Realty** said that it has entered into a development agreement for lands situate at Aram Nagar, Versova, Andheri West, Mumbai.
- L&T Technology Services** announced the launch of an AI-powered digital twin platform for lung navigation, surgical planning and respiratory diagnostics to enable greater precision and improve clinical results.
- Power Finance Corporation** has recommended the Fourth Interim dividend of Rs 3.25 per equity Share.
- Sun Pharmaceutical Industries** said that the US Food and Drug Administration (FDA) has accepted for review the supplemental Biologics License Application (sBLA) for ILUMYA (tildrakizumab) for the treatment of adults with active psoriatic arthritis.
- NMDC** said that it has entered into a non-binding MoU with **Gujarat Mineral Development Corporation** to explore collaboration in the development of rare earth elements (REE) and associated minerals.
- RailTel Corporation of India** said it has received a work order worth Rs 42.63 crore from National Informatics Centre Services Incorporated.
- Rail Vikas Nigam** announced that it has received a Letter of Award (LoA) worth Rs 95.27 crore from National Mineral Development Corporation (NMDC) for the refurbishment of railway tracks.

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

Global News

- U.S. industrial production increased 0.2% month-over-month in February 2026, after moving up 0.7% in January.
- U.S. manufacturing output rose 0.2% month-over-month in February 2026, more than market expectations of 0.1% and after moving up 0.8% in January.
- Eurozone ZEW Indicator of Economic Sentiment fell sharply by 47.9 points from the previous month to -8.5 in March 2026. The current economic situation declined by 16.3 points to -29.9, and inflation expectations surged by 78.9 points to 79.
- Germany's ZEW Indicator of Economic Sentiment plummeted by 58.8 points to -0.5 in March 2026, down from 58.3 in February. The assessment of the current economic situation strengthened, with the index climbing 3.0 points to -62.9, surpassing expectations of -67.3.
- The Reserve Bank of Australia raised its cash rate by 25bps to 4.1% at its March 2026 meeting, following a hike in February.

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

Economic News

- Crude Oil traded at US\$ 95.61/bbl (IST 17:00).
- INR strengthened to Rs. 92.38 from Rs. 92.43 against each US\$ resulting in daily change of 0.08%.
- India's unemployment rate eased slightly to 4.9% in February from 5% in January.
- Cooking gas LPG use in India dropped significantly in the first half of March. Supply disruptions from West Asia caused this steep decline. LPG consumption fell by 17.7% compared to last year. LPG consumption fell to 1.147 million tonne during the first fortnight of March, 17.3% lower than 1.387 million tonne consumed in the same period last year and 26.3% lower than 1.557 million tonne demand in the first half of February.
- The WTO landscape is heating up as India encounters objections from the US, Australia, Paraguay, and Ukraine regarding its agricultural support practices. These nations contend that India's reported market price support for rice and wheat is misleadingly low, pointing to substantial discrepancies.
- India-US trade deal signing is contingent on a new tariff framework, with discussions ongoing regarding non-tariff barriers and Section 232 tariffs. The agreement will also address US Section 301 tariffs, with finalization awaiting Washington's restoration of global tariff architecture post-Supreme Court ruling.

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

Forthcoming Events

Board Meetings as on 18/03/2026

Bajaj Healthcare Limited	Fund Raising
Dishman Carbogen Amcis Limited	Fund Raising
Gaudium IVF and Women Health Limited	Financial Results

(Source: NSE)

Corporate Actions as on 18/03/2026

Banco Products (I) Limited	Interim Dividend - Rs 8 Per Share
Mishra Dhatu Nigam Limited	Interim Dividend - Re 0.85 Per Share

(Source: NSE)

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