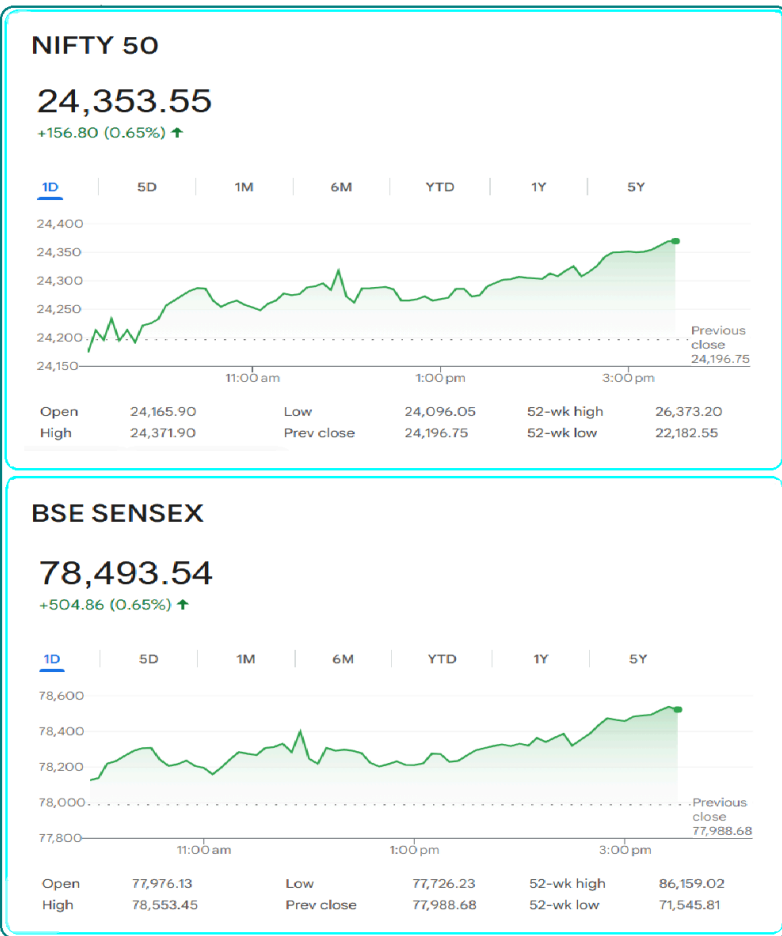


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24353.55	24196.75	0.65%
S&P BSE SENSEX	78493.54	77988.68	0.65%
NIFTY MID100	59898.20	59146.75	1.27%
NIFTY SML100	17565.70	17308.85	1.48%

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

Market Wrap Up

- Domestic equity benchmarks ended on a positive note, primarily driven by stock-specific momentum and improving sentiment around Q4 earnings, with the broader market outperforming the benchmarks. Easing crude oil prices also supported investor sentiment. The Nifty 50 settled above the 24,350 level.
- The S&P BSE Sensex jumped 504.86 points or 0.65% to 78,493.54. The Nifty 50 index advanced 156.80 points or 0.65% to 24,353.55.
- The BSE 150 MidCap Index rallied 1.26% and the BSE 250 SmallCap Index surged 1.52%.
- Among the sectoral indices, the Nifty FMCG index (up 2.65%), the Nifty Oil & Gas index (up 1.38%) and the Nifty Media Index (up 1.34%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 0.02%), Nifty Pharma index (up 0.14%) and the Nifty Healthcare index (up 0.41%) the 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 **1596** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **April** series has been witnessed in **HCLTECH, WIPRO**.
- **Unwinding** position for the **April** series has been witnessed in **COALINDIA, BANKINDIA**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56565.70	56086.40	0.85%
NIFTY AUTO	26435.00	26382.75	0.20%
NIFTY FMCG	49657.75	48377.90	2.65%
NIFTY IT	31809.85	31817.50	-0.02%
NIFTY METAL	12880.00	12740.20	1.10%
NIFTY PHARMA	22497.25	22465.00	0.14%
NIFTY REALTY	786.90	779.55	0.94%
BSE CG	76112.21	74479.85	2.19%
BSE CD	60329.69	59689.46	1.07%
BSE Oil & GAS	27144.84	26861.11	1.06%
BSE POWER	7780.28	7631.59	1.95%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	58475.90	59518.34	-1.75%
HANG SENG	26160.33	26394.26	-0.89%
STRAITS TIMES	4997.93	5007.83	-0.20%
SHANGHAI	4051.43	4055.55	-0.10%
KOSPI	6191.92	6226.05	-0.55%
JAKARTA	7634.00	7621.38	0.17%
TAIWAN	36804.34	37132.02	-0.88%
KLSE COMPOSITE	1695.21	1689.71	0.33%
ALL ORDINARIES	9168.70	9173.60	-0.05%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	151704.89	152709.34
NSE F&O	169715.42	159253.90

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	683.20
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Bajaj Consumer Care** posted consolidated net profit rose 105.29% year-on-year (YoY) to Rs 63.60 crore in Q4 FY26, compared with Rs 30.98 crore in the corresponding quarter last year. Total revenue from operations increased 30.40% YoY to Rs 326.66 crore.
- **CRISIL** posted consolidated net profit rose 45.93% to Rs 233.26 crore in the quarter ended March 2026 as against Rs 159.84 crore during the previous quarter ended March 2025. Sales rose 30.06% to Rs 1057.66 crore in the quarter ended March 2026 as against Rs 813.18 crore during the previous quarter ended March 2025.
- **VST Industries** posted net profit zoomed 120.16% to Rs 116.69 crore in Q4 FY26, compared with Rs 53 crore posted in Q4 FY25. Revenue from operations (excluding excise duty) jumped 31.09% YoY to Rs 457.06 crore in the quarter ended 31 March 2026.
- **Nuvoco Vistas Corporation** posted consolidated net sales at Rs 3,306.75 crore in March 2026 up 8.69% from Rs. 3,042.25 crore in March 2025. Net profit at Rs. 140.71 crore in March 2026 down 15% from Rs. 165.54 crore in March 2025.
- **NTPC** said its arm NGEL's group firm will begin commercial electricity supply of 150 MW from a 300 MW solar project in Rajasthan from April 18, 2026.
- **Finolex Cables** is expanding its reach in Northeast India, focusing on Assam. Government investments in infrastructure and electrification are driving this growth. The company expects the Northeast to become a significant contributor to its business in the coming years.
- **Varun Beverages Ltd** has become a global powerhouse. Starting with one PepsiCo plant in 1987, VBL is now the second-largest bottling business for PepsiCo worldwide outside the US. Its market value has surged significantly.
- **NBCC** has successfully sold commercial space in South Delhi. The sale of approximately 14 lakh square feet at Bharat Business Park fetched Rs 5,779 crore. This significant transaction was conducted through an e-auction. NBCC will receive a one percent marketing fee. These funds will support the redevelopment of residential

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HINDUNILVR	2240.80	2139.10	4.75%
NESTLEIND	1285.60	1257.40	2.24%
JSWSTEEL	1240.30	1214.90	2.09%
APOLLOHOSP	7699.00	7553.00	1.93%
POWERGRID	318.10	312.25	1.87%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
WIPRO	204.32	210.26	-2.83%
HDFCLIFE	616.45	631.50	-2.38%
SUNPHARMA	1675.50	1693.10	-1.04%
M&M	3200.20	3222.30	-0.69%
LT	4096.10	4119.80	-0.58%

(Source: [Moneycontrol](#))

- **Rail Vikas Nigam** emerged as the lowest bidder (L1) for a major infrastructure contract from East Coast Railway. The total contract value stands at approximately Rs 968 crore.

colonies in the area.

- **Crompton Greaves Consumer Electricals** has received a letter of empanelment and rate contract from Maharashtra State Electricity Distribution Company (MSEDCL) for design, manufacture, supply, installation, testing & commissioning of Off-grid DC Solar Photovoltaic Water Pumping Systems (SPWPS) under MTSKPY/PM-KUSUM-B scheme at various location across the State of Maharashtra with total order value of Rs. 71.75 crore.
- **Aurionpro Solutions** announced the launch of Fintra, an AI native trade finance platform that uses specialized AI agents to process trade finance instruments, paired with an operating layer designed for human governance at every decision point.
- **KPI Green Energy** received an inter-state power trading licence (Category IV) from the Central Electricity Regulatory Commission (CERC) enabling participation in India's national power markets.
- **Lupin** said that its wholly owned subsidiary, Lupin Pharmaceuticals Inc., has entered into a settlement agreement with Humana Inc. in connection with civil antitrust litigation in the United States.

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

Global News

- U.S. initial jobless claims fell to 207,000 in the week ended April 11th, a decrease of 11,000 from the previous week's revised level of 218,000. Continuing claims went up to 1818000 in the week ended April 4th 2026, an increase of 31000 from the previous week's revised level of 1787000.
- U.S. industrial production dropped 0.5% month-over-month in March 2026, after moving up 0.7% in February.
- U.S. manufacturing output decreased 0.1% month-over-month in March 2026, after moving up 0.4% in February.
- Eurozone trade surplus narrowed to EUR 11.5 billion in February 2026 from EUR 23.1 billion a year earlier.
- Eurozone current account surplus widened to EUR 21.1 billion in February 2026 from EUR 18.1 billion in the same month last year.

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

Economic News

- Crude Oil traded at US\$ 91.31/bbl (IST 17:00).
- INR strengthened to Rs. 92.93 from Rs. 93.21 against each US\$ resulting in daily change of 0.30%.
- India's current account deficit (CAD) is likely to touch 2 per cent of GDP under higher oil price scenarios, according to a report by Crisil.
- Government employees are pushing for major changes in pay and pensions with the Eighth Central Pay Commission. They want a higher basic salary and better benefits. Proposals include a new fitment factor and merging dearness allowance with basic pay. The plan also covers cadre restructuring and family-friendly policies.
- PNGRB has initiated bidding for nine LPG pipeline projects spanning around 2,500 km to reduce reliance on road transport and improve safety and efficiency in LPG distribution. As per its announcement, four key pipelines are currently in the bidding stage, with an estimated investment of Rs 12,500 crore. The move aims to connect refineries and import terminals with bottling plants, enabling seamless supply while minimising risks associated with tanker transport. PNGRB also highlighted that shifting to pipelines will cut greenhouse gas emissions, lower transit losses, generate employment, and support regional development, with a long-term goal of eliminating bulk LPG road transportation by 2030.

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

Forthcoming Events

Board Meetings as on 18/04/2026

HDFC Bank Limited	Financial Results/Dividend
ICICI Bank Limited	Financial Results/Dividend
Bharat Coking Coal Limited	Financial Results
Network18 Media & Investments Limited	Financial Results
Yes Bank Limited	Financial Results
HDFC Bank Limited	Financial Results/Dividend
ICICI Bank Limited	Financial Results/Dividend
Bharat Coking Coal Limited	Financial Results
Network18 Media & Investments Limited	Financial Results
Yes Bank Limited	Financial Results

Board Meetings as on 20/04/2026

PNB Housing Finance Limited	Financial Results/Dividend
SML Mahindra Limited	Financial Results/Dividend
Bank of Maharashtra	Financial Results/Dividend
Billionbrains Garage Ventures Limited	Financial Results
Indosolar Limited	Financial Results
Mold-Tek Packaging Limited	Dividend
Mold-Tek Technologies Limited	Dividend
Navkar Corporation Limited	Financial Results
NELCO Limited	Financial Results/Dividend
PNB Gilts Limited	Financial Results/Dividend
Ugro Capital Limited	Financial Results

(Source: NSE)

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