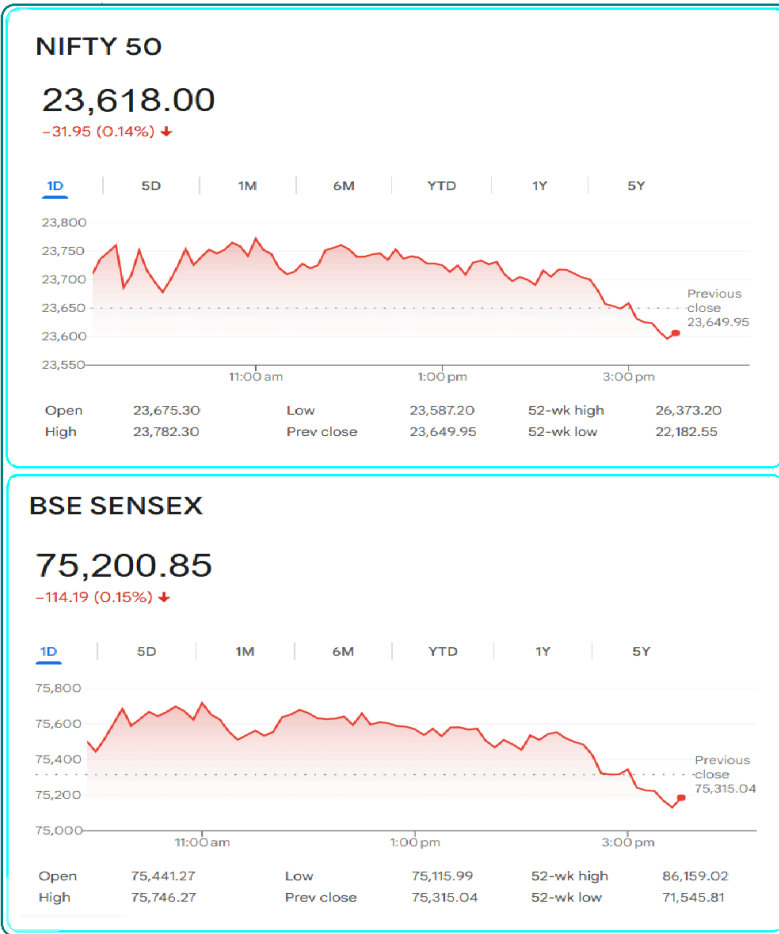


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23618.00	23649.95	<b>-0.14%</b>
<b>S&amp;P BSE SENSEX</b>	75200.85	75315.04	<b>-0.15%</b>
<b>NIFTY MID100</b>	61022.00	60473.80	<b>0.91%</b>
<b>NIFTY SML100</b>	17863.55	17656.75	<b>1.17%</b>

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

## Market Wrap Up

- The key equity benchmarks ended with marginal losses, despite upbeat global cues, as the rupee slipped to a fresh low of 96.60 against the US dollar. Nifty ended below the 23,650 mark.
- The barometer index, the S&P BSE Sensex declined 114.19 points or 0.15% to 75,200.85. The Nifty 50 index rose 31.95 points or 0.14% to 23,618.
- The BSE 150 MidCap Index added 0.73% and the BSE 250 SmallCap Index jumped 1.17%.
- Among the sectoral indices, the Nifty IT index (up 3.23%), the Nifty Realty index (up 1.43%) and the Nifty Media index (up 1.18%) outperformed the Nifty 50 index.
- Meanwhile the Nifty Private Bank index (down 0.74%), the Nifty Financial Services index (down 0.26%) and the Nifty Bank index (down 0.24%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **May** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **2741** contracts at the end of the day.
- **Long** position build up for the **May** series has been witnessed in **LT, SBIN, INFY**.
- **Short** position build up for the **May** series has been witnessed in **RELIANCE, ONGC, ICICIBANK, HDFCBANK**.
- **Unwinding** position for the **May** series has been witnessed in **BHARTIARTL, HCLTECH**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53409.15	53537.00	-0.24%
NIFTY AUTO	25698.80	25624.30	0.29%
NIFTY FMCG	50883.35	50900.10	-0.03%
NIFTY IT	29308.00	28389.80	3.23%
NIFTY METAL	13163.75	13169.95	-0.05%
NIFTY PHARMA	24867.40	24762.85	0.42%
NIFTY REALTY	762.70	751.95	1.43%
BSE CG	76118.17	76219.01	-0.13%
BSE CD	57486.13	57553.93	-0.12%
BSE Oil & GAS	26659.44	26561.94	0.37%
BSE POWER	7934.27	7889.44	0.57%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	60550.59	60815.95	-0.44%
HANG SENG	25797.85	25675.18	0.48%
STRAITS TIMES	5072.34	4996.75	1.51%
SHANGHAI	4169.54	4131.53	0.92%
KOSPI	7271.66	7516.04	-3.25%
JAKARTA	6370.68	6599.24	-3.46%
TAIWAN	40175.56	40891.82	-1.75%
KLSE COMPOSITE	1727.27	1727.71	-0.03%
ALL ORDINARIES	8829.50	8735.40	1.08%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	131116.02	123450.30
NSE F&O	192298.08	199123.54

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2457.49

(Source: [NSE](#))

## Corporate News

- Indian Oil Corporation** posted consolidated net sales at Rs 208,289.26 crore in March 2026 up 6.67% from Rs. 195,270.29 crore in March 2025. Net profit at Rs. 14,458.08 crore in March 2026 up 77.98% from Rs. 8,123.64 crore in March 2025.
- Somany Ceramics** posted consolidated net profit jumped 77.23% to Rs 37.82 crore on 6.02% increase in revenue from operations to Rs 811.97 crore in Q4 FY26 over Q4 FY25.
- Puravankara** reported a consolidated net profit of Rs 114.15 crore in Q4 FY26, compared with a net loss of Rs 85.50 crore in the corresponding quarter last year. Revenue from operations jumped 177.3% to Rs 1,501.92 crore in Q4 FY26 from Rs 541.57 crore in Q4 FY25.
- DOMS Industries** reported a 17.1% increase in consolidated net profit to Rs 56.7 crore in Q4 FY26 as against Rs 48.4 crore posted in Q4 FY25. Revenue from operations surged 18.7% to Rs 604 crore in Q4 FY26 from Rs 508.7 crore recorded in the corresponding quarter last year.
- Strides Pharma Science** reported 54.44% surge in consolidated net profit to Rs 126.94 crore in Q4 FY26 as against Rs 82.19 crore in Q4 FY25. Revenue from operations rose 11.17% YoY to Rs 1,323.47 crore in the quarter ended 31 March 2026.
- RITES** reported a 1.40% decline in consolidated net profit to Rs 139.35 crore, despite a 27.55% increase in revenue from operations to Rs 768.26 crore in Q4 FY26 compared with Q4 FY25.
- Indraprastha Gas** has reported a 25.17% fall in consolidated net profit to Rs 340.54 crore on an 5.69% increase in total net revenue from operations to Rs 4,584.58 crore in Q4 FY26 over Q4 FY25.
- Astral** reported an 18.79% year-on-year increase in consolidated net profit to Rs 213 crore for Q4 FY26, compared with Rs 179.3 crore in Q4 FY25. Revenue from operations rose 24.21% YoY to Rs 2,088.5 crore in the quarter ended 31 March 2026.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INFY	1196.90	1142.50	4.76%
HCLTECH	1179.40	1146.60	2.86%
TECHM	1467.10	1430.00	2.59%
ETERNAL	247.21	241.40	2.41%
TMPV	361.20	353.15	2.28%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
KOTAKBANK	381.95	391.80	-2.51%
ULTRACEMCO	11368.00	11561.00	-1.67%
TATACONSUM	1210.90	1231.00	-1.63%
TITAN	4102.00	4169.70	-1.62%
ADANIPIRTS	1762.80	1787.70	-1.39%

(Source: [Moneycontrol](#))

- **JK Paper** posted consolidated net profit surged 35.8% to Rs 91.98 crore on a 17.2% increase in revenue from operations to Rs 1,965.95 crore in Q4 FY26 over Q4 FY25.
- **Eureka Forbes** reported 0.7% rise in standalone net profit to Rs 51.1 crore even as revenues increased by 11.6% to Rs 683.8 crore in Q4 FY26 as compared with Q4 FY25.
- **IRB InvIT** posted consolidated net sales at Rs 528.18 crore in March 2026 up 87.46% from Rs. 281.75 crore in March 2025. Net profit at Rs. 96.61 crore in March 2026 up 3.29% from Rs. 93.53 crore in March 2025.
- **Central Bank of India** is set to launch its IFSC Banking Unit at GIFT City next month with an aim to expand its international banking operations. The bank will offer specialised services and access to international financial markets for corporate clients.
- **Vascon Engineers** announced that it has received Letter of Intent amounting to Rs 131.58 crore from Reliance Industries.

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

## Global News

- U.K. unemployment rate rose to 5.0% in the three months to March 2026, February's 4.9%. The number of people claiming unemployment benefits increased by 26.5 thousand to 1.699 million in April 2026, following a downwardly revised 4.9 thousand rise in the previous month.
- Eurozone trade surplus collapsed to EUR 7.8 billion in March 2026, down from a record EUR 34.1 billion a year earlier, as exports fell 5.5% to EUR 265.3 billion.
- Japan's GDP grew 0.5% qoq in Q1 2026, accelerating from a downwardly revised 0.2% increase in Q4. The economy advanced at an annualized pace of 2.1% in Q1 2026, picking up from a downwardly revised 0.8% growth in Q4.
- Japan's industrial production dropped 0.4% mom in March 2026, compared with the flash figure of a 0.5% decline. On an annual basis, output increased 2.4%, picking up from a 0.4% rise in February.

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

## Economic News

- Crude Oil traded at US\$ 107.81/bbl (IST 17:00).
- INR weakened to Rs. 96.53 from Rs. 96.36 against each US\$ resulting in daily change of 0.18%.
- Rating agency ICRA has revised India's FY27 GDP growth forecast down to 6.2% from 6.5% due to elevated crude oil prices stemming from the West Asia crisis. For FY26, growth is estimated at 7.5%. Q4 FY26 GDP growth is expected to slow to 7% amid moderating industrial and services sectors, with merchandise exports contracting.
- India's soymeal exports are projected to drop by half to a four-year low in the current year, driven by a 47% price surge over the past month. This makes Indian animal feed uncompetitive against South American supplies, prompting Asian buyers to switch. Tight domestic supplies and strong demand are keeping prices elevated.
- India's edible oil imports rose 3% to 166.51 lakh tonnes in the 2025-26 fiscal year, driven largely by a sharp jump in duty-free imports from Nepal, industry body Solvent Extractors' Association of India.
- Fuel prices saw a hike of about 90 paise per litre. The BJP stated this increase is among the lowest globally. State-run oil firms absorbed significant losses for 76 days before passing on some costs. Global crude prices surged due to the West Asia conflict. India's fuel price rise remains comparatively low against international benchmarks.

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

## Forthcoming Events

### Board Meetings as on 20/05/2026

Apollo Hospitals Enterprise Limited	Financial Results/Dividend
Grasim Industries Limited	Financial Results/Dividend
Bosch Limited	Financial Results/Dividend
Jubilant Foodworks Limited	Financial Results/Dividend
Honeywell Automation India Limited	Financial Results/Dividend
JK Lakshmi Cement Limited	Financial Results/Dividend
Aditya Birla Capital Limited	Fund Raising
Action Construction Equipment Limited	Financial Results/Dividend
Aptech Limited	Financial Results/Dividend
Arvind SmartSpaces Limited	Financial Results/Dividend/Fund Raising
Capacit'e Infraprojects Limited	Financial Results
COSMO FIRST LIMITED	Financial Results/Dividend
DCM Shriram Industries Limited	Financial Results/Dividend
Embassy Developments Limited	Financial Results

EPACK Durable Limited	Financial Results
Eris Lifesciences Limited	Financial Results/Dividend
Garware Technical Fibres Limited	Financial Results/Dividend
Hemisphere Properties India Limited	Financial Results
International Gemological Institute Limited	Financial Results
IOL Chemicals and Pharmaceuticals Limited	Financial Results
IRB Infrastructure Developers Limited	Financial Results/Dividend
Kaya Limited	Financial Results
Kesoram Industries Limited	Financial Results
Khadim India Limited	Financial Results
Kwality Wall's (India) Limited	Financial Results
Lenskart Solutions Limited	Financial Results
Medplus Health Services Limited	Financial Results
Metro Brands Limited	Financial Results/Dividend
Moschip Technologies Limited	Financial Results
Ola Electric Mobility Limited	Financial Results
Power Mech Projects Limited	Financial Results/Dividend
Protean eGov Technologies Limited	Financial Results/Dividend
Sammaan Capital Limited	Financial Results/Fund Raising
Samvardhana Motherson International Limited	Financial Results/Dividend/Fund Raising
Sanghvi Movers Limited	Financial Results/Dividend
Sansera Engineering Limited	Financial Results/Dividend
Talbros Automotive Components Limited	Financial Results/Dividend
Teamlease Services Limited	Financial Results/Buyback
The Byke Hospitality Ltd	Financial Results
UFLEX Limited	Financial Results/Dividend
Veedol Corporation Limited	Financial Results/Dividend
Vibhor Steel Tubes Limited	Financial Results
Walchandnagar Industries Limited	Financial Results
Whirlpool of India Limited	Financial Results/Dividend

(Source: NSE)

### Board Meetings as on 20/05/2026

Garware Technical Fibres Limited	Buy Back
The Great Eastern Shipping Company Limited	Interim Dividend - Rs 11.70 Per Share

(Source: NSE)

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