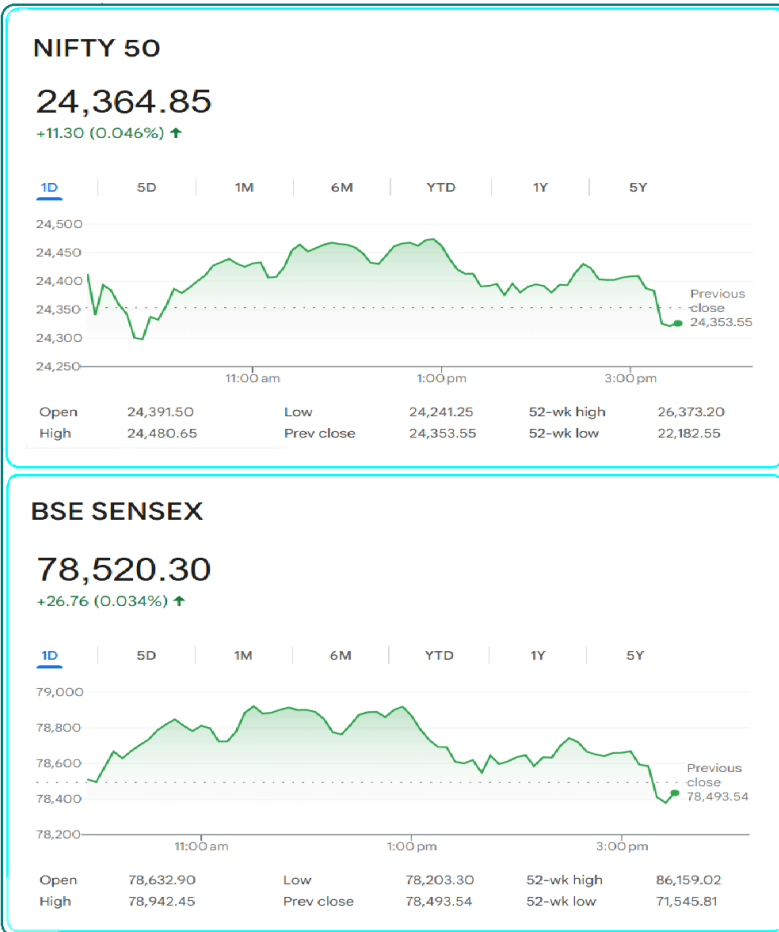


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24364.85	24353.55	0.05%
S&P BSE SENSEX	78520.30	78493.54	0.03%
NIFTY MID100	59790.75	59898.20	-0.18%
NIFTY SML100	17486.90	17565.70	-0.45%

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

Market Wrap Up

- The key equity indices ended with minor gains today, extending gains for the second consecutive trading session, despite uncertainty surrounding developments in the West Asia conflict. However, market participants will monitor upcoming Q4 results and their implications for broader market sentiment. Traders will also track crude oil prices, gold, and rupee movement amid geopolitical uncertainty. The Nifty ended above the 24,350 mark.
- The S&P BSE Sensex jumped 26.76 points or 0.03% to 78,520.30. The Nifty 50 index rose 11.30 points or 0.05% to 24,364.85. In the past two consecutive trading session, the Sensex, Nifty jumped 0.68% and 0.70%
- The BSE 150 MidCap Index fell 0.09% and the BSE 250 SmallCap Index shed 0.15%.
- Among the sectoral indices, the Nifty Media index (up 0.90%), the Nifty PSU Bank index (up 0.87%) and the Nifty Auto index (up 0.33%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 0.70%), the Nifty Realty index (down 0.62%) and the Nifty Metal index (down 0.39%) underperformed the Nifty 50 index

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **April** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **1375** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **BHEL, SBIN, ICICIBANK, BAJFINANCE**.
- **Short** position build up for the **April** series has been witnessed in **RELIANCE, BHARTIARTL, HDFCBANK, INFY**.
- **Unwinding** position for the **April** series has been witnessed in **PAYTM, TRENT, PNB**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56582.35	56565.70	0.03%
NIFTY AUTO	26522.30	26435.00	0.33%
NIFTY FMCG	49555.75	49657.75	-0.21%
NIFTY IT	31585.75	31809.85	-0.70%
NIFTY METAL	12829.65	12880.00	-0.39%
NIFTY PHARMA	22456.75	22497.25	-0.18%
NIFTY REALTY	782.05	786.90	-0.62%
BSE CG	76533.10	76112.21	0.55%
BSE CD	60484.02	60329.69	0.26%
BSE Oil & GAS	27207.16	27144.84	0.23%
BSE POWER	7877.08	7780.28	1.24%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	58824.89	58475.90	0.60%
HANG SENG	26361.07	26160.33	0.77%
STRAITS TIMES	5004.07	4997.93	0.12%
SHANGHAI	4082.13	4051.43	0.76%
KOSPI	6219.09	6191.92	0.44%
JAKARTA	7594.11	7634.00	-0.52%
TAIWAN	36958.80	36804.34	0.42%
KLSE COMPOSITE	1702.30	1695.21	0.42%
ALL ORDINARIES	9174.10	9168.70	0.06%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	129979.03	151704.89
NSE F&O	184446.68	169715.42

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1059.93

(Source: [NSE](#))

Corporate News

- ICICI Bank** reported 8.5% increase in standalone net profit at Rs 13,702 crore for the quarter ended March 31, 2026 compared Rs 12,629.58 crore in the previous year. NII of Rs 22,979 crore, up from Rs 21,193 crore a year earlier which translates to a growth of Rs 1,786 crore, or 8.43%.
- HDFC Bank** reported 9% rise in standalone net profit at Rs 19,221 crore for the quarter ended March 31, 2026, as compared to Rs 17,616 crore in the year-ago period. Revenue grew by 5% to Rs 46,280 crore for the quarter ended March 31, 2026 from Rs 44,090 crore for the quarter ended March 31, 2025. The bank declared a final dividend of Rs 13 per share for FY26 and said the record date for payment of the dividend would be June 19, 2026. In addition, the board of directors approved a special interim dividend of Rs 2.5 per share.
- YES Bank** reported a robust rise in its standalone net profit for the quarter ended March 31, 2026. It reported a standalone net profit of Rs 1,068 crore for the fourth quarter, as compared to Rs 739 crore in the year-ago period. Total income rose marginally to Rs 9,381 crore in Q4FY26 as compared to Rs 9,356 crore in the year-ago period.
- Network 18 Media & Investments** reported consolidated net loss of Rs 29.61 crore in Q4 FY26 as against a net loss of Rs 29.09 crore in Q4 FY25. Revenue rose 9.70% to Rs 615.78 crore in the March quarter from Rs 561.32 crore recorded in the same period last year.
- Mastek** posted consolidated net profit declined 2.03% quarter-on-quarter (QoQ) to Rs 106.15 crore, despite a 3.56% QoQ increase in revenue from operations to Rs 938 crore in Q4 FY26.
- Vedanta Resources** is looking to boost its existing \$350 million loan by at least \$200 million. The company is in talks with Sumitomo Mitsui Banking Corp. and First Abu Dhabi Bank to join the facility. This move aims to refinance obligations, cover transaction costs, and support general corporate needs, as Vedanta continues its debt reduction efforts.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TRENT	4242.80	4107.70	3.29%
JSWSTEEL	1274.50	1240.30	2.76%
SBIN	1107.85	1080.25	2.55%
ASIANPAINT	2516.80	2464.00	2.14%
GRASIM	2760.10	2720.50	1.46%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	237.15	243.86	-2.75%
HINDALCO	1015.25	1039.00	-2.29%
TMPV	355.70	360.10	-1.22%
KOTAKBANK	379.20	383.60	-1.15%
BEL	457.55	462.75	-1.12%

(Source: [Moneycontrol](#))

- **EMS** emerged as the lowest bidder (L1) for two sewerage infrastructure projects from UP Jal Nigam (Urban) in Varanasi, with a combined order value of about Rs 208.6 crore.
- **Sterling and Wilson Renewable Energy** has secured new domestic orders worth around Rs 3,550 crore, boosting its order inflow for FY26.
- **Dredging Corporation of India** signed a memorandum of understanding (MoU) worth Rs 2,157.07 crore with Indian Oil Corporation (IOCL) for fuel supply.
- **Zen Technologies** announced that it has been granted an arms manufacturing licence by the Government of India under the Arms Act, 1959.
- **UltraTech Cement** said that the company has commissioned three new cement grinding units with a cumulative capacity of 8.7 million tonnes per annum (MTPA).
- **PNGS Reva Diamond Jewellery** reported strong sales performance on the occasion of Akshay Tritiya, marking a robust start to the financial year 2026-27. Revenue for the day (19 April 2026) stood at Rs 127.27 million (Rs 12.72 crore), compared with Rs 34.63 million (Rs 3.46 crore) recorded on the same occasion last year, registering a 2.67 times year-on-year growth.
- **SAEL Industries** has started a 600-megawatt solar power plant in Kurnool, Andhra Pradesh. This plant will supply power to the national grid for 25 years. It uses over 12 lakh solar modules. The project will reduce carbon emissions significantly. This development adds to SAEL's growing operational capacity.
- **NTPC Green Energy** has commissioned 87.50 MW of solar capacity at a 150 MW project in Rajasthan.
- **Lupin** said that the United States Food and Drug Administration (U.S. FDA) has concluded an inspection at our manufacturing facility located in Somerset, New Jersey, U.S.A.
- **Cipla** said that the United States Food and Drug Administration (US FDA) has conducted an inspection at the company's manufacturing facility in Verna, Goa, India from 6th to 17th April 2026.
- **Aurobindo Pharma** announced that it has received approval from the US Food and Drug Administration (USFDA) for Dextromethorphan Polistirex extended-release oral suspension, 30 mg/5 mL (OTC).

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

Global News

- The People's Bank of China maintained its key lending rates at record lows for an 11th straight month in April 2026, the one-year loan prime rate (LPR), the benchmark for most corporate and household borrowing, was held at 3.0%, while the five-year LPR, a reference for mortgage rates, remained at 3.5%.
- U.K. Rightmove house price index rose 0.8% MoM in April, or GBP2,929, to nearly GBP374,000. On a YoY basis, it fell 0.9%.
- Germany's producer prices fell 0.2% year-on-year in March 2026, easing from a 3.3% decline in February. On a monthly basis, producer prices jumped 2.5%.

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

Economic News

- Crude Oil traded at US\$ 88.17/bbl (IST 17:00).
- INR weakened to Rs. 93.13 from Rs. 92.93 against each US\$ resulting in daily change of 0.22%.
- India and South Korea will resume talks to upgrade their economic partnership agreement. The goal is to increase bilateral trade to 50 billion dollars by 2030. Both nations will also enhance cooperation in critical technologies and supply chains. An economic security dialogue will be established. Discussions will cover shipbuilding, steel, and sustainability. Industrial collaboration will expand through new agreements.
- India has increased the number of Russian insurers authorized to provide marine cover for ships docking at its ports. This move allows more Russian companies to offer protection and indemnity coverage. The expanded list includes several Russian firms with registrations valid until 2026, 2027, 2029, and 2030.
- India is launching the Bharat Maritime Insurance Pool, backed by a substantial sovereign guarantee of over Rs. 12,980 crore. This strategic initiative aims to offer unwavering maritime insurance coverage for Indian vessels, encompassing all maritime risks and significantly decreasing dependency on international insurers.
- India faces global challenges from a strong position. Economic growth is projected between 6.8% and 7.1% for FY27. The nation's banking sector is robust. Opportunities arise for GIFT City and Indian airports. The Reserve Bank of India is likely to maintain its current monetary policy stance. India's resilience is evident amidst regional conflict and global uncertainties.
- India's direct-to-consumer brands are seeing rapid expansion driven by smaller cities. Tier 2 and 3 cities will account for nearly 66% of new orders in FY26. This growth fuels a 33% rise in order volumes and a 32% increase in GMV. The D2C market is set to reach USD 60 billion by 2030.

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

Forthcoming Events

Board Meetings as on 21/04/2026

Nestle India Limited	Financial Results/Dividend
HCL Technologies Limited	Financial Results/Dividend
Persistent Systems Limited	Financial Results/Dividend
Tata Elxsi Limited	Financial Results/Dividend
Tata Investment Corporation Limited	Financial Results/Dividend
360 ONE WAM LIMITED	Financial Results/Dividend
Central Mine Planning & Design Institute Limited	Financial Results/Dividend
Cyient DLM Limited	Financial Results
Mahindra EPC Irrigation Limited	Financial Results
NDL Ventures Limited	Financial Results/Dividend
Patanjali Foods Limited	Dividend
Powerica Limited	Financial Results
Sunteck Realty Limited	Financial Results/Dividend
Transformers And Rectifiers (India) Limited	Financial Results/Dividend

(Source: NSE)

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