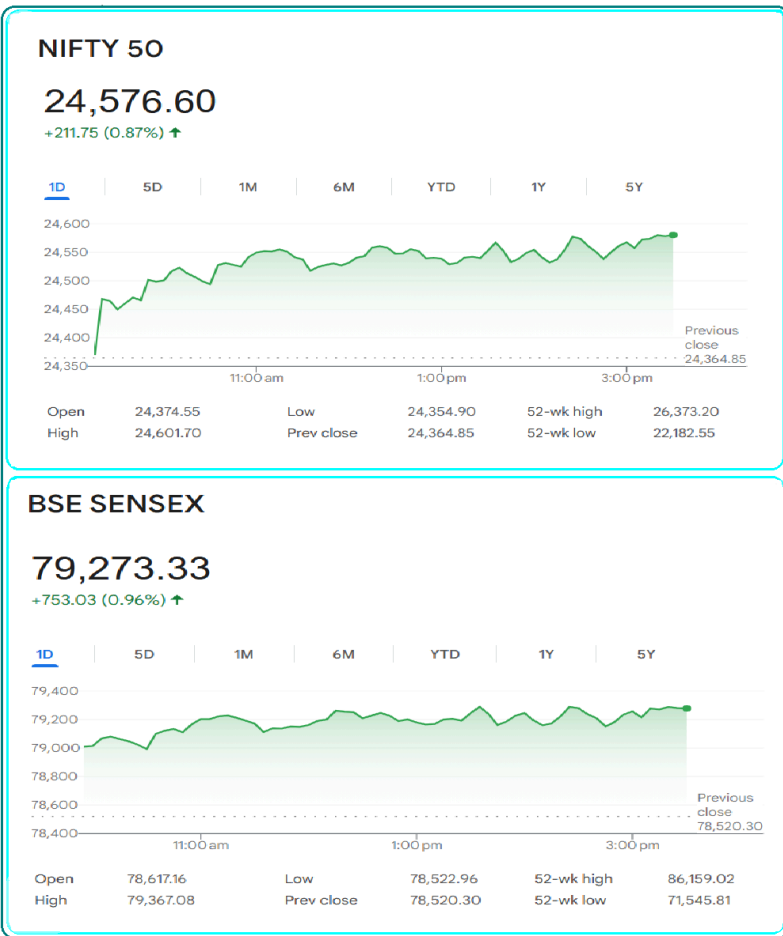


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	24576.60	24364.85	<b>0.87%</b>
<b>S&amp;P BSE SENSEX</b>	79273.33	78520.30	<b>0.96%</b>
<b>NIFTY MID100</b>	60086.70	59790.75	<b>0.49%</b>
<b>NIFTY SML100</b>	17641.50	17486.90	<b>0.88%</b>

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

## Market Wrap Up

- The key equity indices ended with major gains today, extending gains for the third session, supported by optimism over potential peace talks between the US and Iran. Investor sentiment was further supported by easing crude oil prices. Meanwhile, market participants turned their focus to Q4 earnings while tracking global developments for cues. The Nifty ended above the 24,550 mark.
- The S&P BSE Sensex jumped 753.03 points or 0.96% to 79,273.33. The Nifty 50 index advanced 211.75 points or 0.87% to 24,576.60. In the three consecutive trading sessions, the Sensex and Nifty jumped 1.65% and 1.57%, respectively. The BSE 150 MidCap Index gained 0.55% and the BSE 250 SmallCap Index surged 0.71%.
- Among the sectoral indices, the Nifty FMCG index (up 2.55%), the Nifty Realty index (up 2.14%) and the Nifty Private Bank index (up 1.50%) outperformed the Nifty 50 index. Meanwhile, the Nifty Pharma index (down 0.08%), the Nifty Consumer Durables index (down 0.02%) and the Nifty Metal index (up 0.04%) 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 **1384** contracts at the end of the day.
- **Long** position build up for the **April** series has been witnessed in **BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- **Short** position build up for the **April** series has been witnessed in **RELIANCE, VEDL**.
- **Unwinding** position for the **April** series has been witnessed in **TCS, TECHM**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57371.45	56582.35	1.39%
NIFTY AUTO	26625.20	26522.30	0.39%
NIFTY FMCG	50820.10	49555.75	2.55%
NIFTY IT	31729.10	31585.75	0.45%
NIFTY METAL	12835.00	12829.65	0.04%
NIFTY PHARMA	22438.45	22456.75	-0.08%
NIFTY REALTY	798.75	782.05	2.14%
BSE CG	76489.96	76533.10	-0.06%
BSE CD	60540.34	60484.02	0.09%
BSE Oil & GAS	27280.60	27207.16	0.27%
BSE POWER	7911.77	7877.08	0.44%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	59349.17	58824.89	0.89%
HANG SENG	26487.48	26361.07	0.48%
STRAITS TIMES	5014.96	5004.07	0.22%
SHANGHAI	4085.08	4082.13	0.07%
KOSPI	6388.47	6219.09	2.72%
JAKARTA	7559.38	7594.11	-0.46%
TAIWAN	37605.11	36958.80	1.75%
KLSE COMPOSITE	1715.33	1702.30	0.77%
ALL ORDINARIES	9177.10	9174.10	0.03%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	127825.49	129979.03
NSE F&O	192269.43	184446.68

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1918.99

(Source: [NSE](#))

## Corporate News

- Nestle India** posted consolidated profit rose 11.3% to Rs 1,110.90 crore. Revenue rose to Rs 6766.24 crore from Rs 5,679.87 crore in the same quarter last year. The company declared a final dividend of Rs 5 per share.
- Bank of Maharashtra** posted standalone net profit increasing 34.89% year-on-year to Rs 2,014.09 crore from Rs 1,493.08 crore in the same quarter last year. Total income for the quarter ended 31 March 2026 increased 12.79% YoY to Rs 8,693.04 crore. NII grew 18.81% YoY to Rs 3,702 crore, while the bank's net interest margin stood at 3.91%.
- PNB Housing Finance** reported 19.2% rise in consolidated net profit to Rs 656 crore on a 10.8% increase in net interest income to Rs 813 crore in Q4 FY26 as compared with Q4 FY25. Total income for the period under review was Rs 2,171.91 crore, up 6.6% YoY.
- Nelco** posted consolidated net profit of Rs 1.09 crore for Q4 FY26, compared with a net loss of Rs 4.08 crore in the year-ago period. Total income jumped 15.60% YoY to Rs 81.11 crore in Q4 FY26, from Rs 70.16 crore in the corresponding quarter last year.
- SML Mahindra** reported a marginal 2.36% year-on-year (YoY) rise in standalone net profit to Rs 54.20 crore for the fourth quarter ended 31st March 2026, compared with Rs 52.95 crore in the corresponding quarter last year. Revenue from operations rose 16.39% YoY to Rs 897.65 crore in the quarter ended 31 March 2026.
- Indosolar** reported a 4.90% increase in standalone net profit to Rs 42 crore in Q4 FY26, compared with Rs 40.04 crore in Q4 FY25. Revenue from operations declined sharply by 56.72% year-on-year to Rs 83.10 crore from Rs 192 crore.
- UGRO Capital** reported 27.10% decline in standalone net profit to Rs 29.55 crore in Q4 FY26 as against Rs 40.54 crore posted in Q4 FY25. However, total income increased 23.42% YoY to Rs 509.04 crore in the quarter ended 31 March 2026.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
NESTLEIND	1379.90	1286.40	7.27%
HINDUNILVR	2310.70	2231.50	3.55%
TRENT	4390.50	4242.80	3.48%
ICICIBANK	1388.40	1356.20	2.37%
BAJFINANCE	938.85	917.75	2.30%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
SBILIFE	1911.60	1982.50	-3.58%
BEL	451.50	457.55	-1.32%
JIOFIN	234.75	237.15	-1.01%
DRREDDY	1220.60	1232.60	-0.97%
TITAN	4479.70	4513.00	-0.74%

(Source: [Moneycontrol](#))

- Biocon** said that Health Canada has granted a notice of compliance (NOC) for Bosaya (denosumab), a biosimilar to Prolia, and Vezuo (denosumab), a biosimilar to Xgeva.
  - Eris Lifesciences** said that HALMED inspected the manufacturing facilities of company's wholly owned subsidiary, Swiss Parenterals located in Ahmedabad, Gujarat.
  - Suzlon Energy** and Korean firm GS E&C have signed an initial pact to partner in India's renewable energy sector, focusing on project development and solution optimization. Additionally, GS E&C will cooperate with Arie Energy LLP on wind farm repowering projects. AFINIT and Yes Bank also inked an MoU to enhance financial inclusion in India.
  - 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.
  - RailTel Corporation of India** said that it has secured a contract from the Municipal Corporation of Greater Mumbai (MCGM). The order, awarded by a domestic entity, has an estimated value of Rs 86.36 crore.
- Jio Financial Services** is expanding its lending book with property and asset-backed corporate loans. The company prioritizes balance sheet strength before venturing into unsecured credit. Its loan book currently focuses on these secured segments. Jio Financial Services aims to be a full-service financial provider, with its payments bank and payment aggregator businesses also showing growth.
  - RateGain Travel Technologies** announced a strategic partnership with Easebuzz, a leading digital payments platform in India, as a Gold Partner for RG Pay.

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

## Global News

- China's urban youth unemployment rate for those aged 16-24, excluding students, rose to 16.9% in March 2026 from 16.1% in the previous month.
- U.K. unemployment rate fell to 4.9% in the three months to February 2026, it would remain at the previous period's 5.2%. The number of people claiming unemployment benefits increased by 26.8 thousand to 1.694 million in March 2026, following a downwardly revised 17.1 thousand rise in the previous month.
- Eurozone ZEW Indicator of Economic Sentiment dropped sharply by 11.9 points to -20.4 in April 2026. The assessment of the current situation also weakened, with the index falling 13.1 points to -43.
- Germany's ZEW Indicator of Economic Sentiment plunged by 16.7 points to -17.2 in April 2026. The current conditions plummeted by 10.8 points to -73.7 in April 2026.

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

## Economic News

- Crude Oil traded at US\$ 88.21/bbl (IST 17:00).
- INR weakened to Rs. 93.50 from Rs. 93.13 against each US\$ resulting in daily change of 0.40%.
- India's core industrial activity contracted in March 2026, with the combined Index of Eight Core Industries (ICI) falling 0.4% year-on-year compared to March 2025, a sharp reversal from 2.8% growth in February.
- India's economy is projected to grow 6.4% in 2026 and 6.6% in 2027, according to a United Nations Economic and Social Commission for Asia and the Pacific report, after expanding 7.4% in 2025 on strong consumption and tax cuts.
- India's fertilizer production plunged nearly a quarter in March, fertilizer production declined by 24.6% in March 2026, over March 2025.
- India's deal activity saw a significant rise in 2025. Deal values increased by 18% to USD 123.8 billion. The country had witnessed deal values of USD 106.3 billion in 2024.

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

## Forthcoming Events

### Board Meetings as on 22/04/2026

Tech Mahindra Limited	Financial Results/Dividend
Trent Limited	Financial Results/Dividend
L&T Technology Services Limited	Financial Results/Dividend
Havells India Limited	Financial Results/Dividend
Oracle Financial Services Software Limited	Financial Results/Dividend
SBI Life Insurance Company Limited	Financial Results
Tata Communications Limited	Financial Results/Dividend
Bharat Coking Coal Limited	Financial Results
Delta Corp Limited	Financial Results/Dividend
Maharashtra Scooters Limited	Financial Results/Dividend

(Source: NSE)

### Corporate Actions as on 22/04/2026

CIE Automotive India Limited	Dividend - Rs 7 Per Share
Sanofi India Limited	Dividend - Rs 48 Per Share

(Source: NSE)

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