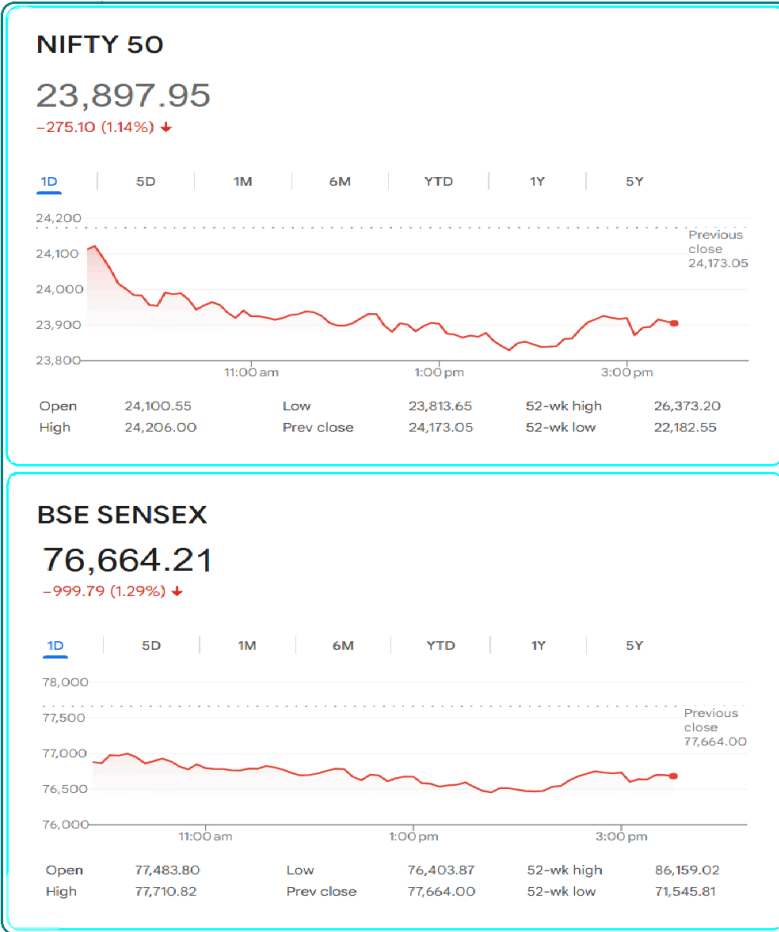


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23897.95	24173.05	-1.14%
S&P BSE SENSEX	76664.21	77664.00	-1.29%
NIFTY MID100	59374.80	59952.80	-0.96%
NIFTY SML100	17567.20	17720.75	-0.87%

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

Market Wrap Up

- The key equity indices ended with major cuts today, extending losses for the third consecutive trading session, as investor sentiment remained cautious amid stalled US-Iran negotiations, uncertainty over the reopening of the Strait of Hormuz, and a sharp climb in crude oil prices above the \$107-per-barrel mark. Until signs of de-escalation emerge, the overhang on crude oil prices, the rupee, and institutional flows is expected to persist. Investors will also closely monitor Q4 earnings for further cues. The Nifty ended below the 23,900 level.
- The S&P BSE Sensex tumbled 999.79 points or 1.29% to 76,664.21. The Nifty 50 index slumped 275.10 points or 1.14% to 23,897.95. In the past three consecutive trading sessions, the Sensex and Nifty declined 3.29% and 2.76%, respectively. The BSE 150 MidCap Index slipped 0.94% and the BSE 250 SmallCap Index dropped 1.17%.
- Among the sectoral indices, the Nifty PSU Bank index (down 0.15%), the Nifty Metal index (down 0.31%) and the Nifty Private Bank index (down 0.48%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 5.29%), the Nifty Media index (down 1.87%) and the Nifty Pharma index (down 1.77%) 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 **44364** contracts at the end of the day.
- **Long** position build up for the **May** series has been witnessed in **SBIN, KOTAKBANK, SHRIRAMFIN, NMDC**.
- **Short** position build up for the **May** series has been witnessed in **RELIANCE, BHARTIARTL, ICICIBANK, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56089.75	56305.00	-0.38%
NIFTY AUTO	25652.85	25828.10	-0.68%
NIFTY FMCG	50766.25	51140.50	-0.73%
NIFTY IT	28530.60	30124.30	-5.29%
NIFTY METAL	12746.65	12786.25	-0.31%
NIFTY PHARMA	22580.10	22986.35	-1.77%
NIFTY REALTY	778.00	788.65	-1.35%
BSE CG	77089.06	77648.33	-0.72%
BSE CD	59083.00	59693.62	-1.02%
BSE Oil & GAS	27038.25	27209.37	-0.63%
BSE POWER	8067.49	8100.13	-0.40%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	59716.18	59140.23	0.97%
HANG SENG	25978.07	25915.20	0.24%
STRAITS TIMES	4922.86	4944.11	-0.43%
SHANGHAI	4079.90	4093.25	-0.33%
KOSPI	6475.63	6475.81	-
JAKARTA	7129.49	7378.61	-3.38%
TAIWAN	38932.40	37714.15	3.23%
KLSE COMPOSITE	1720.34	1721.70	-0.08%
ALL ORDINARIES	9006.40	9024.20	-0.20%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	130943.28	135481.36
NSE F&O	435536.82	385015.94

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	8827.87

(Source: [NSE](#))

Corporate News

- IndusInd Bank** announced profit of Rs 533 crore for the quarter ended March 31, 2026 as against loss of Rs 2,236 crore in the year-ago period. Net interest income climbed 43% year-on-year to Rs 4,371 crore. The lender declared a final dividend of Rs 1.5 per share for FY26.
- LTM** reported a 44.57% surge in consolidated net profit to Rs 1,387.3 crore despite a 4.74% jump in revenue from operations to Rs 11,291.7 crore in Q4 FY26 over Q3 FY26.
- Adani Green Energy** reported a 34.20% year-on-year (YoY) increase in consolidated net profit to Rs 514 crore in Q4 FY26, compared with Rs 383 crore in the corresponding quarter last year. Revenue from operations grew 16.05% YoY to Rs 3,094 crore during the quarter under review.
- Hindustan Zinc** reported a 67.59% year-on-year (YoY) surge in consolidated net profit to Rs 5,033 crore in Q4 FY26, compared with Rs 3,003 crore in the corresponding quarter last year. On a sequential basis, net profit rose 28.52% quarter-on-quarter (QoQ) from Rs 3,916 crore in Q3 FY26. Revenue from operations stood at Rs 13,544 crore during the quarter, registering a sharp increase of 49% YoY and 23% QoQ.
- Shriram Finance** posted consolidated net profit rose 40.92% to Rs 3020.94 crore in the quarter ended March 2026 as against Rs 2143.77 crore during the previous quarter ended March 2025. NII rose 9.44% to Rs 12306.75 crore in the quarter ended March 2026 as against Rs 11245.00 crore during the previous quarter ended March 2025.
- Zensar Technologies** posted consolidated net profit rose 19.39% to Rs 210.60 crore in the quarter ended March 2026 as against Rs 176.40 crore during the previous quarter ended March 2025. Sales rose 6.73% to Rs 1450.40 crore in the quarter ended March 2026 as against Rs 1358.90 crore during the previous quarter ended March 2025.
- Chennai Petroleum Corporation** posted consolidated net profit rose 202.57% to Rs 1421.85 crore in the quarter ended March 2026 as against Rs 469.93 crore during the previous quarter ended March 2025. Sales declined 2.50% to Rs 16817.32 crore in the quarter ended March 2026 as

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	456.00	450.65	1.19%
TRENT	4297.30	4251.40	1.08%
NESTLEIND	1421.30	1410.50	0.77%
HINDALCO	1048.35	1041.35	0.67%
SBIN	1101.10	1094.25	0.63%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1154.60	1240.60	-6.93%
HCLTECH	1203.20	1277.60	-5.82%
TCS	2396.90	2521.80	-4.95%
TECHM	1358.50	1421.50	-4.43%
SUNPHARMA	1620.40	1680.10	-3.55%

(Source: [Moneycontrol](#))

- **Cipla** has secured final approval from the US health regulator for its generic albuterol sulfate inhalation aerosol. This marks a significant milestone for Cipla, reinforcing its leadership in the respiratory segment.
- **Sun Pharmaceutical Industries** announced the incorporation of a subsidiary, 'Sun Pharma America, Inc.,' in the United States of America on 23 April 2026.
- **Sun Pharmaceutical** is making its biggest move yet with a \$13 billion offer for Organon & Co. This ambitious bid aims to transform the Indian generics giant into a global leader in branded and innovative medicines. The deal, if successful, would see Organon merge with Sun Pharma.
- The Bombay High Court has ruled against a Navi Mumbai drugmaker. The court prohibited the use of brand names 'Absun' and 'Absun Pharma'. This decision favors **Sun Pharmaceutical Industries** in a decade-long trademark dispute. The court found the names deceptively similar to Sun Pharma's established marks. The ruling prevents confusion among consumers in the pharmaceutical market.

against Rs 17249.12 crore during the previous quarter ended March 2025.

- **Cyient** declined 1.85% to Rs 918.60 after the company reported a 32.61% fall in consolidated net profit to Rs 65.5 crore despite a 3.94% rise in total income to Rs 1,953.5 crore in Q4 FY26 over Q3 FY26.
- **Tata Capital** has reported 42.8% rise in consolidated net profit to Rs 1,502 crore on an 8.7% increase in total income to Rs 8,163.29 crore in Q4 FY26 as compared with Q4 FY25.
- **Adani Energy Solutions** reported consolidated net profit rose 1.3% YoY to Rs 723 crore in Q4 FY26 from Rs 714 crore in Q4 FY25. Revenue from operations stood at Rs 4,400 crore in Q4 FY26, up 6.9% YoY from Rs 4,116 crore in the year-ago period.
- **Aditya Birla Sun Life AMC's** consolidated net profit declined 17.96% to Rs 187.11 crore in Q4 FY26 as against Rs 228.08 crore in Q4 FY25. However, revenue from operations jumped 6.85% year on year to Rs 458.23 crore in Q4 FY26.
- **Larsen & Toubro** has entered the B2B industrial electronics space with the commencement of manufacturing operations at its Coimbatore campus in Tamil Nadu.
- **Hindustan Construction Company** has secured a significant infrastructure contract worth Rs 2,917 crore from the City and Industrial Development Corporation of Maharashtra (CIDCO). The order is for the construction of a 22.21 km raw water tunnel and a 250 MLD water treatment plant in Raigad. The project has been awarded to the LCESPL-HCC joint venture, with HCC's execution share valued at around Rs 1,100 crore.
- **Aditya Birla Real Estate** announced that its wholly owned subsidiary, Birla Estates, recorded a booking value of Rs 8,136 crore in FY26, following a strong performance in the previous year, driven by robust demand across key residential markets.

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

Global News

- China's foreign direct investment inflows into China fell by 7.3% year-on-year to CNY 249.6 billion in the first quarter of 2026.
- U.S. initial jobless claims climbed to 214,000 in the week ended April 18th, an increase of 6,000 from the previous week's revised level of 208,000. Continuing Jobless Claims increased to 1821000 in the week ending April 11 of 2026 from 1809000 in the previous week.
- U.S. S&P Global flash Composite PMI increased to 52 in April 2026, the highest in three months, from 50.3 in March. The manufacturing PMI climbed to 54.0 in April 2026, up from 52.3 in March while the services PMI rose to 51.3 in April of 2026 from 50.3 in the previous month.
- U.K. retail sales volumes rose 0.7% month-on-month in March 2026, rebounding from a revised 0.6% drop in February. Core retail sales rose 0.2%. On a yearly basis, retail sales rose 1.7%, slightly easing from a 1.8% increase in February.
- U.K. GfK Consumer Confidence Index dropped four points to -25 in April 2026.
- Germany's Ifo Business Climate Index declined 1.9 points to 84.4 in April 2026. The expectations fell to 83.3 from 85.9. The assessment of current conditions worsened, decreasing to 85.4 from 86.7.
- France's consumer confidence fell to 84 in April 2026 from 89 in March.
- Japan's annual inflation rose to 1.5% in March 2026 from February's near four-year low of 1.3%. Core inflation accelerated to 1.8% from February's 1.6%, but remained below the central bank's 2% target for the second month. Monthly, the CPI increased 0.4%, reversing a 0.2% decline in January and February.

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

Economic News

- Crude Oil traded at US\$ 95.54/bbl (IST 17:00).
- INR weakened to Rs. 94.26 from Rs. 94.12 against each US\$ resulting in daily change of 0.15%.
- India and New Zealand will sign a Free Trade Agreement on Monday, April 27. This landmark deal aims to boost bilateral trade significantly. Negotiations concluded last year with a goal to double trade to five billion dollars in five years. The pact is expected to offer tariff-free access for Indian goods.
- India's foreign exchange reserves increased by \$2.3 billion in the week ending April 17, reaching \$703.30 billion. This follows a period of depletion after the Middle East conflict, which had previously caused the rupee to come under pressure and prompted RBI intervention. Reserves had previously hit an all-time high in February 2026.
- A strong El Nino is expected in the second half of 2026. This will bring hotter, drier weather to Asia. Crops and food supplies will be affected. Farmers face fertilizer shortages and high fuel costs. India anticipates below-average monsoon

rains. Southeast Asia's palm oil and rice production may decline. China could see increased flooding risk.

- Petrol and diesel sales are surging amid expectations of a price hike after state elections conclude on April 29. Indian Oil Corp said Thursday petrol and diesel sales at its pumps rose more than 13% year-on-year during April 1-21. By comparison, petrol sales grew 6.5% and diesel 3.6% in FY26.
- In a collaborative effort, Indian and US officials finalized a series of trade talks on April 23, marking a pivotal moment in their economic relationship. They have pledged to persist with their discussions, focusing on critical elements such as market access and the growing field of digital trade.
- India has approved a Rs 30 billion currency swap for the Maldives. This reaffirms New Delhi's role as a key financial partner. The Maldives also settled a previous \$400 million swap. This facility will support economic stability amid regional challenges. India's support strengthens ties and regional financial cooperation.

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

Forthcoming Events

Board Meetings as on 25/04/2026

Axis Bank Limited	Financial Results/Dividend/Fund Raising
IDFC First Bank Limited	Financial Results/Dividend
RBL Bank Limited	Financial Results/Dividend
Automotive Stampings and Assemblies Limited	Financial Results
MIC Electronics Limited	Financial Results
SBFC Finance Limited	Financial Results/Fund Raising
Sejal Glass Limited	Financial Results
The India Cements Limited	Financial Results
UCO Bank	Financial Results/Dividend/Fund Raising

Board Meetings as on 26/04/2026

Avantel Limited	Financial Results/Dividend
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Board Meetings as on 27/04/2026

UltraTech Cement Limited	Financial Results/Dividend
Coal India Limited	Financial Results/Dividend
Bajaj Housing Finance Limited	Financial Results
Canara Robeco Asset Management Company Limited	Financial Results/Dividend
Adani Total Gas Limited	Financial Results/Dividend
Astec LifeSciences Limited	Financial Results
AU Small Finance Bank Limited	Financial Results/Dividend/Fund Raising

City Union Bank Limited	Financial Results/Dividend/Bonus
Garden Reach Shipbuilders & Engineers Limited	Financial Results/Dividend
Huhtamaki India Limited	Financial Results
Jagsonpal Pharmaceuticals Limited	Financial Results/Dividend
Jindal Saw Limited	Financial Results/Dividend
Kirloskar Pneumatic Company Limited	Financial Results/Dividend/Stock Split
Mahindra Holidays & Resorts India Limited	Financial Results
Nippon Life India Asset Management Limited	Financial Results/Dividend
Piramal Finance Limited	Financial Results/Dividend
Plastiblends India Limited	Financial Results/Dividend
Prataap Snacks Limited	Financial Results/Dividend
Punjab & Sind Bank	Financial Results/Dividend
Rallis India Limited	Financial Results/Dividend
Rossari Biotech Limited	Financial Results/Dividend
SBI Cards and Payment Services Limited	Financial Results
Supreme Industries Limited	Financial Results/Dividend
Tamilnad Mercantile Bank Limited	Financial Results/Dividend
The Phoenix Mills Limited	Financial Results/Dividend
Unicommerce Esolutions Limited	Financial Results
Varun Beverages Limited	Financial Results/Dividend
Websol Energy System Limited	Financial Results/Dividend
UltraTech Cement Limited	Financial Results/Dividend

(Source: NSE)

Corporate Actions as on 27/04/2026

360 ONE WAM LIMITED	Interim Dividend - Rs 6 Per Share
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(Source: NSE)

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