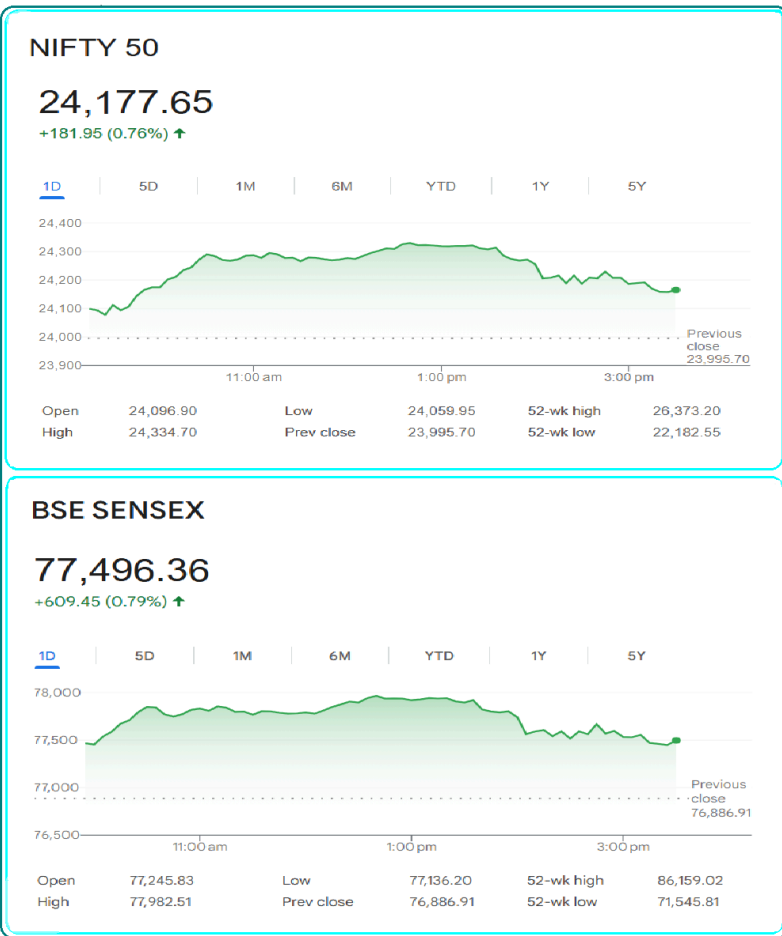


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24177.65	23995.70	0.76%
S&P BSE SENSEX	77496.36	76886.91	0.79%
NIFTY MID100	60376.90	60419.40	-0.07%
NIFTY SML100	18093.15	17976.10	0.65%

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

Market Wrap Up

- The domestic equity benchmarks closed sharply higher, supported by strong corporate earnings and rising optimism about a possible early resolution to the ongoing Middle East conflict, among other positive cues that boosted investor sentiment. The Nifty 50 ended above the 24,150 mark.
- The S&P BSE Sensex climbed 609.45 points or 0.79% to 77,496.36. The Nifty 50 index jumped 181.95 points or 0.76% to 24,177.65.
- The BSE 150 MidCap Index shed 0.01% and the BSE 250 SmallCap Index rose 0.54%.
- Among the sectoral indices, the Nifty FMCG index (up 1.75%), the Nifty Realty index (up 1.48%), and the Nifty Auto index (up 1.15%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 0.49%), the Nifty PSU Bank index (down 0.41%) and the Nifty Consumer Durables index (down 0.40%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **May** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **2674** contracts at the end of the day.
- **Long** position build up for the **May** series has been witnessed in **RELIANCE, ONGC, BHARTIARTL**.
- **Short** position build up for the **May** series has been witnessed in **SBIN, ICICIBANK, HDFCBANK**.
- **Unwinding** position for the **May** series has been witnessed in **INFY, TATAPOWER**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55403.60	55400.35	0.01%
NIFTY AUTO	26085.75	25790.35	1.15%
NIFTY FMCG	51771.80	50882.75	1.75%
NIFTY IT	29245.20	28959.90	0.99%
NIFTY METAL	13111.35	13046.45	0.50%
NIFTY PHARMA	23260.85	23158.15	0.44%
NIFTY REALTY	805.60	793.85	1.48%
BSE CG	77962.97	77941.87	0.03%
BSE CD	59705.18	59961.76	-0.43%
BSE Oil & GAS	27926.53	27839.05	0.31%
BSE POWER	8176.61	8263.57	-1.05%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	59917.46	-
HANG SENG	26111.84	25679.78	1.68%
STRAITS TIMES	4860.97	4887.69	-0.55%
SHANGHAI	4107.51	4078.64	0.71%
KOSPI	6690.90	6641.02	0.75%
JAKARTA	7101.23	7072.39	0.41%
TAIWAN	39303.50	39521.73	-0.55%
KLSE COMPOSITE	1720.42	1729.60	-0.53%
ALL ORDINARIES	8915.70	8935.00	-0.22%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	139280.19	138087.33
NSE F&O	154880.78	348149.82

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2468.42

(Source: [NSE](#))

Corporate News

- Vedanta Ltd** reported a sharp rise in its fiscal fourth-quarter earnings, with consolidated net profit rising 89% year-on-year to Rs 9,352 crore. Consolidated revenue for the January-March quarter rose 29% year-on-year to Rs 51,524 crore
- Federal Bank** reported a 22% jump in consolidated net profit for the quarter ended March. The Kochi-based lender posted a net profit of Rs 1,259.1 crore in Q4FY26, as compared to Rs 1,030.2 crore in the prior corresponding period. NII arrived at Rs 3,173 crore for the March quarter, as compared to Rs 2,377 crore in the previous corresponding quarter, representing a 56% rise on a year-on-year basis. The bank further declared a dividend of Rs Rs.1.20 per equity share of face value Rs. 2 each (60%) for the financial year 2025-26.
- Ceat** posted consolidated net sales at Rs 4,218.89 crore in March 2026 up 23.34% from Rs. 3,420.62 crore in March 2025. Net profit at Rs. 243.84 crore in March 2026 up 145.09% from Rs. 99.49 crore in March 2025.
- Indian Bank** posted consolidated net profit rose 6.42% to Rs 3173.05 crore in the quarter ended March 2026 as against Rs 2981.64 crore during the previous quarter ended March 2025. Total Operating Income rose 10.27% to Rs 17488.50 crore in the quarter ended March 2026 as against Rs 15859.63 crore during the previous quarter ended March 2025.
- Sterlite Technologies** posted consolidated net profit to Rs 59.00 crore in the quarter ended March 2026 as against net loss of Rs 40.00 crore during the previous quarter ended March 2025. Sales rose 36.98% to Rs 1441.00 crore in the quarter ended March 2026 as against Rs 1052.00 crore during the previous quarter ended March 2025.
- Granules India** posted consolidated net profit rose 32.59% to Rs 201.57 crore in the quarter ended March 2026 as against Rs 152.03 crore during the previous quarter ended March 2025. Sales rose 21.78% to Rs 1457.43 crore in the quarter ended March 2026 as against Rs 1196.82 crore during the previous quarter ended March 2025.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ITC	316.25	304.45	3.88%
TECHM	1459.80	1408.10	3.67%
MARUTI	13257.00	12892.00	2.83%
COALINDIA	479.90	467.00	2.76%
RELIANCE	1425.40	1388.90	2.63%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	4345.20	4442.40	-2.19%
DRREDDY	1329.80	1354.60	-1.83%
NTPC	401.30	406.85	-1.36%
ICICIBANK	1281.00	1292.00	-0.85%
BAJAJFINSV	1764.20	1779.00	-0.83%

(Source: [Moneycontrol](#))

- **IndusInd Bank** executives are now facing inquiries from law enforcement as two separate incidents of alleged assault by recovery agents over credit card debts come to light. Amid growing concerns, the Reserve Bank of India demands clarification on the bank's collection practices. Investigations into the bank's recovery protocols are underway, intensified by a viral video showcasing the incident.

- **Indian Overseas Bank** posted consolidated net profit rose 42.51% to Rs 1556.15 crore in the quarter ended March 2026 as against Rs 1091.94 crore during the previous quarter ended March 2025. Total Operating Income rose 11.19% to Rs 8488.96 crore in the quarter ended March 2026 as against Rs 7634.81 crore during the previous quarter ended March 2025.

- **Dr Reddy's Laboratories** has secured market authorization from Health Canada for its generic semaglutide injection. This marks a significant achievement as the first company to receive approval for this diabetes treatment in Canada.

- **Tata Motors** achieved a record with 144 patent applications in FY26. These innovations target vehicle safety, reliability, and occupant comfort. The company is also investing in sustainable mobility, including electric and hydrogen-powered vehicles.

- **Coal India Ltd** is developing a 10-year roadmap to eliminate 243 MT of coal imports by boosting domestic production, improving coal quality, and achieving logistics cost parity. The plan includes a forensic audit of imports, sector-specific policies, and a National Washery & Logistics Grid to address supply chain bottlenecks and enhance energy security.

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

Global News

- U.S. private employers added an average of 39,250 jobs per week in the four weeks ending April 11, 2026.
- U.S. Conference Board said its consumer confidence index crept up to 92.8 in April from an upwardly revised 92.2 in March.
- U.S. house prices were unchanged in February 2026, after four consecutive months of rises. Year-over-year, house prices rose 1.7% in February.
- Eurozone bank lending to households rose 3% year-on-year to EUR 7.189 trillion in March 2026. Lending to businesses increased to 3.2% in March from 3%. The M3 money supply rose 3.3% year-on-year to EUR 17,344.7 billion in January 2026, up from 2.8% in December.
- Eurozone Economic Sentiment Indicator (ESI) fell for the third consecutive month to 93.0 in April 2026. The consumer

confidence was confirmed at -20.6 in April 2026, compared to -16.4 in the prior month.

- Australia's annual inflation jumped to 4.6% in March 2026 from 3.7% in the prior month. Monthly, CPI accelerated 1.1% after being flat in February.

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

Economic News

- Crude Oil traded at US\$ 103.21/bbl (IST 17:00).
- INR weakened to Rs. 94.86 from Rs. 94.56 against each US\$ resulting in daily change of 0.32%.
- India's crude imports fell as West Asia disruptions hit supplies, with average intake dropping to 4.4 million barrels per day in April 1-26, about 15% below February levels. However, steady flows from Saudi Arabia and higher shipments from the UAE helped offset some of the shortfall, alongside renewed imports from Iran and Venezuela and continued purchases from Russia.
- In a bid to streamline tax compliance, India's markets regulator Sebi is actively negotiating with the CBDT, the country's tax authority. The proposal on the table suggests that foreign portfolio investors (FPIs) should have the autonomy to designate authorized signatories.
- The government has said it is not considering any proposal to raise petrol or diesel prices from May 1, according to a petroleum ministry official. The clarification comes amid speculation of an imminent fuel price hike after key state elections, which has led to panic buying and long queues at fuel stations in some areas.
- In a bid to strengthen worker protections, the Labour and Employment Ministry is launching a comprehensive inspection program. This proactive approach will target businesses that fail to register with the Employees' Provident Fund Organisation.
- India is leading the global fight against climate challenges. Agriculture production reached 357 million tonnes in 2024-25. Jammu and Kashmir Lieutenant Governor Manoj Sinha urged scientists and stakeholders to build climate resilience. He emphasized bold, science-led, farmer-focused transformation and climate-resilient crops. Policies must champion climate-adapted varieties. Farms are the bedrock of civilization and economies.
- India has made a strategic move by approving the export of an additional 25 lakh tonnes of wheat, marking a total of 50 lakh tonnes now permitted for international markets. Moreover, exports of wheat products have been expanded by 10 lakh tonnes.
- India has approved a significant Rs. 3,000-crore currency swap for the Maldives. This move aims to bolster the island nation's economy under the SAARC framework. The facility will help the Maldives manage foreign exchange needs and economic pressures. This support underscores the strong partnership between India and the Maldives.
- Indian consumer goods maker AWL Agri Business is grappling with a roughly 20% surge in some crude-linked input costs as the Middle East conflict drives up prices for fuel.
- India has initiated a probe into aluminium wire imports from Malaysia. This comes as existing import duties are scheduled to expire in September. Several Indian companies have requested a review to determine if these duties need to

be extended. The government's announcement was made late on Monday. This investigation could impact future trade dynamics.

- The US has announced a preliminary anti-dumping duty of 123.04% on solar cells and modules from India, a move expected to further restrict shipments to the key market, though most manufacturers are said to have already diversified exports.

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

Forthcoming Events

Board Meetings as on 30/04/2026

Hindustan Unilever Limited	Financial Results/Dividend
Adani Enterprises Limited	Financial Results/Dividend
Adani Ports and Special Economic Zone Limited	Financial Results/Dividend
Bajaj Finserv Limited	Financial Results/Dividend
ACC Limited	Financial Results/Dividend
5Paisa Capital Limited	Financial Results/Fund Raising
Acutaas Chemicals Limited	Financial Results/Dividend
Aster DM Healthcare Limited	Financial Results
Bank of India	Fund Raising
Central Bank of India	Financial Results/Dividend/Fund Raising
Cholamandalam Investment and Finance Company Limited	Financial Results/Dividend
Dr. Lal Path Labs Ltd.	Financial Results/Dividend
Edelweiss Financial Services Limited	Financial Results/Dividend
Equitas Small Finance Bank Limited	Financial Results
ESAF Small Finance Bank Limited	Financial Results
Eveready Industries India Limited	Financial Results/Dividend
GHCL Textiles Limited	Financial Results/Dividend
Go Fashion (India) Limited	Financial Results
Godrej Agrovet Limited	Financial Results/Dividend
HFCL Limited	Financial Results/Dividend
IDBI Bank Limited	Financial Results
Ideaforge Technology Limited	Financial Results
Indiamart Intermesh Limited	Financial Results/Dividend
Indus Towers Limited	Financial Results/Dividend
JBM Auto Limited	Financial Results/Dividend
JHS Svendgaard Retail Ventures Limited	Fund Raising
Kajaria Ceramics Limited	Financial Results/Dividend/Buyback
Ksb Limited	Financial Results
Ksolves India Limited	Financial Results

Laurus Labs Limited	Financial Results/Dividend
LG Balakrishnan & Bros Limited	Financial Results/Dividend
Mazagon Dock Shipbuilders Limited	Financial Results/Dividend
MOIL Limited	Financial Results/Dividend
National Aluminium Company Limited	Financial Results/Dividend
Newgen Software Technologies Limited	Financial Results/Dividend
PCBL Chemical Limited	Financial Results
Power Grid Corporation of India Limited	Fund Raising
PSP Projects Limited	Financial Results
R R Kabel Limited	Financial Results/Dividend
Railtel Corporation Of India Limited	Financial Results/Dividend
Servotech Renewable Power System Limited	Financial Results/Dividend
Silver Touch Technologies Limited	Financial Results
SIS LIMITED	Financial Results
Smartworks Coworking Spaces Limited	Financial Results
Sona BLW Precision Forgings Limited	Financial Results/Dividend
Sundram Fasteners Limited	Financial Results/Dividend
Tara Chand InfraLogistic Solutions Limited	Financial Results
Ujaas Energy Limited	Financial Results
Usha Martin Limited	Financial Results/Dividend

(Source: NSE)

Board Meetings as on 30/04/2026

ABB India Limited	Dividend - Rs 29.59 Per Share
Embassy Office Parks REIT	Distribution - Rs 6.50 Per Unit Consisting Of Re 0.14 Per Unit As Interest/ Rs 1.39 Per Unit As Dividend/ Rs 4.97 Per Unit As Repayment Of Spv Level Debt
Hindustan Zinc Limited	Interim Dividend - Rs 11 Per Share
Interise Trust	Distribution - Rs 1.25 Per Unit Consist Of Rs 0.68 Per Unit As Interest/ Re 0.57 Per Unit As Dividend
Tanla Platforms Limited	Interim Dividend - Rs 6 Per Share
Varun Beverages Limited	Interim Dividend - Re 0.50 Per Share
Vedanta Limited	Demerger
Vesuvius India Limited	Dividend - Rs 1.50 Per Share

(Source: NSE)

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