



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,248.61	82,220.48	82,246.17	81,159.15	81,287.19	-961.42	-1.17
NIFTY	25,496.55	25,459.85	25,476.40	25,141.30	25,178.65	-317.90	-1.25

INDICES CLOSED THE WEEK IN RED

The 30-share BSE Sensex was down by 961.42 points or 1.17% to settle at 81,287.19 and the Nifty was down by 317.90 points or 1.25% to settle at 25,178.65. The BSE Small Cap 250 was down by 0.86% and BSE 500 was down by 1.16%. On the sectoral front, IT were gainer index. On the flip side, Realty, Metal, Healthcare, Auto, Consumer Durables, Banks, Capital Goods, Oil & Gas and FMCG were losing indices. HCL Tech, Trent, Infosys, Eternal and NTPC were top gainers on the Sensex; on the flip side, Sunpharma, Bharti Airtel, Mahindra & Mahindra, Bajaj Finserv and Indigo were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TRENT	3,908.00	3,856.00	1.35
INFY	1,298.90	1,289.10	0.76
HCLTECH	1,382.00	1,373.50	0.62
APOLLOHOSP	7,818.00	7,775.00	0.55
ETERNAL	247.50	246.50	0.41

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ADANIEN	2,157.00	2,216.40	-2.68
MARUTI	14,832.00	15,213.00	-2.50
BHARTIARTL	1,882.00	1,929.60	-2.47
GRASIM	2,794.00	2,863.50	-2.43
SUNPHARMA	1,742.90	1,785.70	-2.40

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,46,20,755	887.45	3,080.14
INFY	2,31,41,724	1,298.90	3,019.56
BHARTIARTL	1,37,54,648	1,882.00	2,589.93
ICICIBANK	1,50,96,898	1,379.40	2,091.90
RELIANCE	1,20,31,440	1,394.90	1,681.35

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	5,72,72,916	247.50	1,422
HDFCBANK	3,46,20,755	887.45	3,080.1
TATASTEEL	2,55,98,534	212.59	546.66
INFY	2,31,41,724	1,298.90	3,019.5
BEL	2,27,32,811	442.10	1,011.8



Indian equity benchmarks ended sharply lower on Friday ahead of India's GDP growth rate data, which will be due later in the day. Markets made a negative start and extended their losses amid a weak trend in global markets and fresh foreign fund outflows. Selling pressure intensified in the final leg of trade, dragging indices deeper into the red, with losses of around 1.2%, as traders remained cautious after the latest round of Iran-U.S. nuclear talks in Geneva concluded without any agreement. Traders took note of the rating agency ICRA has estimated that Indian companies to sustain favourable Year-on-Year (Y-o-Y) revenue growth of 8-10% in Q4 2025-26 (vis-a-vis 10.6% YoY increase in Q3 2025-26). Traders overlooked that the Commerce Ministry has said India and Israel are likely to hold the next round of in-person negotiations in May 2026 in Israel, with the aim of fast-tracking the free trade agreement (FTA) process.

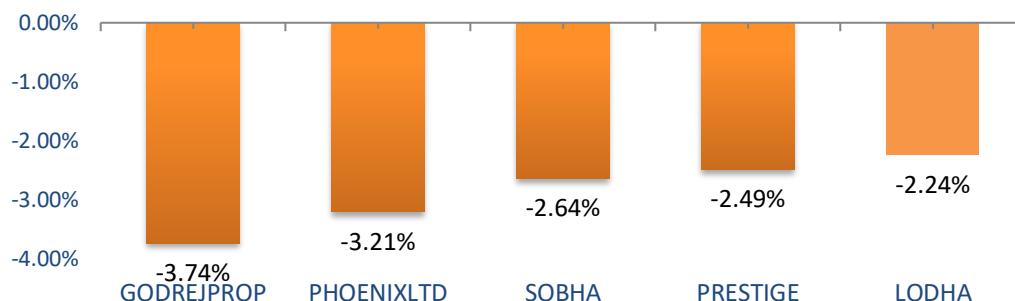
On the global front, European equity markets traded mostly in green despite lingering concerns regarding artificial-intelligence related layoffs and workforce disruption. Asian markets ended mixed as Nvidia's strong earnings and guidance failed to dispel investors' fears over the durability of an AI boom.

Source: Ace Equity

NEWS BULLETIN

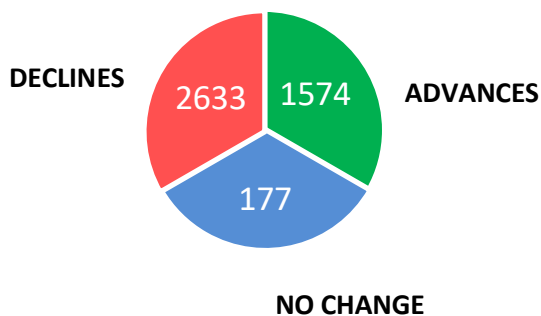
- **ITCONS E-Solutions** has bagged a new contract from the Hindustan Aeronautics, Department of Defence Production, Ministry of Defence, to provide 43 resources for a period of 2 year. The total contract value is Rs 2.61 crore inclusive of all taxes and duties.
- **Kirloskar Brothers** has received contract from Adani Power and its subsidiaries namely, Anuppur Thermal Energy (MP) and Korba Power, for supply of circulating water pumps (Concrete volute pump technology) and auxiliary cooling water pumps, aggregating to Rs 214 crore. This is a prestigious contract for the company for supply of pump packages for thermal power projects in the states of Madhya Pradesh, Assam, Chhattisgarh and Bihar.

MARKET DRIVING SECTOR : REALTY

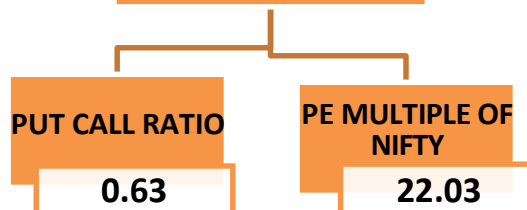


S&P BSE: REALTY
CLOSING: - 6,067.58
CHANGE: - 139.95
CHANGE: - 2.25%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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