



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,562.90	77,319.33	77,429.33	76,347.90	76,631.65	-931.25	-1.20
NIFTY	23,997.35	23,909.05	23,990.75	23,682.80	23,775.10	-222.25	-0.93

PROFIT BOOKING SEEN AT HIGHER LEVELS

The 30-share BSE Sensex was down by 931.25 points or 1.20% to settle at 76,631.65 and the Nifty was down by 222.25 points or 0.93% to settle at 23,775.10. The BSE Small Cap 250 was up by 0.25% and BSE 500 was down by 0.49%. On the sectoral front, IT, Healthcare, Capital Goods and Metal gaining indices. On the flip side, Auto, FMCG, Realty, Oil & Gas, Banks and Consumer Durables were losing indices. BEL, Powergrid, NTPC, TCS and HCL Tech were gainers on the Sensex; on the flip side, Indigo, Larsen & Toubro, Eternal, HDFC Bank and ICICI Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	983.25	951.80	3.30
BAJAJ-AUTO	9,518.00	9,366.00	1.62
BEL	440.00	433.10	1.59
DRREDDY	1,210.00	1,191.40	1.56
NTPC	379.70	374.15	1.48

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
INDIGO	4,448.90	4,615.50	-3.61
JIOFIN	238.99	246.86	-3.19
LT	3,890.30	4,005.90	-2.89
SHRIRAMFIN	995.55	1,023.20	-2.70
ETERNAL	237.60	243.62	-2.47

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,88,79,392	798.00	3,913.63
ICICIBANK	2,29,23,062	1,283.50	2,950.27
RELIANCE	2,07,25,390	1,330.00	2,763.21
SBIN	2,47,72,948	1,040.45	2,595.91
INFY	1,48,94,607	1,331.50	1,974.35

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,88,79,392	798.00	3,913.6
ETERNAL	3,80,62,318	237.60	910.49
TATASTEEL	3,68,53,400	204.83	758.30
SBIN	2,47,72,948	1,040.45	2,595.9
ICICIBANK	2,29,23,062	1,283.50	2,950.2



Indian equity benchmarks snapped five-day winning streak as investors turned cautious ahead of the start of the earnings season. Market participants were closely watching Tata Consultancy Services' result, which is set to be announced later in the day. After making slightly negative start, soon indices extended their losses, amid renewed uncertainty over the US-Iran ceasefire after Iran accused the US of violating the terms of the two-week agreement. Traders overlooked the World Bank's South Asia Economic Update (April 2026) report, which marginally raised India's growth projections for FY27 by 30 basis points to 6.6%, compared to its October 2025 forecast of 6.3%. Traders took note of report that the Reserve Bank of India (RBI) has underscored the improvement in asset quality of Indian scheduled commercial banks, stating that their gross non-performing assets (NPAs) ratio has declined further to 2% in December 2025.

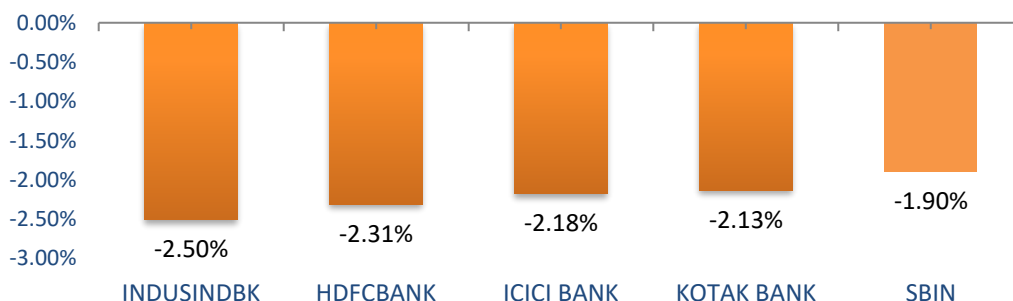
On the global front, European markets were trading in red, while Asian markets ended mostly lower after Iran accused the US of violating the terms of the two-week ceasefire agreement reached a day before.

Source: AceEquity

NEWS BULLETIN

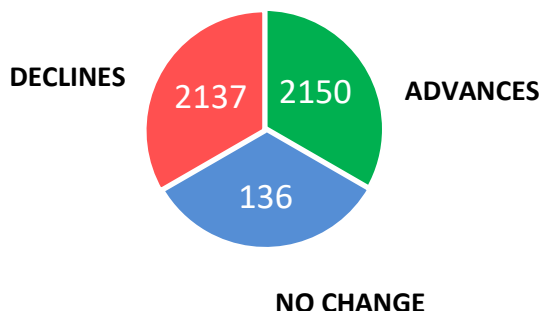
- **Premier Energies** has received orders aggregating to Rs 2,577 crore in Q4 FY 2026 for supply of 1,600 MW solar cells and modules. Execution of these orders is scheduled across FY 2027 and 2028.
- **CFF Fluid Control** has received the contract for procurement of various Equipment for Navy Various Program from NHQ The Directorate of Procurement, Delhi (Indian Navy) totalling to around Rs 78.74 crore (Including Tax). The order is to be delivered by April 2027.
- **Anand Rathi Wealth** has reported 41.14% rise in its net profit at Rs 102.23 crore for the quarter under review as compared to Rs 72.43 crore for the same quarter in the previous year. The total income of the company has increased by 48.52% at Rs 344.16 crore for Q4FY26 as compared to Rs 231.73 crore for the corresponding quarter previous year.

MARKET DRIVING SECTOR : BANK

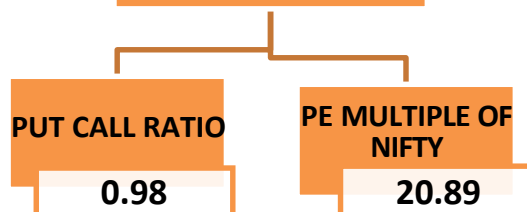


S&P BSE: BANK
CLOSING: 61,710.92
CHANGE: - 990.76
CHANGE: - 1.58%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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