

COMMENTARY

20th APRIL 2026

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,493.54	78,632.90	78,942.45	78,203.30	78,520.30	+26.76	+0.03
NIFTY	24,353.55	24,391.50	24,480.65	24,241.25	24,364.85	+11.30	+0.05

MARKET ENDED THE DAY ON A FLAT NOTE

The 30-share BSE Sensex was up by 26.76 points or 0.03% to settle at 78,520.30 and the Nifty was up by 11.30 points or 0.05% to settle at 24,364.85. The BSE Small Cap 250 was down by 0.15% and BSE 500 was down by 0.02%. On the sectoral front, Auto, Capital Goods, Bank, Oil & Gas and Consumer Durables were gaining indices. On the flip side, Realty, FMCG, Metal, IT, Healthcare, were the losing indices. Trent, SBI Bank, Asian Paint, NTPC and Bajaj Finance were gainers on the Sensex; on the flip side, Larsen & Toubro, BEL, HCL Tech, Kotak Bank and Bajaj Finserv 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TRENT	4,235.1	4,107.7	3.10
JSWSTEEL	1,275.0	1,240.3	2.80
SBIN	1,104.0	1,080.2	2.20
ASIANPAINT	2,510.0	2,464.0	1.87
NTPC	398.35	393.60	1.21

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	236.60	243.86	-2.98
HINDALCO	1,013.1	1,039.0	-2.49
TMPV	354.60	360.10	-1.53
LT	4,039.0	4,096.1	-1.39
HDFCLIFE	608.75	616.45	-1.25

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	5,21,48,044	795.20	4,155.8
SBIN	3,11,79,584	1,104.0	3,459.0
ICICIBANK	2,15,51,520	1,354.3	2,936.5
RELIANCE	1,36,14,733	1,361.1	1,859.6
BHARTIARTL	92,43,641	1,842.0	1,711.1

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	5,21,48,044	795.20	4,155.8
ETERNAL	3,92,83,935	253.53	998.40
JIOFIN	3,84,15,130	236.60	913.51
SBIN	3,11,79,584	1,104.0	3,459.0
WIPRO	2,79,27,164	202.40	567.45



Indian equity benchmarks ended flat with positive bias on Monday amid uncertainty surrounding the US-Iran peace talks. After making a cautious start, soon indices gained momentum and traded in the green supported by continued foreign institutional investor (FII) inflows and strong quarterly earnings from major private banks. However, in the late afternoon session, the markets gave up most of their gains and settled near the neutral lines with marginal gains. India's forex reserves rise by \$3.825 billion: Some support came as the Reserve Bank of India (RBI) said that India's forex reserves jumped by \$3.825 billion to \$700.946 billion during the week ended April 10.

Commerce Ministry rolls out set of reforms to speed up export approvals: Traders took note of report that the Ministry of Commerce and Industry has rolled out a set of reforms to improve the functioning of Norms Committees under the Directorate General of Foreign Trade (DGFT), aiming to speed up Advance Authorisation approvals and simplify procedures for exporters

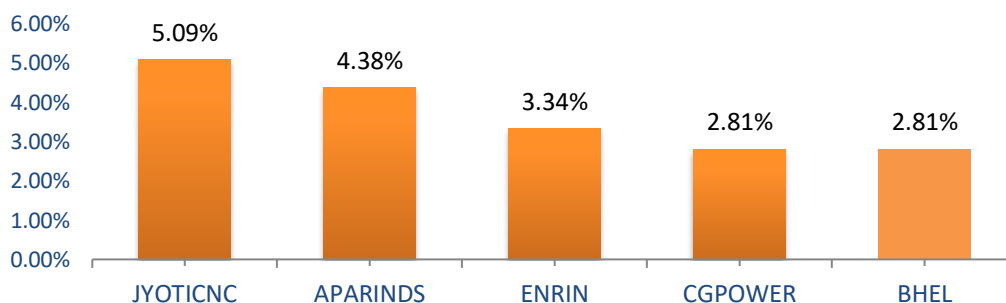
On the global front: European markets were trading in red amid renewed tensions between the United States and Iran. Asian markets ended mostly higher, ahead of the second round of diplomatic talks between the United States and Iran.

Source: AceEquity

NEWS BULLETIN

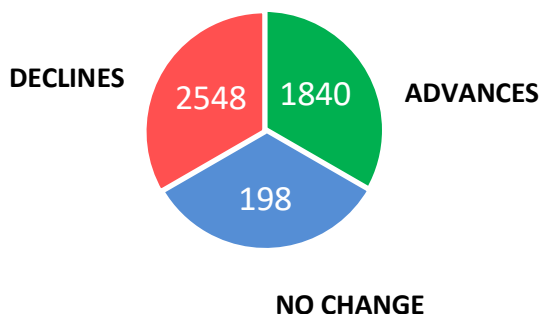
- **Bondada Engineering** along with subsidiaries has secured multiple orders aggregating to Rs 3.94 crore. These orders strengthen the Company's order book across telecom infrastructure, railway safety systems, and energy-efficient lighting solutions, further reinforcing its diversified business model.
- **Praj Industries** has established an Advanced Precision Fermentation Lab at Praj Matrix to drive next-generation biotechnology and accelerate India's transition to high-performance, low-carbon bio manufacturing.
- **Billionbrains Garage Ventures (Groww)** has reported over 2-fold jump in its net profit at Rs 541.36 crore for fourth quarter ended March 31, 2026 (Q4FY26) as compared to Rs 251.20 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : CAPITAL GOODS

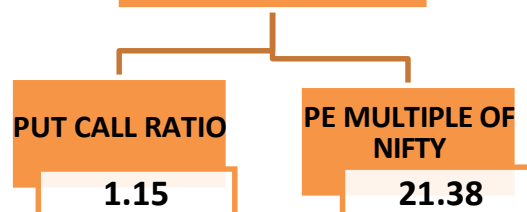


S&P BSE: CAPITAL GOODS
CLOSING: 76,533.10
CHANGE: +420.89
CHANGE: +0.55%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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