

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,516.49	77,983.66	78,178.54	77,574.18	77,664.00	-852.49	-1.09
NIFTY	24,378.10	24,202.35	24,310.20	24,134.80	24,173.05	-205.05	-0.84

INDICES IN RED AMID ESCALATING GEO-POLITICAL TENSIONS

The 30-share BSE Sensex was down by 852.49 points or 1.09% to settle at 77,664.00 and the Nifty was down by 205.05 points or 0.84% to settle at 24,173.05. The BSE Small Cap 250 was down by 0.49% and BSE 500 was down by 0.78%. On the sectoral front, Healthcare and Capital Goods were gaining indices. On the flip side, Auto, IT, Metal, FMCG, Realty, Oil & Gas, Banks and Consumer Durables were losing indices. Adani Ports, Larsen & Toubro, Sunpharma, Bharti Airtel and BEL were gainers on the Sensex; on the flip side, Trent, Mahindra & Mahindra, Bajaj Finserv, Tech Mahindra and Infosys 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
DRREDDY	1,325.0	1,217.0	8.87
CIPLA	1,307.0	1,236.3	5.72
JIOFIN	248.50	238.51	4.19
ADANIANT	2,301.0	2,260.8	1.78
COALINDIA	450.90	444.15	1.52

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TRENT	4,244.0	4,434.5	-4.30
SHRIRAMFIN	1,010.0	1,044.5	-3.31
TECHM	1,416.9	1,462.6	-3.12
BAJAJFINSV	1,786.4	1,842.9	-3.07
INFY	1,231.8	1,268.6	-2.90

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,76,77,616	783.90	2,969.49
ICICIBANK	2,01,11,792	1,347.0	2,712.94
RELIANCE	1,63,85,079	1,344.4	2,208.45
DRREDDY	1,64,07,707	1,325.0	2,157.19
TRENT	48,02,737	4,244.0	2,081.97

Most Active (by volume)			
Name	Qty	Pr.	Value CR
JIOFIN	7,44,32,271	248.50	1,831.7
HDFCBANK	3,76,77,616	783.90	2,969.4
ETERNAL	3,38,33,959	259.35	879.24
KOTAKBANK	2,76,28,052	371.45	1024.7
WIPRO	2,03,07,250	202.87	413.11



Indian equity benchmarks ended near day's low points on Thursday, amid escalating geopolitical tensions after Iran seized two vessels in the Strait of Hormuz and fired at ships in the region. Markets made a gap-down opening and remained under selling pressure throughout the session, as traders were cautious after foreign investors remained net sellers for a second consecutive session. Some cautiousness came as the RBI data showed that net sales growth of the select foreign direct investment (FDI) companies moderated to 8.7 per cent in 2024-25 from 9.4 per cent in the previous year. Traders remained cautious as domestic ratings agency ICRA stated that bank credit growth is likely to moderate to under 12 per cent in this financial year from 15.6 per cent achieved in FY26, largely due to the West Asia conflict and the evolving interest rate dynamics.

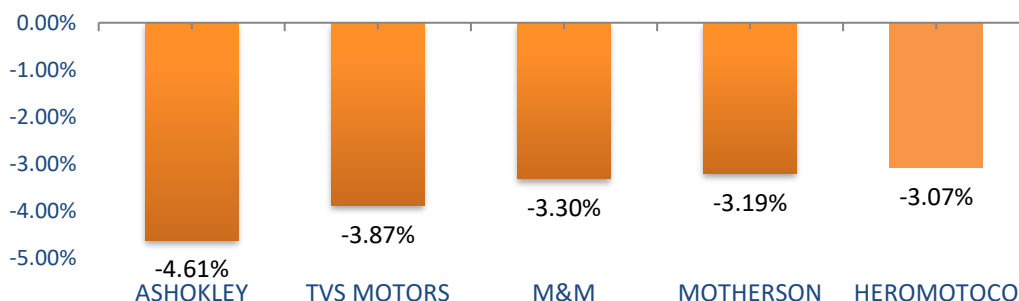
On the global front, European markets were trading mostly in red amid escalating geopolitical tensions after Iran fired on three ships in the Strait of Hormuz and seized two of them for 'maritime violations', in the region. Asian markets ended mostly higher amid the continued closure of the critical Strait of Hormuz.

Source: AceEquity

NEWS BULLETIN

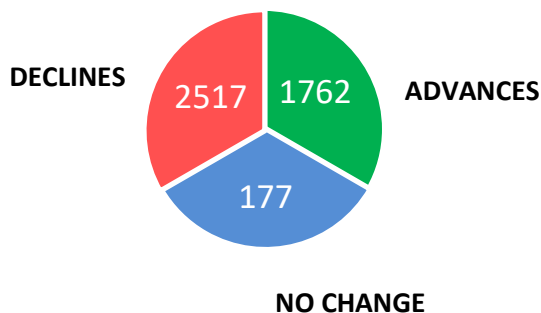
- **Trent** has reported 29.96% rise in its net profit at Rs 454.75 crore for the fourth quarter ended March 31, 2026 as compared to Rs 349.92 crore for the same quarter in the previous year. The total income of the company has increased by 18.90% at Rs 4,997.71 crore for Q4FY26 as compared to Rs 4,203.14 crore for the corresponding quarter previous year.
- **Tata Communications** has reported 75.79% fall in its net profit of Rs 168.75 crore for fourth quarter ended March 31, 2026 (Q4FY26) as compared to net profit of Rs 697.10 crore for the same quarter in the previous year. However, total income of the company increased by 2.37% at Rs 1,984.46 crore for Q4FY26 as compared Rs 1,938.49 crore for the corresponding quarter previous year.

MARKET DRIVING SECTOR : AUTO



S&P BSE: AUTO
CLOSING: 57,125.80
CHANGE: - 1,326.21
CHANGE: - 2.27%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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