

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,664.00	77,483.80	77,710.82	76,403.87	76,664.21	-999.79	-1.29
NIFTY	24,173.05	24,100.55	24,206.00	23,813.65	23,897.95	-275.10	-1.14

## MARKET ENDED IN RED AMID UNCERTAIN GLOBAL CUES

The 30-share BSE Sensex was down by 999.79 points or 1.29% to settle at 76,664.21 and the Nifty was down by 275.10 points or 1.14% to settle at 23,897.95. The BSE Small Cap 250 was down by 1.16% and BSE 500 was down by 1.06%. On the sectoral front, there was no gaining index. On the flip side, Realty, FMCG, Metal, Healthcare, Oil & Gas, Capital Goods, Consumer Durables, IT, Auto and Bank were the losing indices. Trent, Bajaj Finance, SBI Bank, HDFC Bank and Kotak Bank were gainers on the Sensex; on the flip side, Infosys, HCL Tech, TCS Tech Mahindra and Sun Pharma were the top losers on the Sensex. On global front, Asian markets shut the day on a mixed note and European indices are trading on a negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
COALINDIA	455.00	450.65	0.97
TRENT	4,290.0	4,251.4	0.91
HINDALCO	1,049.5	1,041.3	0.78
NESTLEIND	1,420.0	1,410.5	0.67
SHRIRAMFIN	1,016.0	1,009.3	0.66

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,154.8	1,240.6	-6.92
TCS	2,401.0	2,521.8	-4.79
TECHM	1,361.8	1,421.5	-4.20
HCLTECH	1,202.5	1,277.6	-4.08
SUNPHARMA	1,618.5	1,680.1	-3.67

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
INFY	4,20,78,849	1,154.8	4,949.5
HDFCBANK	2,77,20,326	785.15	2,170.4
ICICIBANK	1,40,56,722	1,325.8	1,872.8
RELIANCE	1,17,44,302	1,331.0	1,565.5
SUNPHARMA	96,06,128	1,618.5	1,564.4

Most Active (by volume)			
Name	Qty	Pr.	Value CR
INFY	4,20,78,914	1,154.8	4,949.5
WIPRO	3,93,63,394	199.45	784.63
ETERNAL	3,33,65,767	257.35	851.69
JIOFIN	3,27,01,729	245.80	808.68
HDFCBANK	2,77,20,358	785.15	2,170.4



Indian equity benchmarks ended sharply lower on Friday dragged by heavy selling pressure in IT and Tech sector stocks. Markets made a gap-down opening and maintained their losses throughout the session, amid supply disruptions and escalating tensions around the Strait of Hormuz. Some cautiousness came as RBI bulletin said persistent conflict in West Asia and supply chain disruptions could pose challenges to the domestic economy in the form of higher energy costs, input cost pressures, disruption in trade flows and financial market spillovers. Traders remained cautious with the EEPCC data showing that the country's engineering exports plunged 66.8 per cent to the UAE and 45 per cent to Saudi Arabia in March due to the West Asia crisis, which has impacted cargo ships movement in international waters.

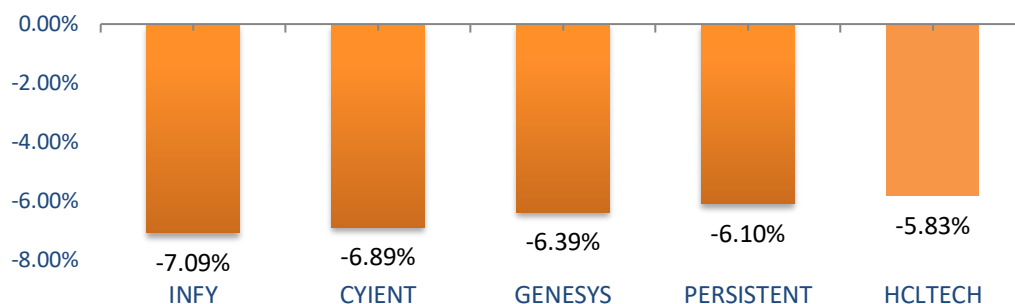
On the global front: European markets were trading in the red, while Asian markets ended mostly lower amid escalating geopolitical tensions, as US-Iran tensions persisted over control of the Strait of Hormuz.

Source: AceEquity

## NEWS BULLETIN

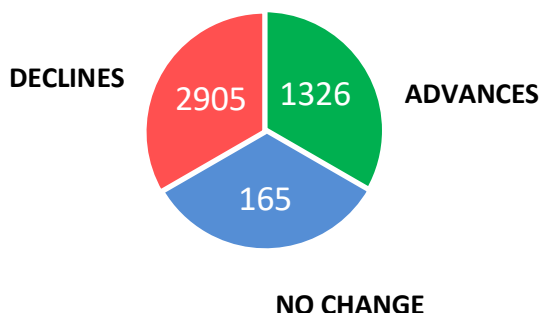
- **Tata Power Company** has incorporated a wholly-owned subsidiary in the name of 'TP Urja'. TP Urja will engage in providing power and energy services and undertake activities related to other forms of energy.
- **Larsen & Toubro (L&T)** has entered the B2B industrial electronics space with the commencement of industrial electronics manufacturing at its Coimbatore campus in Tamil Nadu.
- **Balrampur Chini Mills** has received approval for issuance of Listed, Secured, Non-Convertible Debentures (NCDs) amount of aggregating up to Rs 200 crore on private placement basis. The Board of Directors of the company at their meeting held on April 23, 2026 inter alia, considered and approved the same.

## MARKET DRIVING SECTOR : IT

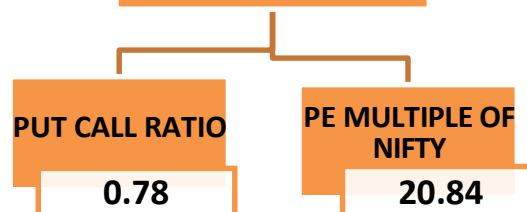


**S&P BSE: IT**  
**CLOSING: 27,648.74**  
**CHANGE: -1,495.73**  
**CHANGE: -5.13%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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