



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,958.52	78,339.24	78,384.70	77,713.21	77,844.52	-114.00	-0.15
NIFTY	24,330.95	24,398.50	24,482.10	24,284.00	24,326.65	-04.30	-0.02

INDICES CLOSED THE DAY ON A FLAT NOTE

The 30-share BSE Sensex was down by 114 points or 0.15% to settle at 77,844.52 and the Nifty was down by 04.30 points or 0.02% to settle at 24,326.65. The BSE Small Cap 250 was up by 1.07% and BSE 500 was up by 0.34%. On the sectoral front, Capital Goods, Realty, Healthcare, Metal, Banks and Auto were gaining indices. On the flip side, FMCG, IT, Oil & Gas, Consumer Durables were the losing indices. Mahindra & Mahindra, NTPC, Kotak Bank, Tata Steel and Eternal were gainers on the Sensex; on the flip side, Hindustan Unilever, TCS, Tech Mahindra, Titan and Sunpharma 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
HDFCLIFE	628.00	606.35	3.57
BAJAJ-AUTO	10,590	10,319	2.63
M&M	3,366.0	3,300.8	1.98
GRASIM	2,955.2	2,914.8	1.39
NTPC	399.90	394.85	1.28

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HINDUNILVR	2,273.0	2,317.1	-1.90
TCS	2,403.0	2,435.4	-1.33
TITAN	4,309.0	4,359.6	-1.16
TECHM	1,450.0	1,466.7	-1.14
ITC	307.55	310.70	-1.01

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,61,37,553	795.55	3,668.63
ICICIBANK	2,50,28,552	1,279.0	3,210.36
RELIANCE	1,98,16,903	1,435.5	2,850.92
SBIN	1,61,05,163	1,092.9	1,762.02
M&M	49,16,193	3,366.0	1,656.66

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,61,37,553	795.55	3,668.6
KOTAKBANK	2,72,86,751	380.45	1,033.2
ETERNAL	2,58,33,825	257.60	666.49
ITC	2,57,18,615	307.55	793.47
ICICIBANK	2,50,28,552	1,279.0	3,210.3



Indian equity benchmarks witnessed a volatile trading session on Thursday and ended marginally lower amid investors closely monitored reports suggesting that the U.S. and Iran may be nearing a deal to end their conflict. After a cautious opening, indices traded near the neutral lines. In the afternoon session, markets witnessed a sharp rebound, but failed to sustain gains and eventually settled slightly lower. Some concern also came as S&P Global in its latest 'India Forward' report, jointly done with Crisil, has lowered India's Gross Domestic Product (GDP) growth estimates for the current financial year (FY27) to 6.6 per cent from 7.1 per cent projected earlier. Traders ignored the Commerce ministry's latest data showing that India's goods and services exports rose to an all-time high of \$863.11 billion in the financial year 2025-26 (FY26), up from \$825.26 billion in the previous year, registering a growth of 4.59 per cent, despite uncertainties triggered by geopolitical tensions. Investors turned cautious amid unabated foreign fund outflows. Foreign Institutional Investors (FIIs) offloaded equities worth Rs 5,834.90 crore on Wednesday, according to exchange data.

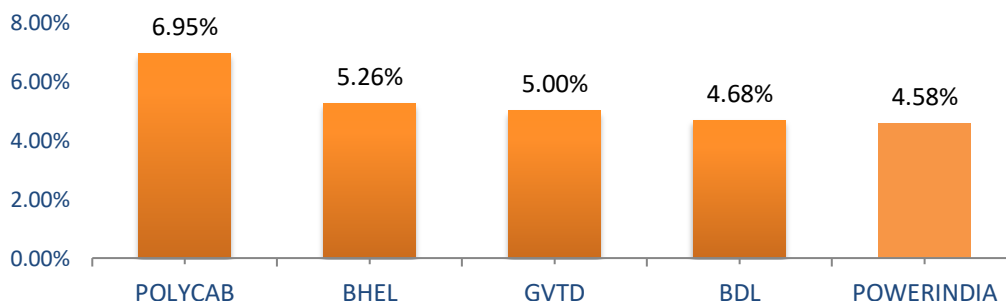
On the global front, European markets were trading in red after eurozone retail sales volumes declined by 0.1% month-over-month in March 2026. Asian markets closed higher tracking positive cues from Wall Street overnight.

Source: AceEquity

NEWS BULLETIN

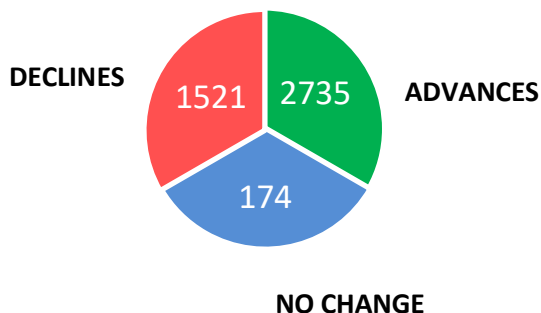
- **Bharat Forge** has reported net loss of Rs 117.76 crore for fourth quarter ended March 31, 2026 (Q4FY26) as compared to net profit of Rs 345.63 crore for the same quarter in the previous year. However, total income of the company increased by 3.52% at Rs 2,288.93 crore for Q4FY26 as compared Rs 2,211.11 crore for the corresponding quarter previous year.
- **Hero MotoCorp** has reported 29.62% rise in its net profit at Rs 1,401.13 crore for fourth quarter ended March 31, 2026 (Q4FY26) as compared to Rs 1,080.94 crore for the same quarter in the previous year. Total income of the company increased by 27.97% at Rs 13,005.16 crore for Q4FY26 as compared Rs 10,162.35 crore for the corresponding quarter previous year.

MARKET DRIVING SECTOR : CAPITAL GOODS

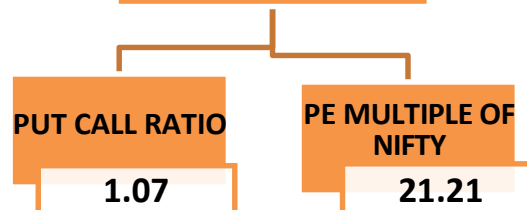


S&P BSE: CAPITAL GOODS
CLOSING: 80,320.92
CHANGE: +1,614.89
CHANGE: +2.05%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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