



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,353.55	156.8	0.65	7.38	-6.86
BSE Sensex	78,493.54	504.86	0.65	7.33	-7.86
Bank Nifty	56,565.70	479.3	0.85	9.95	-5.27
Nifty Midcap 100	59,898.20	751.45	1.27	11.30	-1.40
Nifty Smallcap 100	17,565.70	256.85	1.48	11.81	-0.79
S&P 500	7,126.06	84.78	1.20	8.38	3.90
DJIA	49,447.43	868.71	1.79	6.19	2.20
Nasdaq 100	26,672.43	339.43	1.29	11.04	5.82
Nikkei 225	58,475.90	-1042.44	-1.75	8.81	12.82
Hang Seng	26,160.33	-233.93	-0.89	3.42	-0.68
Shanghai Com	4,051.43	-4.12	-0.10	2.61	0.70

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,353.55	56,565.70
Support	24,168 & 24,103	56,045 & 55,858
Resistance	24,379 & 24,444	56,646 & 56,831

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,034.88	15,351.68	683.20
DII Cash Market	17,513.99	22,235.47	-4,721.48

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HUL	2240.80	4.75	4882.70
Nestle	1285.60	2.24	1994.20
JSW Steel	1240.30	2.09	1875.95
Apollo Hospital	7699.00	1.93	343.88
Power Grid Corp	318.10	1.87	13609.83
Top Losers			
Wipro	204.32	-2.83	80542.60
HDFC Life	616.45	-2.38	8161.00
Sun Pharma	1675.50	-1.04	3146.48
M&M	3200.20	-0.69	2180.40
L&T	4096.10	-0.58	2796.67

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	90.38	-9.07	48.77
WTI (USD/bbl)	83.85	-11.45	46.28
Gold Spot (USD/t oz.)	4,830.34	0.84	11.50
USD/INR	92.93	0.29	3.29
10 Year G-Sec India	6.905	0.25	4.91
US 10 Year Bond	4.248	-1.47	1.94

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Friday, Indian shares climbed for the second week in a row, boosted by reduced oil prices and optimism over US-Iran talks.

Global

The benchmark S&P 500 and the tech-heavy Nasdaq each rallied to their third record close in a row on Friday, while the blue-chip Dow marked its highest finish since late February, as investors cheered Iran's decision to open the Strait of Hormuz and were optimistic it could reach a deal with the United States to end their war.

Japan's Nikkei share average retreated on Friday from a record high reached the day before, as investors sold technology stocks on caution over the index's rapid gains.

Commodities & Currency :

The Indian rupee rose on Friday following a Reuters report of a central bank step to curb state-run oil companies' dollar demand, adding to measures that have narrowed the currency's underperformance over the last fortnight.

Gold prices extended gains on Friday, supported by a weaker dollar and comments from Iran's foreign minister that passage through the Strait of Hormuz remains open during the ceasefire, which pushed oil prices lower and eased some inflation concerns.

News:

Indian banks halted gold and silver import orders after the previous approval expired on March 31, 2026, leaving over 5 tonnes of gold and around 8 tonnes of silver stuck at customs due to delays in fresh government clearance.

Starlink's satellite service plans in India remain stalled as the government closely reviews Elon Musk's investment proposal amid heightened national security concerns, with the company awaiting key security clearance while officials prepare further discussions.

Walmart-owned Flipkart plans to enter India's fast-growing live events space by launching movie and concert ticket sales as early as May 2026, aiming to tap rising demand driven by concerts, sports events and higher consumer spending, while competing with players like BookMyShow and Zomato's District.

India is considering Mauritius' request for energy supplies and is exploring a government-to-government pact, while also receiving similar requests from Seychelles and other neighbours amid global fuel disruptions.

Reliance Industries has rejected two Iranian oil cargoes as they failed to meet its compliance requirements, the Indian refiner said on Friday, just days before the expiry of a US waiver that has lifted sanctions on Iranian oil exports.

Indian oil refiners are doing their best to line-up oil cargoes to meet local demand, an Indian government official said on Friday, after the United States decided not to extend a waiver from sanctions on crude purchases from Russia and Iran.

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