

Market Commentary

Overnight global action:

On 28th April 2026, US market delivered a negative performance with S&P500 down by -35.14 pts (-0.49%), Dow Jones down by -25.86 pts (-0.05%) and Nasdaq down by -276.67 pts (-1.01%). Gift Nifty declined by -11 pts (-0.05%) indicating Indian markets will open negatively. Advance-Decline ratio on NSE was 1484:1775 and on BSE was 1910:2351 which showed balance in the overall markets.

Index Options Data Analysis:

Sensex max call OI is at 77000 max put OI is at 76000 with PCR of 0.8
Nifty max call OI is at 24000 max put OI is at 23950 with PCR of 0.81
Bank Nifty max call OI is at 55400 max put OI is at 55300 with PCR of 0.89

Securities in Ban for F&O Trade:

SAIL

Sector Performance:

NIFTY AUTO index declined by -1.01% driven by Maruti Suzuki India Ltd. (-2.5%) and Samvardhana Motherson International Ltd. (-2.5%)

NIFTY FMCG index declined by -0.32% driven by Hindustan Unilever Ltd. (-1.7%) and Emami Ltd. (-1.67%)

NIFTY REALTY index declined by -0.41% driven by The Phoenix Mills Ltd. (-2.1%) and Anant Raj Ltd. (-2.1%)

NIFTY OIL & GAS index grew by 1.55% driven by Chennai Petroleum Corporation Ltd. (+7.5%) and Oil & Natural Gas Corporation Ltd. (+5.39%)

NIFTY CHEMICALS Index grew by 0.69% driven by Tata Chemicals Ltd. (+11.1%) and Aarti Industries Ltd. (+2.65%)

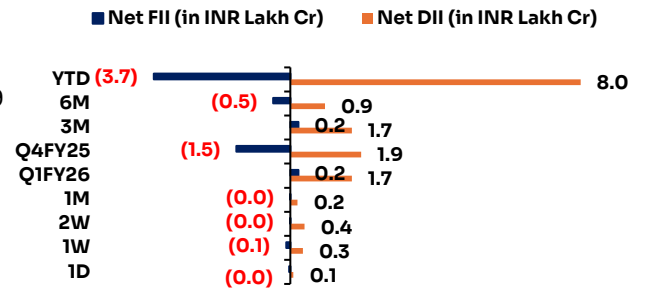
NIFTY PSU BANK index declined by -2.15% driven by Union Bank Of India (-3.2%) and Bank Of Maharashtra (-3.19%)

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Fund Flow	Buy	Sell	Net
FII/FPI	17,232	19,335	-2,104
DII	18,044	16,332	1,712



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,084	-0.1%	-8.3%	21.8
Sensex 30	76,887	-0.5%	-9.8%	20.1
Nifty 50	23,996	-0.4%	-8.2%	21.8
India VIX	18	-1.6%	90.8%	
Nifty Bank	55,400	-1.5%	-7.0%	16.3
Nifty Next 50	70,568	-0.3%	1.7%	70.6
Nifty 500	22,766	-0.2%	-4.6%	21.4
Nifty Mid 100	60,419	0.3%	-0.1%	31.1
Nifty Small 250	16,722	0.1%	0.2%	28.2
USD/INR	95	0.0%	5.2%	
India 10Y	7.0%			
India 2Y	6.1%			
India 1Y	5.6%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,139	-0.5%	4.3%	30.9
Dow Jones	49,142	-0.1%	2.2%	23.7
Nasdaq 100	27,029	-1.0%	7.1%	44.4
FTSE 100	10,333	0.1%	4.0%	16.3
CAC 40	8,104	-0.5%	-0.6%	23.8
DAX	24,018	-0.3%	-1.9%	25.0
Nikkei 225	59,917	-1.0%	19.0%	32.0
Hang Seng	25,680	-1.0%	0.2%	12.5
Shanghai Cor	4,079	-0.2%	2.8%	18.5
KOSPI	6,624	-0.3%	57.0%	32.8
S&P/ASX 200	8,674	-0.4%	-0.5%	22.9

Stocks in the News

AXIS BANK LTD. (CMP: 1289, MARKET CAP: 400818 Cr., SECTOR: BANK - PRIVATE)

The private lender reported a consolidated net profit of ₹7,129 crore for Q4FY26 on April 29, 2026, marking a significant YoY turnaround. Net Interest Income (NII) grew 11.5% YoY to ₹13,089 crore, while NIMs remained resilient at 4.06%. Asset quality improved with Gross NPA at 1.43% and Net NPA at 0.31%. The board recommended a dividend of ₹1 per equity share. **Axis Bank**

[Economic Times](#)

BAJAJ FINANCE LTD. (CMP: 923, MARKET CAP: 574905 Cr., SECTOR: FINANCE - NBFC)

Reporting on April 29, 2026, the company posted a 21% YoY increase in consolidated net profit to ₹3,825 crore for the fourth quarter. Customer franchise stood at 83.64 million, with new loans booked increasing by 4% to 7.87 million. Assets Under Management (AUM) grew 34% YoY to ₹3,30,615 crore. The board has recommended a dividend of ₹36 per share. **Bajaj Finance**

[Business Standard](#)

LTIMINDTREE LTD. (CMP: 425, MARKET CAP: 14748 Cr., SECTOR: CONSUMER FOOD)

The IT major reported a 1.2% YoY decline in net profit to ₹1,100 crore for Q4FY26 on April 29, 2026. Revenue from operations saw a marginal uptick of 2.3% YoY to ₹8,892 crore. The company faced headwinds in the banking and financial services vertical, though order inflows remained steady at \$1.3 billion. Management indicated a cautious outlook for H1FY27 regarding discretionary spending. **LTIMindtree**

[Moneycontrol](#)

HINDUSTAN UNILEVER LTD. (CMP: 111, MARKET CAP: 115 Cr., SECTOR: ENGINEERING - INDUSTRIAL EQUIPMENTS)

HUL reported a 6% YoY decline in standalone net profit to ₹2,406 crore for the quarter ended March 2026 on April 29. Revenue from operations remained flat at ₹14,693 crore. Underlying volume growth stood at 2%, reflecting a slow recovery in rural markets and price cuts in the skin cleansing category. The board proposed a final dividend of ₹24 per share. **HUL**

[Livemint](#)

Sectoral Inde	CMP	1D	YTD	P/E x
Nifty Auto	25,790	-1.0%	-8.5%	21.2
Nifty IT	28,960	-0.7%	-23.6%	22.6
Nifty Fin Ser	25,938	-0.9%	-6.1%	16.9
Nifty Pharma	23,158	-0.1%	1.9%	38.1
Nifty Services	30,398	-0.8%	-9.7%	33.4
Nifty Cons Du	38,021	0.0%	3.4%	51.5
Nifty PSE	10,766	0.7%	9.3%	11.3
Nifty FMCG	50,883	-0.3%	-8.3%	35.0
Nifty Pvt Bank	26,399	-1.2%	-8.1%	9.9
Nifty PSU Banl	8,663	-2.2%	1.5%	14.2
Nifty Cons	11,404	-0.4%	-7.2%	40.3
Nifty Realty	794	-0.4%	-9.6%	34.5
Nifty Infra	9,419	0.4%	-2.1%	21.9
Nifty Energy	40,991	1.2%	16.0%	13.0
Nifty Health	14,904	-0.1%	1.8%	35.7
Nifty India Mfg	15,601	-0.2%	1.2%	29.1
Nifty Metal	13,046	0.5%	16.8%	23.4
Nifty Oil & Gas	11,687	1.6%	-4.5%	17.9

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
FORCEMOT	197.5	1.8
VMM	146.1	2.6
ADANIPOWER	100.9	1.8
MOTILALOFS	20.2	0.7
PRESTIGE	10.1	0.6
Short		
GODFRYPHLP	251.0	-0.3
NAM-INDIA	87.5	-4.3
COCHINSHIP	65.7	-2.1
HYUNDAI	55.5	-0.5
PGEL	14.9	-5.8
Long Unwinding		
BPCL	-8.4	-1.1
UNIONBANK	-6.8	-0.8
ADANIPORTS	-3.6	-0.6
SUPREMEIND	-2.7	-0.8
HINDPETRO	-2.5	-3.2
Short Unwinding		
COFORGE	-5.6	5.0
JSWENERGY	-3.6	2.3
PNB	-3.5	0.4
SBIN	-3.3	0.1

MACROTECH DEVELOPERS LTD. (CMP: 1140, MARKET CAP: 1140 Cr., SECTOR: ENGINEERING - INDUSTRIAL EQUIPMENTS)

The company reported an 11% YoY decline in net profit to ₹665.5 crore for Q4FY26 on April 29, 2026. However, pre-sales hit a record high of ₹4,230 crore in the quarter, supported by strong demand in the premium segment. Revenue grew by 23.4% YoY to ₹4,018.5 crore. The firm reduced its net debt to ₹3,012 crore, strengthening its balance sheet for land acquisitions. **Lodha** [Financial Express](#)

Commodity:	CMP	1D	YTD
Gold (\$)	4,599	-0.2%	0.3%
Silver (\$)	73.2	0.0%	0.1%
Brent Oil (\$)	111.6	0.3%	-0.2%
WTI Oil (\$)	100.2	0.2%	-20.6%

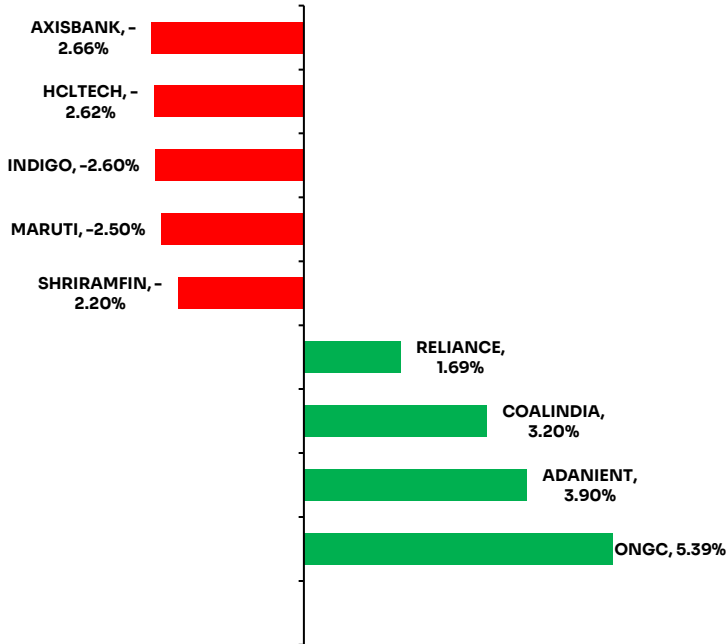
Currency	CMP	1D	YTD
USD/INR	94.5	0.0%	0.0%
EUR/INR	110.7	0.0%	0.1%
GBP/INR	127.8	0.0%	0.1%
JPY/INR	0.6	0.0%	0.1%
EUR/USD	1.2	0.0%	0.1%

Securities Lending & Borrowing Scheme (SLBS)

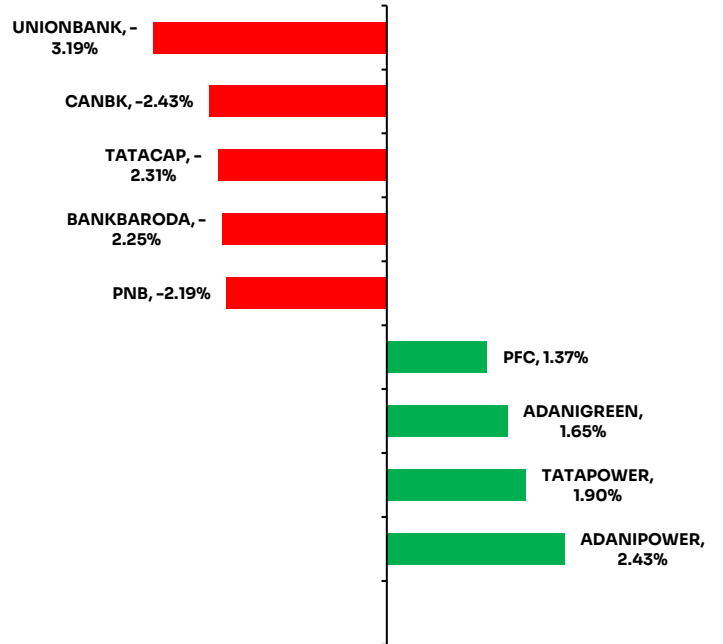
Company	Under.Ltp	Fut.Ltp	Spread (%)
BAJAJHLDNG	10,297.50	10,112.50	1.8
NESTLEIND	1,441.60	1,429.10	0.87
DALBHARAT	1,936.00	1,920.00	0.83
RECLTD	373.75	370.9	0.76
LUPIN	2,303.00	2,285.90	0.74

Top Gainers and Losers

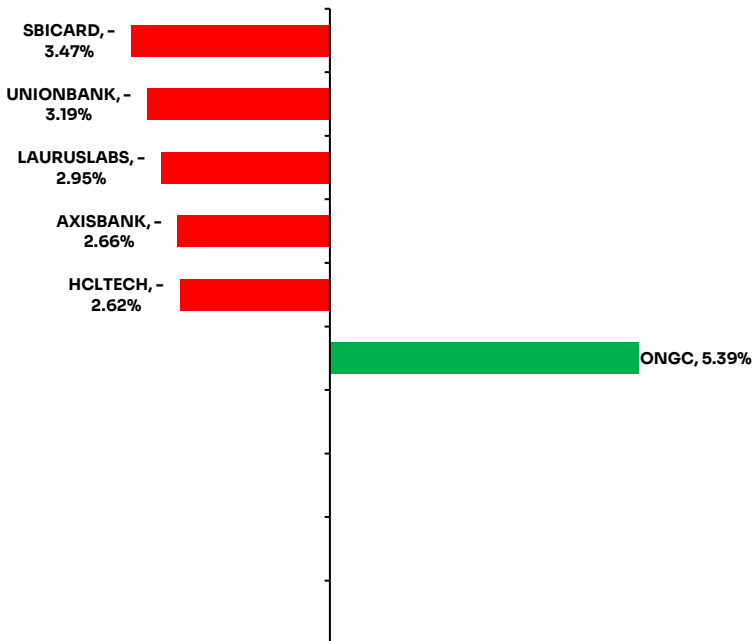
Nifty 50 index



Nifty Next 50 index



Nifty 200 index



52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
ADANIPOWER	224	225	225	28-Apr-26
ADANIENSOL	1,448	1,464	1,425	24-Apr-26
BSE	3,630	3,640	3,640	28-Apr-26
BHEL	356	356	341	23-Apr-26
BHEL	356	356	341	23-Apr-26

52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
INFY	1,151	1,150	1,150	18-Jan-26

Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
KRYSTAL	2,913	592	341	590
SHREEPUSHK	8,312	1,708	969	385
GUJTHEM	9,657	1,993	1,149	357
KOHINOOR	925	199	127	28
BANKNIFTY1	31,133	6,790	4,176	58
SBCL	5,745	1,284	861	593
ATULAUTO	9,400	2,121	2,797	495
IT	34,039	7,855	4,591	31
BLUESTONE	7,484	1,756	1,138	546
IKS	3,915	936	630	1,431
KANCHI	15	4	4	409
HSCL	77,259	19,284	12,082	564
VIDYAWIRES	60,030	15,256	11,463	84
REGENCERAM	15	4	3	43
BHAGERIA	174	47	39	175
MASKINVEST	142	39	20	181
AHCL	9,472	2,603	1,715	16
WILLAMAGOR	40	11	13	25
MOMNC	84	24	16	32
UTIAMC	2,105	593	486	950
PVTBANKADD	2,027	578	480	28
CYIENT	2,049	586	686	870
HINDCOMPOS	87	25	59	482
ESILVER	280	82	100	238
ATUL	318	98	62	6,650

Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
AGI	Irage Broking Services Llp	SELL	299	642.7
AGI	Irage Broking Services Llp	BUY	372	647.4
AGI	Junomoneta Finsol Private Limited	SELL	346	643.5
AGI	Junomoneta Finsol Private Limited	BUY	349	643.1
AGI	Microcurves Trading Private Limited	BUY	536	647.4
AGI	Nk Securities Research Private Limited	SELL	904	645.9
AGI	Nk Securities Research Private Limited	BUY	904	645.5
AGI	Qe Securities Llp	BUY	629	651.5
AGI	Qe Securities Llp	SELL	638	640.2
ARIS	Irage Broking Services Llp	BUY	184	125.4
ARIS	Irage Broking Services Llp	SELL	584	124.8
ARIS	Mansi Share And Stock Broking Private Limited	BUY	0	126.7
ARIS	Mansi Share And Stock Broking Private Limited	SELL	742	124.9
ARIS	Mc Jain Infoservices Private Limited	BUY	600	122.7
ARIS	Swetaben Hardik Shah	SELL	606	124.7
ASIANILES	Ashapura Commodities	SELL	2082	71.1
ASIANILES	Ashapura Commodities	BUY	2082	70.9
AUTOIND	Sanjay Agarwal	SELL	365	62.3
BIKEWO	Ajay Pratyush Nedunuri	BUY	138	22.1
BIKEWO	Premlatha Agarwal	SELL	120	21.5
BIOPOL	Ankit Kumar Jain	SELL	2	101.5
BIOPOL	Ankit Kumar Jain	BUY	56	103.4
C2C	Shishir Radhakumar Tejpal	BUY	0	486.0
C2C	Shishir Radhakumar Tejpal	SELL	86	462.3
EPACK	Blitzquant Research Llp	SELL	1049	293.3
EPACK	Blitzquant Research Llp	BUY	1049	293.1
EPACK	Dipan Mehta Commodities Private Limited	SELL	730	295.9
EPACK	Dipan Mehta Commodities Private Limited	BUY	742	295.7
EPACK	Elixir Wealth Management Private Limited	BUY	1156	295.4
EPACK	Elixir Wealth Management Private Limited	SELL	1157	295.9
EPACK	Hrti Private Limited	SELL	978	294.2
EPACK	Hrti Private Limited	BUY	991	294.9
EPACK	Irage Broking Services Llp	BUY	1253	294.0
EPACK	Irage Broking Services Llp	SELL	1362	293.5
EPACK	Jump Trading Financial India Private Limited	BUY	564	293.8
EPACK	Jump Trading Financial India Private Limited	SELL	564	294.8
EPACK	Junomoneta Finsol Private Limited	BUY	1117	294.0
EPACK	Junomoneta Finsol Private Limited	SELL	1119	294.1
EPACK	Microcurves Trading Private Limited	SELL	1994	294.8
EPACK	Microcurves Trading Private Limited	BUY	1994	294.7
EPACK	Musigma Securities	SELL	641	295.1
EPACK	Musigma Securities	BUY	641	295.0
EPACK	Nk Securities Research Private Limited	SELL	2687	294.3
EPACK	Nk Securities Research Private Limited	BUY	2687	294.2

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
EPACK	Pace Commodity Brokers Private Limited	SELL	513	294.3
EPACK	Pace Commodity Brokers Private Limited	BUY	513	294.1
EPACK	Puma Securities	BUY	863	294.9
EPACK	Puma Securities	SELL	863	294.9
EPACK	Qe Securities Llp	BUY	1930	294.6
EPACK	Qe Securities Llp	SELL	1984	294.5
FABTECH	Arihant Capital Markets Limited	BUY	398	177.9
FABTECH	Arihant Capital Markets Limited	SELL	398	178.4
FABTECH	Nk Securities Research Private Limited	SELL	298	176.7
FABTECH	Nk Securities Research Private Limited	BUY	298	176.6
GICL	Aum Securities Pvt. Ltd.	SELL	557	42.1
GICL	Aum Securities Pvt. Ltd.	BUY	593	42.1
GICL	Vistaar Trading Service Private Limited	BUY	929	42.0
GICL	Vistaar Trading Service Private Limited	SELL	929	42.0
GREENPOWER	Ankita Vishal Shah	SELL	8596	13.4
GREENPOWER	Ankita Vishal Shah	BUY	9496	13.4
GREENPOWER	D3 Stock Vision Llp	BUY	6029	13.4
GREENPOWER	D3 Stock Vision Llp	SELL	6721	13.4
GREENPOWER	Neo Apex Share Broking Services Llp	SELL	7556	13.5
GREENPOWER	Neo Apex Share Broking Services Llp	BUY	7556	13.5
GREENPOWER	Yuga Stocks And Commodities Private Limited	SELL	12379	13.2
GREENPOWER	Yuga Stocks And Commodities Private Limited	BUY	12416	13.4
IRMENERGY	Blitzquant Research Llp	SELL	939	341.2
IRMENERGY	Blitzquant Research Llp	BUY	939	341.0
IRMENERGY	Clt Research Tech Private Ltd	BUY	283	337.4
IRMENERGY	Clt Research Tech Private Ltd	SELL	283	337.6
IRMENERGY	Dipan Mehta Commodities Private Limited	SELL	496	339.2
IRMENERGY	Dipan Mehta Commodities Private Limited	BUY	498	338.8
IRMENERGY	Elixir Wealth Management Private Limited	BUY	247	336.0
IRMENERGY	Elixir Wealth Management Private Limited	SELL	247	336.4
IRMENERGY	Grt Strategic Ventures Llp	SELL	483	339.0
IRMENERGY	Grt Strategic Ventures Llp	BUY	483	338.9
IRMENERGY	Hrti Private Limited	SELL	1235	339.3
IRMENERGY	Hrti Private Limited	BUY	1252	338.2
IRMENERGY	Irage Broking Services Llp	BUY	1201	340.7
IRMENERGY	Irage Broking Services Llp	SELL	1439	340.7
IRMENERGY	J4S Financial Solutions Llp	BUY	221	344.1
IRMENERGY	J4S Financial Solutions Llp	SELL	221	344.3
IRMENERGY	Jump Trading Financial India Private Limited	BUY	392	337.9
IRMENERGY	Jump Trading Financial India Private Limited	SELL	392	338.9
IRMENERGY	Junomoneta Finsol Private Limited	SELL	737	338.7
IRMENERGY	Junomoneta Finsol Private Limited	BUY	737	338.4
IRMENERGY	Kivi Capital	SELL	277	340.3
IRMENERGY	Kivi Capital	BUY	277	340.8
IRMENERGY	Marwadi Shares And Finance Ltd.	BUY	208	342.4
IRMENERGY	Marwadi Shares And Finance Ltd.	SELL	246	335.7
IRMENERGY	Matalia Stock Broking Private Limited	BUY	268	340.0

IRMENERGY	Matalia Stock Broking Private Limited	SELL	268	340.3
IRMENERGY	Mayur Mukeshbhai Dobariya	BUY	230	341.4
IRMENERGY	Mayur Mukeshbhai Dobariya	SELL	230	341.2
IRMENERGY	Microcurves Trading Private Limited	BUY	2069	338.8
IRMENERGY	Microcurves Trading Private Limited	SELL	2069	339.0
IRMENERGY	Musigma Securities	SELL	1133	340.4
IRMENERGY	Musigma Securities	BUY	1133	340.2
IRMENERGY	Nk Securities Research Private Limited	SELL	2409	340.6
IRMENERGY	Nk Securities Research Private Limited	BUY	2409	340.4
IRMENERGY	Pace Commodity Brokers Private Limited	SELL	361	340.6
IRMENERGY	Pace Commodity Brokers Private Limited	BUY	361	340.4
IRMENERGY	Patronus Tradetech Llp	BUY	186	342.2
IRMENERGY	Patronus Tradetech Llp	SELL	220	341.8
IRMENERGY	Plutus Research Private Limited	BUY	218	340.7
IRMENERGY	Plutus Research Private Limited	SELL	218	340.9
IRMENERGY	Puma Securities	SELL	625	338.4
IRMENERGY	Puma Securities	BUY	625	338.3
IRMENERGY	Qe Securities Llp	BUY	2422	339.4
IRMENERGY	Qe Securities Llp	SELL	2429	339.7
IRMENERGY	Rajesh Chamanlal Sanghavi	BUY	288	337.3
IRMENERGY	Rajesh Chamanlal Sanghavi	SELL	293	337.3
IRMENERGY	Shree Naman Securities & Finance Private Limited	SELL	208	339.4
IRMENERGY	Shree Naman Securities & Finance Private Limited	BUY	208	338.9
IRMENERGY	Silverleaf Capital Services Private Limited	SELL	246	341.0
IRMENERGY	Silverleaf Capital Services Private Limited	BUY	246	340.9
IRMENERGY	Vinsul Makardi Ltd	BUY	213	343.7
IRMENERGY	Vinsul Makardi Ltd	SELL	213	343.9
JALAN	Dharmishtha Abhaybhai Shah	SELL	93	1.9
MOBIKWIK	Hrti Private Limited	BUY	508	234.3
MOBIKWIK	Hrti Private Limited	SELL	639	235.0
MOBIKWIK	Irage Broking Services Llp	BUY	401	233.1
MOBIKWIK	Irage Broking Services Llp	SELL	667	230.3
MOBIKWIK	Junomoneta Finsol Private Limited	BUY	715	234.5
MOBIKWIK	Junomoneta Finsol Private Limited	SELL	839	234.2
MOBIKWIK	Microcurves Trading Private Limited	BUY	655	236.0
MOBIKWIK	Microcurves Trading Private Limited	SELL	655	236.0
MOBIKWIK	Nk Securities Research Private Limited	BUY	830	235.2
MOBIKWIK	Nk Securities Research Private Limited	SELL	830	235.3
MOBIKWIK	Qe Securities Llp	BUY	854	234.1
MOBIKWIK	Qe Securities Llp	SELL	911	235.1
PVP	Achintya Securities Limited	BUY	1444	33.4
PVP	Achintya Securities Limited	SELL	1569	33.6
PVP	Crony Vyapar Pvt Ltd	BUY	2503	33.5
PVP	Crony Vyapar Pvt Ltd	SELL	3292	33.5
RICHA	Dharmishthaben Akshay Parekh	BUY	85	63.0
RICHA	Thakor Nayana Chandubhai	SELL	150	63.0
SAIFL	Satya Murthy Sivalenka	SELL	728	8.6
SAIFL	Umang Kamlesh Vora	BUY	312	8.6
SEPC	Yuga Stocks And Commodities Private Limited	SELL	13503	8.8
SEPC	Yuga Stocks And Commodities Private Limited	BUY	15803	8.8

Block Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
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Insider Trading

Company Name	Person Name	Person Category	Buy / Sell	Shareholding prior	Shareholding post	Trade Price
360ONE	Chitra Mohan	Immediate relative	Buy	0.00	0.01	NA
360ONE	Chitra Mohan	Immediate relative	Buy	0.01	0.02	NA
360ONE	Radhakrishnan Mohan	Employees/Designated	Sell	0.01	0.01	NA
360ONE	Radhakrishnan Mohan	Employees/Designated	Sell	0.01	0.00	NA
360ONE	Anshuman Maheshwary	Employees/Designated	Sell	0.04	0.03	1,042.3
360ONE	Anshuman Maheshwary	Employees/Designated	Sell	0.04	0.04	1,041.5
ZENSARTECH	Vijayasimha Alilughatta	Employees/Designated	Sell	0.01	0.01	550.0
ASMS	Kinex India Private Limit	Promoters	Sell	67.50	65.82	7.0

Event Calendar – Corporate Action (Financial Results/ Dividend/other business matters)

Company	Purpose
Accelya Solutions India Limited	Financial Results
Adani Power Limited	Financial Results
Ador Welding Limited	Financial Results/Dividend/Other business matters
Aeroflex Enterprises Limited	Other business matters
Bajaj Finance Limited	Fund Raising
Bajaj Finance Limited	Financial Results/Divide
Bansal Wire Industries Limited	Financial Results
California Software Company Limited	Financial Results/Other
Capital Small Finance Bank Limited	Financial Results
Capital Small Finance Bank Limited	Financial Results/Divide
Cemindia Projects Limited	Financial Results/Divide
The Federal Bank Limited	Financial Results/Divide
Fino Payments Bank Limited	Financial Results
FORCE MOTORS LTD	Financial Results/Divide
Geojit Financial Services Limited	Financial Results/Divide
Granules India Limited	Financial Results/Divide
HEG Limited	Financial Results/Divide
Indiabulls Limited	Financial Results
IIFL Finance Limited	Financial Results/Fund F
Indegene Limited	Financial Results/Divide
Indian Bank	Financial Results/Divide
Indus Infra Trust	Financial Results/Other
Indian Overseas Bank	Financial Results
Jana Small Finance Bank Limited	Financial Results
Kfin Technologies Limited	Financial Results
Lloyds Metals And Energy Limited	Fund Raising
MAS Financial Services Limited	Financial Results/Divide
Mindspace Business Parks REIT	Financial Results/Other
MOIL Limited	Financial Results/Divide
Moksh Ornaments Limited	Other business matters
Motilal Oswal Financial Services Limited	Financial Results/Other
MphasiS Limited	Financial Results/Divide
Mangalam Worldwide Limited	Dividend
Mangalam Worldwide Limited	Financial Results
Navin Fluorine International Limited	Financial Results/Divide
New Delhi Television Limited	Financial Results
Panache Digilife Limited	Financial Results
Ravindra Energy Limited	Financial Results
RPG Life Sciences Limited	Financial Results/Dividend
Sadhana Nitrochem Limited	Fund Raising/Other business matters

Company	Purpose
Shree Digvijay Cement Co.Ltd	Financial Results/Divide
Sterlite Technologies Limited	Financial Results/Dividend/Fund Raising
Summit Securities Limited	Financial Results
Surana Solar Limited	Financial Results
Syngene International Limited	Financial Results/Dividend
Systematix Corporate Services Limil	Financial Results/Dividend
Vakrangee Limited	Financial Results
Vedanta Limited	Financial Results
Waaree Energies Limited	Dividend
Waaree Energies Limited	Fund Raising
Waaree Energies Limited	Financial Results

Nifty & Bank Spot – Pivot Levels 29/04/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23995	23907	23820	23683	24131	24268	24355
Bank Nifty	55400	55062	54725	54187	55937	56475	56812

Vishnu Prakash R Punglia Ltd – Technical Stock Call – 29/04/2026

Technical Stock Call	Action	Reco	Target	Support	SL
VPRPL Ltd	BUY	47.62	85	(43-38-33)	29



View- Short Term Bullish

The stock commenced its downtrend from 80.62 (DEC 25). Forming Lower Tops, the stock traded below the averages indicating selling pressure from higher levels & extended the decline to a low of 29.46 (MAR 26). During the correction phase, the stock entered into a **Descending channel pattern** trading between the range 53.20 – 29.46 (FEB 26_MAR 26). Thereafter, the stock attracted buying interest & commenced its up move further rallied to mark a high of 44.80 (APR 26), but could not surpass its previous high & later, a minor correction followed.

Recently in April 2026, after forming higher bottoms at 38.69, the stock has given a **Symmetrical Triangle Breakout** supported by volume reaching to a high of 49.12, which is higher than the previous swing highs. **The Bullish breakout candle confirms a trend reversal and strength in the current up move. MACD, Williams %R & Aroon indicators suggest Positive momentum.**

Target of **85** is expected with lower support levels at **(43-38-33)** in case of intermediate fall. A stop loss at **29** is to be followed for the trade.

All the calls/opinions are subject to Disclosures and Disclaimer <http://goo.gl/8bCMYQ>

Oil India Ltd – Technical Stock Call – 29/04/2026

Technical Stock Call	Action	Reco	Target	Support	SL
Oil India Ltd	BUY	497.60	600	(486-478)-472-(466-458)	446



View- Short Term Bullish

The primary move in the stock commenced from 399.75 (DEC 25). Stock started trading above the averages & forming Up Gaps gradually reached a high of 520 (JAN 26).

Double Tops were formed, profit booking followed & the stock made a low of 446 (FEB 26).

Buying emerged & the stock commenced its up move again forming Up Gaps, further rallied to mark a high of 506.25 (MAR 26), but faced resistance in that area & traded into a narrow range on the averages seeking trend direction between 506.25 – 463.05 (MAR 26_ APR 26).

Recently in April 2026, after forming higher bottoms & taking support on trendline, the stock has given a **Symmetrical Triangle Breakout** with a Bullish candle supported by volume reaching to a high of 501, which confirms the breakout & identifies the strength in the current uptrend.

MACD, RSI trading above 50 & Aroon indicators suggest Positive momentum.

Target of **600** is expected with lower support levels at **(486-478)-472-(466-458)** in case of intermediate fall. A stop loss at **446** is to be followed for the trade.

All the calls/opinions are subject to Disclosures and Disclaimer <http://goo.gl/8bCMYQ>

Global Macro Events (21 st April 2026)		
Event	Previous	Forecasted
India		
Foreign Exchange Reserves APR/17	\$700.95B	
USA		
API Crude Oil Stock Change APR/24	-1.79M	
MBA 30-Year Mortgage Rate APR/24		
MBA Mortgage Applications APR/24		
MBA Mortgage Market Index APR/24		
MBA Mortgage Refinance Index APR/24		
MBA Purchase Index APR/24		
Building Permits Prel MAR		1.35M
Building Permits Prel FEB		1.36M
Durable Goods Orders MoM MAR		0.008
Housing Starts FEB		1.41M
Housing Starts MAR		1.4M
Building Permits MoM Prel MAR		-0.007
Building Permits MoM Prel FEB		-0.019
Durable Goods Orders Ex Transp MoM MAR		0.006
Goods Trade Balance Adv MAR		\$-85.0B
Housing Starts MoM FEB		-0.052
Housing Starts MoM MAR		-0.007
Retail Inventories Ex Autos MoM Adv MAR		-0.002
Wholesale Inventories MoM Adv MAR		0.003
Durable Goods Orders ex Defense MoM MAR		0.007
Non Defense Goods Orders Ex Air MAR		0.005
EIA Crude Oil Stocks Change APR/24		
EIA Gasoline Stocks Change APR/24		
EIA Crude Oil Imports Change APR/24		
EIA Cushing Crude Oil Stocks Change APR/24		
EIA Distillate Fuel Production Change APR/24		
EIA Distillate Stocks Change APR/24		
EIA Gasoline Production Change APR/24		
EIA Heating Oil Stocks Change APR/24		
EIA Refinery Crude Runs Change APR/24		
17-Week Bill Auction		
Fed Interest Rate Decision		0.0375
China		
National People's Congress Standing Committee		
Great Britain		

Germany

Baden Wuerttemberg CPI MoM APR

Baden Wuerttemberg CPI YoY APR

Bavaria CPI MoM APR

Bavaria CPI YoY APR

Brandenburg CPI MoM APR

Brandenburg CPI YoY APR

Hesse CPI MoM APR

Hesse CPI YoY APR

North Rhine Westphalia CPI MoM APR

North Rhine Westphalia CPI YoY APR

Saxony CPI MoM APR

Saxony CPI YoY APR

10-Year Bund Auction

Inflation Rate YoY Prel APR

0.031

Inflation Rate MoM Prel APR

0.008

Harmonised Inflation Rate MoM Prel APR

0.008

Harmonised Inflation Rate YoY Prel APR

0.031

##STOCK SPECIFIC NEWS

Axis Bank

The private lender reported a consolidated net profit of ₹7,129 crore for Q4FY26 on April 29, 2026, marking a significant YoY turnaround. Net Interest Income (NII) grew 11.5% YoY to ₹13,089 crore, while NIMs remained resilient at 4.06%. Asset quality improved with Gross NPA at 1.43% and Net NPA at 0.31%. The board recommended a dividend of ₹1 per equity share. **Axis Bank** [Economic Times](#)

Bajaj Finance

Reporting on April 29, 2026, the company posted a 21% YoY increase in consolidated net profit to ₹3,825 crore for the fourth quarter. Customer franchise stood at 83.64 million, with new loans booked increasing by 4% to 7.87 million. Assets Under Management (AUM) grew 34% YoY to ₹3,30,615 crore. The board has recommended a dividend of ₹36 per share. **Bajaj Finance** [Business Standard](#)

LTIMindtree

The IT major reported a 1.2% YoY decline in net profit to ₹1,100 crore for Q4FY26 on April 29, 2026. Revenue from operations saw a marginal uptick of 2.3% YoY to ₹8,892 crore. The company faced headwinds in the banking and financial services vertical, though order inflows remained steady at \$1.3 billion. Management indicated a cautious outlook for H1FY27 regarding discretionary spending. **LTIMindtree** [Moneycontrol](#)

Hindustan Unilever (HUL)

HUL reported a 6% YoY decline in standalone net profit to ₹2,406 crore for the quarter ended March 2026 on April 29. Revenue from operations remained flat at ₹14,693 crore. Underlying volume growth stood at 2%, reflecting a slow recovery in rural markets and price cuts in the skin cleansing category. The board proposed a final dividend of ₹24 per share. **HUL** [Livemint](#)

Macrotech Developers (Lodha)

The company reported an 11% YoY decline in net profit to ₹665.5 crore for Q4FY26 on April 29, 2026. However, pre-sales hit a record high of ₹4,230 crore in the quarter, supported by strong demand in the premium segment. Revenue grew by 23.4% YoY to ₹4,018.5 crore. The firm reduced its net debt to ₹3,012 crore, strengthening its balance sheet for land acquisitions. **Lodha** [Financial Express](#)

Oracle Financial Services Software

OFSS reported a 17% YoY increase in consolidated net profit to ₹560 crore for Q4FY26 on April 29. Revenue grew 12% to ₹1,642 crore, driven by strong license wins in the EMEA and APAC regions. The company continues to maintain high operating margins at 44%. Technical positioning shows the stock trading above its 200-day EMA with a bullish bias. **OFSS** [Businessline](#)

Trent

Trent's standalone net profit surged by 531% YoY to ₹311.2 crore for the quarter ended March 2026, reported on April 29. Revenue from operations grew 51% YoY to ₹3,297.7 crore. The exceptional growth was driven by the rapid expansion of Zudio and improved store productivity in Westside. Market analysts view the stock as a prime retail play despite high valuations. **Trent** [Economic Times](#)

Dalmia Bharat

The cement producer reported a 47% YoY decline in net profit to ₹320 crore for Q4FY26 on April 29, citing lower realization and higher competition. Revenue grew 10% YoY to ₹4,307 crore on the back of 18.5% volume growth. EBITDA per ton fell to ₹950. The company remains committed to its capacity expansion plan to reach 75 MTPA by FY27. **Dalmia Bharat** [Business Standard](#)

Indian Hotels Company (IHCL)

IHCL reported a 27% YoY increase in net profit to ₹418 crore for Q4FY26 on April 29, 2026. Revenue rose 17% to ₹1,905 crore, driven by record RevPAR (Revenue Per Available Room) growth across its Taj and Ginger brands. Management indicated that the demand for spiritual tourism and MICE (Meetings, Incentives, Conferences, and Exhibitions) remains at an all-time high. **IHCL** [Moneycontrol](#)

Syngene International

The research organization reported a 6% YoY decline in net profit to ₹189 crore for the quarter ended March 2026 on April 29. Revenue from operations grew 8% to ₹917 crore. The performance was impacted by lower demand in the Discovery Services segment due to the funding crunch in global biotech. Guidance for FY27 remains conservative with high single-digit revenue growth. **Syngene** [Livemint](#)

AU Small Finance Bank

AU SFB reported a net profit of ₹371 crore for Q4FY26 on April 29, down 13% YoY due to higher integration expenses from the Fincare merger. NII grew by 10% YoY. Asset quality remained stable with GNPA at 1.67%. The bank's credit card and digital banking segments showed strong momentum, with the total balance sheet crossing ₹1.2 lakh crore. **AU SFB** [Business Standard](#)

Exide Industries

The stock is in focus on April 29, 2026, following news of its subsidiary signing a multi-year technical collaboration with a global EV cell manufacturer. This partnership aims to accelerate the commercialization of its 6GWh lithium-ion cell factory. Analysts have upgraded the stock target, anticipating a significant shift from lead-acid to lithium-ion revenue mix by FY28. **Exide** [Economic Times](#)

Supreme Industries

Supreme Industries reported a 1% YoY increase in net profit to ₹355 crore for Q4FY26 on April 29. Revenue rose 16% YoY to ₹3,007 crore. Volume growth was robust at 33% in the plastic piping segment, though margins were squeezed by volatile PVC resin prices. The company declared a final dividend of ₹22 per share. **Supreme Ind** [Business Standard](#)

KPIT Technologies

The company reported a 47% YoY surge in net profit to ₹164 crore for Q4FY26 on April 29, 2026. Revenue grew 28% YoY in CC terms, driven by strong demand for SDV (Software Defined Vehicles) architectures from European OEMs. The TCV (Total Contract Value) of new deals won in the quarter stood at \$185 million. **KPIT Tech** [Livemint](#)

Tata Communications

On April 29, 2026, the company reported a net profit of ₹321 crore for Q4FY26, down 1.5% YoY. Revenue from operations grew 17.5% YoY to ₹5,691 crore, led by the Data Services segment. EBITDA margins contracted slightly to 18.6% due to higher costs associated with the integration of recent acquisitions. **Tata Comm** [Moneycontrol](#)

Zydus Lifesciences

Zydus announced on April 29, 2026, that it has received USFDA approval for its New Drug Application (NDA) for a critical orphan drug used in the treatment of rare metabolic disorders. This approval grants seven years of market exclusivity. Market positioning for the stock remains strong as it transitions toward a complex specialty portfolio. **Zydus Life** [Business Standard](#)

Shoppers Stop

The retailer reported a consolidated net profit of ₹23 crore for the quarter ended March 2026 on April 29, compared to a loss in the previous year. Revenue grew 9% YoY to ₹1,017 crore. Average Transaction Value (ATV) increased by 8% as the company focused on premium beauty and high-end apparel categories. **Shoppers Stop** [Financial Express](#)

Poonawalla Fincorp

The NBFC reported a 25% YoY increase in net profit to ₹281 crore for Q4FY26 on April 29, 2026. Disbursements hit an all-time high of ₹9,680 crore, up 52% YoY. Net NPA remained exceptionally low at 0.78%. The company's focus on a "Digital First" approach has resulted in a significant reduction in operating costs to 3.2% of AUM.

Poonawalla [Economic Times](#)

Mastek

The IT solutions provider reported on April 29, 2026, that its Q4 net profit grew 18% YoY to ₹85 crore. Revenue rose 12% YoY, supported by strong execution in the UK public sector and US healthcare markets. The 12-month order backlog stood at ₹2,100 crore, providing visibility for early FY27 growth. **Mastek** [Businessline](#)

Cyient

Cyient reported a 28% YoY increase in net profit to ₹189 crore for Q4FY26 on April 29. Revenue grew 11% YoY, led by the Connectivity and Aerospace segments. The company announced a strategic restructuring of its DLM (Design Led Manufacturing) business to unlock shareholder value. Dividend for the year totaled ₹30 per share.

Cyient [Livemint](#)

##CORPORATE ANNOUNCEMENTS

Axis Bank / Board Meeting for Fundraising

The Board of Directors on April 29, 2026, approved the raising of funds through the issuance of debt securities including NCDs and Green Bonds up to an amount of ₹35,000 crore. This move is aimed at supporting long-term credit growth in infrastructure and renewable energy sectors. [Official Filing](#)

Hindustan Unilever / Final Dividend Declaration

The company officially notified the exchanges on April 29, 2026, that its board has recommended a final dividend of ₹24 per share for FY26. The record date for the payout has been set for June 14, 2026, pending approval at the upcoming AGM. [Official Filing](#)

Trent / Increase in Authorised Capital

Trent Limited disclosed on April 29, 2026, that its board has approved an increase in the authorized share capital to ₹200 crore to facilitate potential future equity expansions and strategic acquisitions. [Official Filing](#)

Indian Hotels Company / New Hotel Signing

IHCL announced the signing of a new 150-key Vivanta hotel in Lucknow on April 29, 2026. This project is part of the company's "Ahvaan 2025" strategy to strengthen its footprint in key state capitals through an asset-light model. [Official Filing](#)

Dalmia Bharat / Scheme of Amalgamation

On April 29, 2026, the company filed a disclosure regarding the NCLT approval for the merger of its step-down subsidiaries into the parent entity. This restructuring is intended to simplify the corporate structure and improve operational efficiencies. [Official Filing](#)

MACRO / NON-STOCK NEWS

US Federal Reserve / Interest Rate Decision

The FOMC, at its meeting concluded late on April 28, 2026, voted to maintain the federal funds rate at 5.25%–5.50%. Chairman Jerome Powell highlighted that while inflation has eased, "further evidence" is required before commencing rate cuts. This hawkish pause has led to a spike in the US 10-year Treasury yield to 4.68% on April 29. Bloomberg | [Federal Reserve](#)

India Core Sector / March Output Data

The Ministry of Commerce released data on April 29, 2026, showing that India's eight core industries grew by 5.8% YoY in March 2026. Cement and Coal led the pack with 10.2% and 8.5% growth respectively. This robust performance suggests a positive trend for the overall IIP numbers due next month. Economic Times | [PIB](#)

Nifty 50 / Derivatives Positioning

Ahead of the April monthly expiry on April 30, Nifty is witnessing heavy call writing at the 22,600 and 22,700 strikes as of April 29. The Put-Call Ratio (PCR) has dipped to 0.88, indicating a cautious sentiment. Analysts expect high volatility with a support floor at 22,350. Bloomberg | [NSE India](#)

USDINR / Rupee Under Pressure

The Indian Rupee hit a fresh record low of 84.15 against the US Dollar in early trade on April 29, 2026. The pressure stems from a stronger DXY and persistent FPI outflows from the equity market. The RBI is expected to intervene via state-run banks to prevent a sharp slide beyond the 84.25 level. Economic Times | [RBI](#)

Corporate Bond Market / Yield Trends

Yields on 10-year AAA-rated corporate bonds in India rose by 5 bps to 7.62% on April 29, tracking the global hardening of sovereign yields. Spreads over the benchmark G-Sec remain narrow at 45 bps, indicating continued liquidity in the domestic credit markets despite global jitters. Bloomberg | [CCIL](#)

Global Oil Prices / Brent Outlook

Brent crude futures rose to \$89.40/bbl on April 29, 2026, following a larger-than-expected drawdown in US inventories. Markets are also factoring in a potential extension of OPEC+ production cuts through Q3 2026. High energy costs remain a key upside risk to India's CPI forecast for the monsoon season. Reuters | [OilPrice](#)

FPI Activity / Monthly Net Sell

Provisional data for April 29 shows that FPIs have been net sellers to the tune of ₹32,000 crore in the cash segment for the month of April so far. Conversely, DIIs have remained net buyers of ₹28,500 crore, providing a cushion to the frontline indices. Business Standard | [NSDL](#)

India Forex Reserves / Weekly Update

RBI data preview for the week ended April 24 indicates a potential \$2 billion dip in forex reserves due to valuation losses and currency intervention. Reserves are expected to hover around \$641 billion. This remains a robust buffer covering nearly 11 months of projected imports. Economic Times | [RBI](#)

GST Collections / April Preview

Revenue department sources on April 29 suggest that GST collections for the month of April 2026 (collected in May) are likely to hit an all-time high of ₹1.95 lakh crore. The surge is attributed to year-end compliance and robust economic activity in the manufacturing sector. Economic Times | [Financial Express](#)

US Dollar Index (DXY) / Technical Strength

The DXY surged to 106.8 on April 29, 2026, following the Fed's hawkish tone. This has led to a broad-based sell-off in emerging market currencies and commodities. Technical analysts see the next major resistance for DXY at the 107.5 level. Bloomberg | [Investing.com](#)

India Manufacturing PMI / Early Estimates

Flash estimates for the April manufacturing PMI, released late on April 28, show a reading of 58.6, up from 58.1 in March. This indicates a sustained expansion in new orders and output, providing a strong macro tailwind for the capital goods and industrial sectors. Economic Times | [S&P Global](#)

Real Estate / Luxury Housing Sales

A Knight Frank report published on April 29, 2026, highlights that sales of luxury homes (above ₹10 crore) in India grew by 42% YoY in Q1 2026. Mumbai and Gurugram contributed 65% of these sales. This structural shift toward premiumization is a key driver for RERA-compliant Tier-1 developers. Business Standard | [Knight Frank](#)

India Services PMI / Expansion Mode

Early April data suggests the Services PMI will likely print at 60.4, driven by a rebound in travel and financial services. High-frequency indicators like airline passenger traffic and digital payments continue to trend at record highs. Economic Times | [Mint](#)

Monsoon 2026 / IMD Second Stage Forecast

The IMD on April 29 reiterated its "Above Normal" monsoon forecast for 2026, with a 75% probability of La Niña conditions developing by June. This has led to a re-rating of rural-focused stocks in the FMCG and tractor sectors. Business Standard | [IMD](#)

Corporate Earnings / Mid-cap Outperformance

Analysis of earnings reported so far in April 2026 shows that mid-cap companies are outperforming large-caps in terms of EBITDA margin expansion. This has led to the Nifty Midcap 100 index trading at an all-time high P/E of 26.5x. Moneycontrol | [BSE India](#)

Silver Prices / Industrial Demand

Silver futures on the MCX crossed ₹84,500/kg on April 29, 2026, driven by massive demand from the solar panel manufacturing industry in India. Analysts suggest silver is behaving more as an industrial metal than a precious metal in the current cycle. Bloomberg | [Investing.com](#)

Global Semiconductor Sales / Recovery Signs

The Semiconductor Industry Association reported on April 29 that global sales rose 15% YoY in March 2026. This recovery is a positive signal for Indian EMS (Electronic Manufacturing Services) players who are scaling up assembly operations under the PLI scheme. Bloomberg | [SIA](#)

India SME Market / Listing Trends

The SME platform on the NSE saw three new listings on April 29, 2026, with average listing gains of 45%. SEBI is reportedly monitoring the high volatility and valuation multiples in this segment to protect retail investors. NSE | [NSE India](#)

US Labor Market / JOLTS Data

The US JOLTS report released on April 29 showed job openings falling to 8.4 million, the lowest in three years. While this signals a cooling labor market, it was not enough to shift the Fed's stance toward an immediate rate cut. Reuters | [BLS](#)

Direct Tax Collections / Record Surplus

The Ministry of Finance announced on April 29 that direct tax collections for FY26 exceeded the budget estimate by ₹1.4 lakh crore. This fiscal cushion allows the government to maintain its capex-heavy agenda without increasing the market borrowing program. PIB | [Economic Times](#)

Eurozone Inflation / April Print

Eurozone inflation data for April 2026 came in at 2.4% YoY, matching estimates. This increases the likelihood of an ECB rate cut in June, which could lead to euro weakness and further dollar strength, impacting Indian IT exporters' margins. Bloomberg | [Eurostat](#)

FDI Inflows / Tech Sector Dominance

DPIIT data analyzed on April 29 shows that 40% of India's FDI inflows in Q1 2026 were directed toward the hardware and software sectors. This underscores the global confidence in India's digital public infrastructure. Economic Times | [DPIIT](#)

Copper Prices / LME Breakthrough

Copper prices hit a multi-year high of \$10,150/tonne on the LME on April 29, 2026. This move is driven by supply disruptions in major mines and the increasing metal intensity of global AI infrastructure build-outs. Bloomberg | [LME](#)

India 10-Year G-Sec / Yield Hardening

The benchmark 10-year G-Sec yield rose to 7.22% on April 29, tracking the US Treasury trend. Rising yields are a headwind for the valuation of mid-cap stocks and lead to higher borrowing costs for the corporate sector. Economic Times | [IndiaBonds](#)

Hedge Fund Positioning / EM Rebalancing

Global hedge fund data from April 29 indicates a slight rebalancing away from "expensive" Indian equities toward "deep value" Chinese stocks. This tactical shift is contributing to the high-frequency selling observed in the large-cap Nifty stocks. Bloomberg | [Reuters](#)

Insolvency & Bankruptcy Code / Resolution Trends

The IBBI report on April 29 highlights that the average recovery rate for lenders under the IBC improved to 38% in FY26. This strengthening of the credit culture is a long-term positive for the PSU and private banking valuations. Business Standard | [IBBI](#)

Electricity Generation / Summer Demand

Power ministry data on April 29 shows that India's daily electricity demand hit a new peak of 245 GW due to an early heatwave in North India. This has led to a spike in merchant power prices to ₹10/unit on the IEX. Economic Times | [POSOCO](#)

Global IPO Market / Recovery in Sight

A Goldman Sachs report on April 29 projects a 30% increase in global IPO activity for 2026. This positive global sentiment is expected to support the listing plans of several high-profile Indian unicorns later this year. Bloomberg | [Goldman Sachs](#)

Consumer Confidence / RBI Survey

The RBI's April Consumer Confidence Survey shows the "Current Situation Index" at a multi-year high of 98.5. This improvement in sentiment is expected to translate into higher discretionary spending in the H1FY27 wedding season. RBI | [Financial Express](#)

Nifty Bank / Support Levels

Bank Nifty closed at 48,250 on April 28. For the April 29 session, technical support is seen at 47,800, while the 20-day SMA at 48,650 remains the immediate hurdle. Option data suggests a neutral-to-bearish stance for the upcoming expiry. Bloomberg | [Moneycontrol](#)

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