

28 April 2026



# PRIME END OF THE DAY SUMMARY



## Nifty Dips Nearly 200 Points Amid April Expiry Volatility

Following yesterday's strong recovery, Nifty faced renewed selling at higher levels today, dropping 97 points to close at 23,995. It opened 43 points lower but rebounded swiftly, holding steady till the first two hours. Post-11 a.m., a sharp reversal saw it plunge more than 220 points intraday, settling near the day's low. NSE cash market volumes rose 5% from yesterday. NSE Cash Market volumes were higher by 5% as compared to yesterday.

ONGC, Adani Enterprises, and Coal India led Nifty gainers, while Axis Bank, Maruti, and HCL Tech endured the heaviest selling as top losers.

Barring Nifty Oil & Gas, Metals, and Chemicals, all other sectoral indices ended green. Amongst them, Nifty PSU Banks, Private Banks and Auto posted the steepest declines.

Nifty Midcap 100 and Smallcap 100 bucked the trend, up 0.28% and 0.42% respectively. Market breadth weakened, with the advance-decline ratio at 0.90, hinting at selective profit-booking after weeks of strong gains.

The rupee depreciated 35 paise with Asian peers, closing at a one-month low of 94.54, fueled by rising crude prices, risk-off sentiment, and expected dollar demand from corporate remittances.

**Key resistance emerged near the 50 DEMA at 24,197, which now acts as an immediate hurdle, while support holds firm around 23,800.**

### DOMESTIC INDICES

	CLOSE	POINTS	% CHANGE
SENSEX	76,886.91	-416.72	-0.54
NIFTY	23,995.70	-97.00	-0.40
BSE MIDCAP	16,252.01	-5.75	-0.04
BSE SMALLCAP	6,658.79	-3	-0.05

### BSE SECTORAL INDICES

	CLOSE	POINTS	% CHANGE
OIL & GAS	27839.05	410.72	1.50
METAL	42922.72	208.56	0.49
CAP GOODS	77941.87	333.79	0.43
POWER	8263.57	30.71	0.37
INDUSTRIALS	15970.91	22.47	0.14
CONS DURABLES	59961.76	-134.31	-0.22
HEALTHCARE	44563.26	-114.11	-0.26
REALTY	6130.1	-33.67	-0.55
IT	28036.31	-221	-0.78
FINANCE	12195.7	-120.81	-0.98
AUTO	56972.82	-565.99	-0.98
BANKEX	62360.06	-1023.3	-1.61

### BSE 200 GAINERS/LOSERS

GAINERS	% Change	LOSERS	% Change
ONGC	5.65	THERMAX	-3.89
OIL	4.31	SBICARD	-3.43
ADANIENT	3.91	UNIONBANK	-2.78
COALINDIA	3.27	MARUTI	-2.61
WAAREEENER	3.17	AXISBANK	-2.60



# END OF THE DAY SUMMARY

NIFTY MOST ACTIVE EQUITIES (VALUE)	
STOCK NAME	VALUE (Rs Cr)
RELIANCE	5,663
SUNPHARMA	2,894
VEDL	2,828
HDFCBANK	2,781

NSE 52 WEEK HIGH/LOW	
52-WK HIGH	140
52-WK LOW	23

NSE UPPER/LOWER CIRCUIT	
UPPER CIRCUIT	92
LOWER CIRCUIT	65

NSE ADVANCE/DECLINES	
ADVANCES	1490
DECLINES	1784
UNCHANGED	105
<b>ADV/DEC Ratio</b>	<b>0.84</b>

NIFTY 50 INDEX CONTRIBUTORS		
Pullers	RELIANCE	40.26
	BHARTIARTL	20.60
	ONGC	13.74
	COALINDIA	7.43
	ADANIENIT	5.41

Draggers	ICICIBANK	-39.16
	HDFCBANK	-24.84
	AXISBANK	-22.14
	SBIN	-16.77
	INFY	-14.73

FX & COMMODITIES		
	VALUE	% CHANGE
USD/INR	94.55	0.37
IND10 YR BOND YIELD	6.95	-0.44
GOLD (\$ / OUNCE)	4610.68	-1.52
SILVER (\$ / OUNCE)	73.09	-3.20
CRUDE OIL FUTURES (\$ / BARREL)	111.11	2.66
GOLD (RS. / 10 GRAMS)	150006	-1.13
SILVER (RS. / KG)	236472	-2.21

## NIFTY 50 INDEX HEATMAP

ONGC 302 5.63%	ADANIENIT 2415 4.01%	COALINDIA 467.4 3.29%	RELIANCE 1393 1.99%	NESTLEIND 1441.6 1.71%	BHARTIARTL 1851 1.70%	TECHM 1412.5 1.17%	ETERNAL 258.28 1.09%	TATASTEEL 215.58 1.08%
DRREDDY 1347.4 0.97%	HINDALCO 1072 0.96%	SUNPHARMA 1749 0.89%	ADANIPTS 1639 0.64%	BAJAJFINSV 1779.9 0.43%	BEL 436.65 0.24%	JSWSTEEL 1285 0.18%	ITC 304.25 0.13%	TCS 2450.7 0.13%
TRENT 4266 0.12%	KOTAKBANK 377.25 0.12%	GRASIM 2775.9 -0.08%	BAJFINANCE 920 -0.20%	LT 4040 -0.34%	SBILIFE 1808.6 -0.37%	POWERGRID 319.65 -0.39%	CIPLA 1310.9 -0.48%	TITAN 4420 -0.49%
M&M 3084.8 -0.57%	MAXHEALTH 1003.9 -0.59%	NTPC 407 -0.78%	TMPV 351.2 -0.89%	HDFCBANK 782.35 -0.94%	JIOFIN 251 -1.04%	APOLLOHOSP 7740 -1.09%	TATACONSUM 1147 -1.16%	ASIANPAINT 2456.1 -1.17%
HDFCLIFE 590.2 -1.19%	EICHERMOT 7075 -1.38%	ULTRACEMCO 11822 -1.57%	WIPRO 201.7 -1.63%	HINDUNILVR 2290 -1.64%	INFY 1151 -1.65%	SBIN 1093.4 -1.66%	BAJAJ-AUTO 9483 -1.85%	ICICIBANK 1289.1 -1.90%
INDIGO 4465 -2.11%	SHRIRAMFIN 952.5 -2.27%	HCLTECH 1199.8 -2.31%	MARUTI 12890 -2.51%	AXISBANK 1288.8 -2.67%				



## Disclaimer:

HDFC Securities Limited (HSL) is a SEBI Registered Research Analyst having registration no. INH000002475.

This report has been prepared by HDFC Securities Ltd and is solely for information of the recipient only. The report must not be used as a singular basis of any investment decision. The views herein are of a general nature and do not consider the risk appetite or the particular circumstances of an individual investor; readers are requested to take professional advice before investing. "This report may have been refined using AI tools to enhance clarity and readability."

Nothing in this document should be construed as investment advice. Each recipient of this document should make such investigations as they deem necessary to arrive at an independent evaluation of an investment in securities of the companies referred to in this document (including merits and risks) and should consult their own advisors to determine merits and risks of such investment. The information and opinions contained herein have been compiled or arrived at, based upon information obtained in good faith from sources believed to be reliable. Such information has not been independently verified and no guaranty, representation of warranty, express or implied, is made as to its accuracy, completeness or correctness. All such information and opinions are subject to change without notice. Descriptions of any company or companies or their securities mentioned herein are not intended to be complete. HSL is not obliged to update this report for such changes. HSL has the right to make changes and modifications at any time. This report is not directed to, or intended for display, downloading, printing, reproducing or for distribution to or use by, any person or entity who is a citizen or resident or located in any locality, state, country or other jurisdiction where such distribution, publication, reproduction, availability or use would be contrary to law or regulation or what would subject HSL or its affiliates to any registration or licensing requirement within such jurisdiction.

If this report is inadvertently sent or has reached any person in such country, especially, United States of America, the same should be ignored and brought to the attention of the sender. This document may not be reproduced, distributed or published in whole or in part, directly or indirectly, for any purposes or in any manner.

Foreign currencies denominated securities, wherever mentioned, are subject to exchange rate fluctuations, which could have an adverse effect on their value or price, or the income derived from them. In addition, investors in securities such as ADRs, the values of which are influenced by foreign currencies effectively assume currency risk. It should not be considered to be taken as an offer to sell or a solicitation to buy any security.

This document is not, and should not, be construed as an offer or solicitation of an offer, to buy or sell any securities or other financial instruments. This report should not be construed as an invitation or solicitation to do business with HSL. HSL may from time to time solicit from, or perform broking, or other services for, any company mentioned in this mail and/or its attachments.

HSL and its affiliated company(ies), their directors and employees may; (a) from time to time, have a long or short position in, and buy or sell the securities of the company(ies) mentioned herein or (b) be engaged in any other transaction involving such securities and earn brokerage or other compensation or act as a market maker in the financial instruments of the company(ies) discussed herein or act as an advisor or lender/borrower to such company(ies) or may have any other potential conflict of interests with respect to any recommendation and other related information and opinions.

HSL, its directors, analysts or employees do not take any responsibility, financial or otherwise, of the losses or the damages sustained due to the investments made or any action taken on basis of this report, including but not restricted to, fluctuation in the prices of shares and bonds, changes in the currency rates, diminution in the NAVs, reduction in the dividend or income, etc.



HSL and other group companies, its directors, associates, employees may have various positions in any of the stocks, securities and financial instruments dealt in the report, or may make sell or purchase or other deals in these securities from time to time or may deal in other securities of the companies / organizations described in this report. As regards the associates of HSL please refer the website.

HSL or its associates might have managed or co-managed public offering of securities for the subject company or might have been mandated by the subject company for any other assignment in the past twelve months.

Please note that HDFC Securities has a proprietary trading desk. This desk maintains an arm's length distance with the Research team and all its activities are segregated from Research activities. The proprietary desk operates independently, potentially leading to investment decisions that may deviate from research views.

HSL or its associates might have received any compensation from the companies mentioned in the report during the period preceding twelve months from the date of this report for services in respect of managing or co-managing public offerings, corporate finance, investment banking or merchant banking, brokerage services or other advisory service in a merger or specific transaction in the normal course of business.

HSL or its analysts did not receive any compensation or other benefits from the companies mentioned in the report or third party in connection with preparation of the research report. Accordingly, neither HSL nor Research Analysts have any material conflict of interest at the time of publication of this report. Compensation of our Research Analysts is not based on any specific merchant banking, investment banking or brokerage service transactions. HSL may have issued other reports that are inconsistent with and reach different conclusion from the information presented in this report. Research entity has not been engaged in market making activity for the subject company. Research analyst has not served as an officer, director or employee of the subject company. We have not received any compensation/benefits from the subject company or third party in connection with the Research Report.

HDFC securities Limited, I Think Techno Campus, Building - B, "Alpha", Office Floor 8, Near Kanjurmarg Station, Opp. Crompton Greaves, Kanjurmarg (East), Mumbai 400 042 Phone: (022) 3075 3400 Fax: (022) 2496 5066

Compliance Officer: Murli V Karkera Email: [complianceofficer@hdfcsec.com](mailto:complianceofficer@hdfcsec.com) Phone: (022) 3045 3600

For grievance redressal contact Customer Care Team Email: [customercare@hdfcsec.com](mailto:customercare@hdfcsec.com) Phone: (022) 3901 9400

HDFC Securities Limited, SEBI Reg. No.: NSE, BSE, MSEI, MCX: INZ000186937; AMFI Reg. No. ARN: 13549; PFRDA Reg. No. POP: 11092018; IRDA Corporate Agent License No.: CA0062; SEBI Research Analyst Reg. No.: INH000002475; SEBI Investment Adviser Reg. No.: INA000011538; CIN - U67120MH2000PLC152193

Investment in securities market are subject to market risks. Read all the related documents carefully before investing.

Mutual Funds Investments are subject to market risk. Please read the offer and scheme related documents carefully before investing.

Registration granted by SEBI, membership of BASL (in case of IAs) and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors.