

Market Snapshot

KEY INDICES	13-Mar-26	06-Mar-26	05-Sep-25
S&P CNX NIFTY	23151.10	24450.45	-5.31
SENSEX	74563.92	78918.90	-5.52
NIFTY MIDCAP 100	54761.10	57393.35	-4.59
NIFTY SMLCAP 100	15895.25	16498.90	-3.66

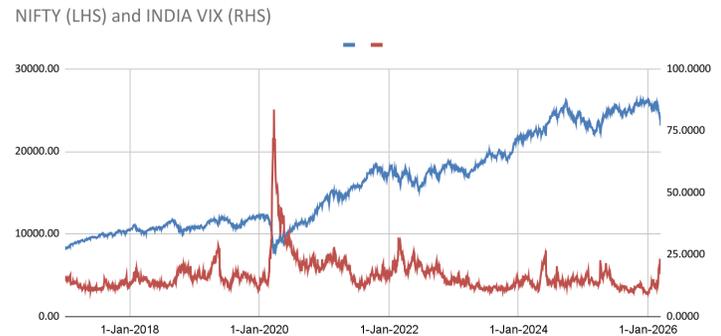
(Source: Capitaline, [Investing.com](https://www.investing.com))

Sectoral Snapshot

KEY INDICES	13-Mar-26	06-Mar-26	%Ch
NIFTY BANK	53757.85	55100.95	-2.44%
NIFTY AUTO	24195.10	25098.00	-3.60%
NIFTY FMCG	47924.15	48189.15	-0.55%
NIFTY IT	29071.25	29579.45	-1.72%
NIFTY METAL	11292.50	11863.90	-4.82%
NIFTY PHARMA	22832.20	23275.20	-1.90%
NIFTY REALTY	709.80	719.50	-1.35%
BSE CG	67620.20	69704.67	-2.99%
BSE CD	55011.77	56343.49	-2.36%
BSE Oil & GAS	26864.10	27497.69	-2.30%
BSE POWER	6922.20	7057.01	-1.91%

(Source: [Investing.com](https://www.investing.com))

Nifty Vs. INDIA VIX



(Source: [NSE](https://www.nse.com))

Markets end turbulent week with sharp losses amid global jitters

Indian equity benchmarks ended the week with sharp losses, as sustained selling pressure and weak global cues weighed on market sentiment. Investor confidence remained fragile amid escalating geopolitical tensions in the Middle East and concerns over the global growth outlook. On the domestic front, retail inflation edged higher in February, driven largely by a rise in food prices, adding to the cautious undertone in the market. However, India's foreign exchange reserves rose to a record high, providing some macroeconomic comfort. Despite a brief relief rally during the week, the broader market trend remained weak, with volatility persisting and heavy selling pressure intensifying in the final trading session.

In the week ended on Friday, 13 March 2026, the S&P BSE Sensex tanked 4,354.98 points or 5.52% to settle at 74,563.92. The Nifty 50 index slides 1,299.35 points or 5.31% to settle at 23,151.10. The BSE 150 Mid-Cap index tumbled 4.29% to close at 14,843.66. The BSE 250 Small-Cap fell 3.75% to end at 5,875.64.

FII & DII Activities (Rs Crore)

06/03/2026 to 13/03/2026

Activities	FIIs	DII's
Buy	85272.08	116642.89
Sell	120406.17	71931.60
Net	-35134.09	44711.29

(Source: Capitaline)

Sensex Gainers - Weekly

SCRIPS	13-Mar-26	06-Mar-26	%Ch
WIPRO	197.55	195.50	1.05
NTPC	384.45	380.45	1.05
POWERGRID	300.70	299.20	0.50
SUNPHARMA	1800.50	1798.95	0.09

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	13-Mar-26	06-Mar-26	%Ch
LT	3440.95	3948.85	-12.86
ULTRACEMCO	10607.00	11986.75	-11.51
M&M	2951.20	3333.70	-11.47
INDUSINDBK	814.45	916.70	-11.15
MARUTI	12588.45	14149.15	-11.03

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	13-Mar-26	06-Mar-26	%Ch
COALINDIA	467.00	440.45	6.03
WIPRO	197.58	195.40	1.12
NTPC	384.45	380.60	1.01
POWERGRID	300.95	299.15	0.60
SUNPHARMA	1801.60	1799.40	0.12

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	13-Mar-26	06-Mar-26	%Ch
LT	3439.00	3949.80	-12.93
M&M	2931.10	3332.50	-12.05
EICHERMOT	6741.00	7620.50	-11.54
ULTRACEMCO	10616.00	11987.00	-11.44
INDUSINDBK	814.40	917.85	-11.27

(Source: Capitaline)

India's retail inflation rose to 3.21% YoY in February from a revised 2.74% in January, driven by higher food prices, government data showed on Thursday.

Food inflation stood at 3.47% YoY in February compared with 2.13% in the previous month.

West Asia Conflict:

Iran vowed on Friday to inflict what its foreign ministry spokesperson described as an "unforgettable lesson" on its adversaries, the United States and Israel, as the Middle East conflict approached the two-week mark.

Intense strikes were reported in Tehran and surrounding areas, while Iran continued attacks targeting neighbouring Arab Gulf states, pushing global oil prices back above the \$100-per-barrel mark.

The conflict involving the United States, Israel and Iran is set to enter its third week with no signs of de-escalation, as missile strikes, drone attacks and air raids continue across the Middle East.

Global Markets:

German inflation eased slightly to 2.0% in February, the Federal Statistical Office of Germany said on Wednesday, confirming preliminary estimates. Inflation, measured by the Harmonised Index of Consumer Prices (HICP) to allow comparison with other European Union countries, had stood at 2.1% year-on-year in January.

The U.S. Bureau of Labor Statistics reported that nonfarm payrolls fell by 92,000 in February, sharply reversing the downwardly revised gain of 126,000 in January and missing expectations. The unemployment rate also edged up to 4.4% from 4.3%.

(Source: Capitaline)

Nifty Midcap 100 Gainers - Weekly

SCRIPS	13-Mar-26	06-Mar-26	%Ch
LTTTS	3430.10	3187.40	7.61
ADANIPOWER	146.57	138.99	5.45
SYNGENE	420.85	399.70	5.29
AUROPHARMA	1296.50	1231.90	5.24
JSWENERGY	512.95	488.20	5.07

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	13-Mar-26	06-Mar-26	%Ch
POLYCAB	7193.50	8552.00	-15.89
BHARATFORG	1675.10	1923.90	-12.93
ASHOKLEY	170.65	194.67	-12.34
TVSMOTOR	3324.50	3784.00	-12.14
IDFCFIRSTB	62.57	69.98	-10.59

(Source: Capitaline)

World Markets

KEY INDICES	13-Mar-26	06-Mar-26	%Ch
DJIA	46558.47	47501.55	-1.99
NASDAQ	22105.36	22387.68	-1.26
BOVESPA	177653.31	179364.81	-0.95
FTSE 100	10261.15	10284.75	-0.23
CAC 40	7911.53	7993.49	-1.03
DAX	23447.29	23591.03	-0.61
MOEX RUSSIA	2871.86	2854.11	0.62
NIKKEI 225	53819.61	55620.84	-3.24
HANG SENG	25465.60	25757.29	-1.13
STRAITS TIMES	4842.27	4848.25	-0.12
SHANGHAI COMPOSITE	4095.45	4124.19	-0.70
JAKARTA	7137.21	7585.69	-5.91

(Source: Capitaline, [Investing.com](https://www.investing.com))

Outlook and Technical View

US-Israel war with Iran to remain in focus. Beside war-like situation between Pakistan-Afghanistan may further create new geo-political tension. Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 23012, 22872, 23632, 23502 while levels of 23392, 23632, 23772, 23952 may act as resistance with pivot point at 23252.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	30-Mar-26	23228.40	24565.20	-5.44%	77.30	798585	628308	27.10%
BANKNIFTY	30-Mar-26	53888.00	58020.00	-7.12%	130.15	150558	143130	5.19%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDEA	9.27	9.31	30-Mar-26	9.26%
RBLBANK	294.75	296.00	30-Mar-26	9.11%
JINDALSTEL	1143.30	1147.90	30-Mar-26	8.64%
EICHERMOT	6741.00	6766.00	30-Mar-26	7.96%
BOSCHLTD	30185.00	30295.00	30-Mar-26	7.82%
MARUTI	12591.00	12636.00	30-Mar-26	7.67%
AMBUJACEM	425.35	426.85	30-Mar-26	7.57%
ASHOKLEY	170.65	171.25	30-Mar-26	7.55%
MFSL	1628.10	1633.80	30-Mar-26	7.52%
HDFCLIFE	625.75	627.90	30-Mar-26	7.38%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
VOLTAS	1414.20	1399.30	30-Mar-26	-22.62%
PFC	405.60	402.15	30-Mar-26	-18.26%
HCLTECH	1325.40	1315.40	30-Mar-26	-16.20%
RECLTD	331.50	329.05	30-Mar-26	-15.87%
BAJAJ-AUTO	8875.00	8835.00	30-Mar-26	-9.68%
WIPRO	197.58	196.79	30-Mar-26	-8.58%
VEDL	689.55	687.65	30-Mar-26	-5.92%
INDUSINDBK	814.40	812.45	30-Mar-26	-5.14%
SAIL	149.89	149.60	30-Mar-26	-4.15%
ADANIENT	1961.10	1958.40	30-Mar-26	-2.96%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	65841425	63934950	1.03

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. ADANIPOWER	2. ABB	3. TATAPOWER	4. JSWENERGY	5. BHARATFORG
6. ASHOKLEY	7. TVSMOTOR	8. M&M	9. EICHERMOT	10. MARUTI
11. TMPV	12. TUBEINVEST	13. UNOMINDA	14. BAJAJ-AUTO	15. BOSCHLTD
16. MOTHERSON	17. EXIDE	18. SONACOMS	19. HEROMOTOCO	

(Source: [Moneycontrol](#))

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