

Market Snapshot

KEY INDICES	20-Feb-26	13-Feb-26	05-Sep-25
S&P CNX NIFTY	25571.25	25471.10	0.39
SENSEX	82814.71	82626.76	0.23
NIFTY MIDCAP 100	59513.95	59438.00	0.13
NIFTY SMLCAP 100	17002.15	17032.90	-0.18

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

Sectoral Snapshot

KEY INDICES	20-Feb-26	13-Feb-26	%Ch
NIFTY BANK	61172.00	60186.65	1.64
NIFTY AUTO	27846.80	28234.30	-1.37
NIFTY FMCG	51772.70	50902.15	1.71
NIFTY IT	32004.05	32681.50	-2.07
NIFTY METAL	11989.95	11872.80	0.99
NIFTY PHARMA	22452.40	22194.90	1.16
NIFTY REALTY	820.70	823.60	-0.35
BSE CG	69612.86	68243.17	2.01
BSE CD	59219.12	58879.99	0.58
BSE Oil & GAS	28977.11	28595.04	1.34
BSE POWER	6883.67	6713.57	2.53

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

FII & DII Activities (Rs Crore)

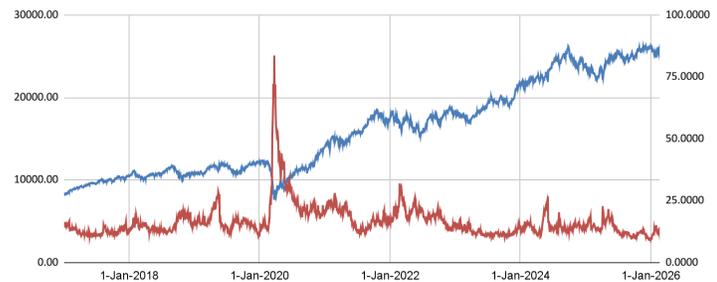
13/02/2026 to 20/02/2026

Activities	FIIs	DIIs
Buy	73460.21	84739.34
Sell	75319.89	74850.15
Net	-1859.68	9889.19

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Indices end with decent gains; Nifty closed above 25,550 mark

Indian equity benchmarks ended the week with moderate gains. The Sensex and Nifty gained in four out of five trading sessions. Market sentiment remained positive as investors responded favourably to the AI summit held in India, overshadowing weak economic data and global cues. During the week, key economic data releases from the UK, the US, and India were closely tracked, which are likely to influence the market's growth trajectory in the coming sessions.

Market participants will monitor crude oil prices, movements in gold and silver prices, upcoming initial public offers (IPOs) and broader global cues for further direction.

In the week ended on Friday, 20 February 2026, the S&P BSE Sensex advanced 187.95 points or 0.23% to settle at 82,814.71. The Nifty 50 index added 100.15 points or 0.39% to settle at 25,571.25. The BSE 150 Mid-Cap index rose 0.34% to close at 16,085.18. The BSE 250 Small-Cap index declined 0.27% to close at 6,333.65.

Sensex Gainers - Weekly

SCRIPS	20-Feb-26	13-Feb-26	%Ch
LT	4380.25	4172.90	4.97
ITC	327.00	313.60	4.27
POWERGRID	298.90	287.40	4.00
NTPC	373.05	362.95	2.78
ASIANPAINT	2428.35	2364.20	2.71

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	20-Feb-26	13-Feb-26	%Ch
TECHM	1457.15	1535.25	-5.09
M&M	3413.00	3533.80	-3.42
WIPRO	209.95	214.10	-1.94
MARUTI	14987.55	15227.40	-1.58
ULTRACEMCO	12764.40	12964.65	-1.54

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	20-Feb-26	13-Feb-26	%Ch
LT	4380.60	4173.90	4.95
HDFCLIFE	728.65	696.80	4.57
ITC	327.00	313.75	4.22
ONGC	278.65	267.40	4.21
GAIL	168.47	161.69	4.19

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	20-Feb-26	13-Feb-26	%Ch
TECHM	1456.90	1534.40	-5.05
M&M	3412.80	3533.40	-3.41
HEROMOTOCO	5465.00	5584.00	-2.13
BPCL	366.30	374.10	-2.09
WIPRO	209.86	214.09	-1.98

(Source: Capitaline)

India's wholesale price index (WPI) inflation accelerated to 1.81% in January 2026 from 0.83% in December 2025. The uptick was driven by higher prices in basic metals, other manufacturing, non-food articles, food articles and textiles, among other categories. Food inflation rose to 1.41% in January after remaining flat at 0.00% in the previous month.

India's trade engine gathered pace in January 2026, but imports ran faster than exports. Total exports, including merchandise and services, were estimated at \$80.45 billion in January, up 13.17% from a year earlier. Imports stood at \$90.83 billion, rising a sharper 18.76% YoY. Breaking it down, merchandise exports in January edged up to \$36.56 billion from \$36.34 billion last year. Merchandise imports, however, jumped to \$71.24 billion from \$59.77 billion, widening the goods trade gap. Services exports surged to \$43.90 billion from \$34.75 billion, while services imports rose to \$19.60 billion from \$16.71 billion.

HSBC India Services PMI eased to 58.4 in February 2026 compared with 58.5 in January 2026, with exports rising fastest since August 2025, domestic demand easing, modestly faster hiring, and input costs hitting a 2.5-year high. Selling prices and business sentiment rose to a one-year peak. HSBC India Manufacturing PMI climbed to 57.5 in February 2026 compared with 55.4 in January 2026, led by strong domestic demand, modest export growth, higher employment, inputs, and inventories. Input and output prices rose, while sentiment remained positive. HSBC India Composite PMI hit 59.3 in February 2026 as against 58.4 in January 2026.

Global Markets:

Japan reported that its economy grew just 0.1% on an annualized basis in the December quarter, much lower than expectations, mainly due to lower government spending.

UK's unemployment rate rose to a five-year high while wage growth slowed. The jobless rate climbed to 5.2% in the final quarter of last year, the Office for National Statistics said

Nifty Midcap 100 Gainers - Weekly

SCRIPS	20-Feb-26	13-Feb-26	%Ch
PNB	129.59	118.76	9.12
UNIONBANK	193.98	178.87	8.45
INDIANB	946.70	873.70	8.36
CUMMINSIND	4733.90	4412.40	7.29
BANKINDIA	171.70	161.79	6.13

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	20-Feb-26	13-Feb-26	%Ch
PERSISTENT	5092.00	5479.00	-7.06
APOLLOTYRE	455.35	489.65	-7.01
ZEEL	90.70	96.20	-5.72
ABFRL	69.85	73.80	-5.35
BATAINDIA	811.90	852.25	-4.73

(Source: Capitaline)

World Markets

KEY INDICES	20-Feb-26	13-Feb-26	%Ch
DJIA	49625.97	49500.93	0.25
NASDAQ	22886.07	22546.67	1.51
BOVESPA	190534.42	186464.30	2.18
FTSE 100	10686.89	10446.35	2.30
CAC 40	8515.49	8311.74	2.45
DAX	25260.69	24914.88	1.39
MOEX RUSSIA	2780.60	2776.34	0.15
NIKKEI 225	56825.70	56941.97	-0.20
HANG SENG	26413.35	26567.12	-0.58
STRAITS TIMES	5017.60	4937.78	1.62
SHANGHAI COMPOSITE	CLOSED	4082.07	-
JAKARTA	8271.77	8212.27	0.72

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

Tuesday, the highest since early 2021 and above the 5.1% economists were forecasting.

In U.S, reflecting a surge in imports and a slump in exports, the Commerce Department released a report on Thursday showing the U.S. trade deficit unexpectedly widened in the month of December. The Commerce Department said the trade deficit grew to \$70.3 billion in December from a revised \$53.0 billion in November.

Data from the Bureau of Labor Statistics showed that US Consumer prices rose 0.2% in January compared to the previous month and increased 2.4% compared to a year earlier.

(Source: Capitaline)

Outlook and Technical View

Volatile geopolitical development in Iran to remain in focus. 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 25412, 25254, 25128, 25002 while levels of 25696, 25822, 25980, 20182 may act as resistance with pivot point at 25538.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	24-Feb-26	25584.70	25481.00	0.41%	13.45	493360	646893	-23.73%
BANKNIFTY	24-Feb-26	61161.20	60267.00	1.48%	-10.80	57886	83916	-31.02%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	158.75	159.23	24-Feb-26	27.59%
JUBLFOOD	532.40	534.00	24-Feb-26	27.42%
HINDUNILVR	2314.50	2320.70	24-Feb-26	24.44%
BOSCHLTD	35215.00	35300.00	24-Feb-26	22.03%
HCLTECH	1436.50	1439.90	24-Feb-26	21.60%
SHREECEM	26510.00	26570.00	24-Feb-26	20.65%
JINDALSTEL	1217.10	1219.80	24-Feb-26	20.24%
HDFCBANK	911.85	913.85	24-Feb-26	20.01%
DRREDDY	1280.40	1282.90	24-Feb-26	17.82%
TORNTPOWER	1528.60	1531.40	24-Feb-26	16.71%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
GODREJPROP	1825.70	1819.40	24-Feb-26	-31.49%
ONGC	278.65	277.70	24-Feb-26	-31.11%
NTPC	372.95	371.70	24-Feb-26	-30.58%
AUROPHARMA	1158.80	1155.20	24-Feb-26	-28.35%
LT	4380.60	4367.10	24-Feb-26	-28.12%
BAJFINANCE	1030.20	1027.10	24-Feb-26	-27.46%
BANKBARODA	309.05	308.30	24-Feb-26	-22.14%
VEDL	682.45	680.85	24-Feb-26	-21.39%
INFY	1353.20	1350.10	24-Feb-26	-20.90%
HINDALCO	935.70	933.60	24-Feb-26	-20.48%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	173499950	198948490	0.87

(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. THERMAX	2. POWERINDIA	3. CGPOWER	4. TORNTPOWER	5. JSWENERGY
6. POWERGRID	7. ABB	8. PERSISTENT	9. TECHM	10. LTIM
11. MPHASIS				

(Source: [Moneycontrol](#))

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