

Market Snapshot

KEY INDICES	27-Feb-26	20-Feb-26	05-Sep-25
S&P CNX NIFTY	25178.65	25571.25	-1.54
SENSEX	81287.19	82814.71	-1.84
NIFTY MIDCAP 100	59115.60	59513.95	-0.67
NIFTY SMLCAP 100	16928.90	17002.15	-0.43

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

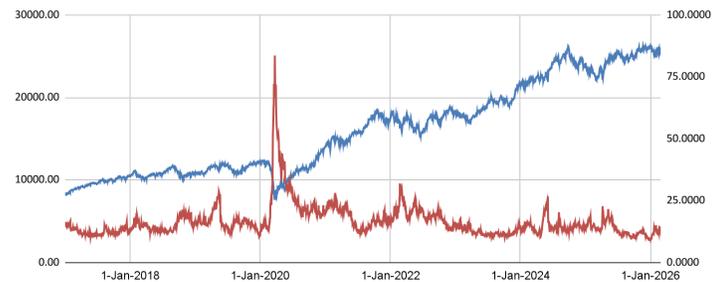
Sectoral Snapshot

KEY INDICES	27-Feb-26	20-Feb-26	%Ch
NIFTY BANK	60529.00	61172.00	-1.05
NIFTY AUTO	28158.85	27846.80	1.12
NIFTY FMCG	51142.20	51772.70	-1.22
NIFTY IT	30603.85	32004.05	-4.38
NIFTY METAL	12240.65	11989.95	2.09
NIFTY PHARMA	22952.35	22452.40	2.23
NIFTY REALTY	780.60	820.70	-4.89
BSE CG	70454.47	69612.86	1.21
BSE CD	59193.44	59219.12	-0.04
BSE Oil & GAS	29595.66	28977.11	2.13
BSE POWER	6967.06	6883.67	1.21

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

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Benchmarks end with major losses; Nifty ends below 25,200 level

Indian equity benchmarks ended the week lower, due to sustained foreign institutional investor (FII) outflows and a sharp correction in information technology stocks. Volatility linked to the monthly F&O expiry further amplified market swings. Additionally, weak global cues and heightened geopolitical tensions kept investor sentiment cautious. Despite brief mid-week recoveries, persistent selling in index heavyweights led to a negative weekly close.

In the week ended on Friday, 27 February 2026, the S&P BSE Sensex tanked 1,527.52 points or 1.84% to settle at 81,287.19. The Nifty 50 index fell 392.6 points or 1.53% to settle at 25,178.65. The BSE 150 Mid-Cap index fell 1.09% to close at 16,007.94. The BSE 250 Small-Cap index declined 0.86% to close at 6,290.95.

IDFC First Bank slumped 12.06%. The bank said that it has uncovered fraudulent transactions worth around Rs 590 crore at one of its branches in Chandigarh, allegedly involving a few employees.

FII & DII Activities (Rs Crore)

20/02/2026 to 27/02/2026

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

(Source: Capitaline)

Sensex Gainers - Weekly

SCRIPS	27-Feb-26	20-Feb-26	%Ch
INDUSINDBK	959.00	925.50	3.62
NTPC	381.85	373.05	2.36
TITAN	4328.40	4235.60	2.19
TATASTEEL	212.35	208.25	1.97
TMPV	383.15	377.90	1.39

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	27-Feb-26	20-Feb-26	%Ch
TECHM	1357.25	1457.15	-6.86
BHARTIARTL	1879.75	1977.70	-4.95
WIPRO	200.90	209.95	-4.31
ITC	313.60	327.00	-4.10
INFY	1299.95	1352.75	-3.90

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	27-Feb-26	20-Feb-26	%Ch
IOC	187.47	173.79	7.87
BPCL	385.40	366.30	5.21
HERMOTOCO	5710.00	5465.00	4.48
INDUSINDBK	956.75	926.05	3.32
NTPC	381.90	372.95	2.40

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	27-Feb-26	20-Feb-26	%Ch
UPL	637.40	752.35	-15.28
TECHM	1357.80	1456.90	-6.80
BHARTIARTL	1879.30	1977.40	-4.96
WIPRO	200.96	209.86	-4.24
ITC	313.60	327.00	-4.10

(Source: Capitaline)

Meanwhile, AU Small Finance Bank slumped 6.83%. The Haryana government decisively removed the bank from its list of empanelled lenders due to serious allegations of fraudulent activities. In a statement, the bank said that on 18 February 2026, it received a separate communication from the department seeking information regarding suspected unauthorised transactions between a government account and another customer account. As of 21 February 2026, deposits from the Government of Haryana with AU Small Finance Bank stood at Rs 538 crore across nearly 200 accounts, accounting for about 0.4% of the bank's overall deposits as of 31 December 2026.

India's economy expanded 7.8% in the December quarter, beating expectations and reflecting the impact of a revamped GDP calculation framework aimed at improving accuracy. Growth for the previous quarter has been revised up to 8.4% from 8.2% under the new series, while the full-year FY26 estimate has been raised to 7.6% from 7.4%.

In January, the Ministry of Statistics & Programme Implementation introduced changes to the GDP, inflation and industrial production series, including shifting the GDP base year to FY23 from 2012, to enhance data quality and policy relevance.

Pakistan has launched Operation Ghazab lil-Haq against the Afghan Taliban, citing what it described as "unprovoked aggression" along the border, as clashes between the two neighbours intensified. In a declared "open war," Pakistan launched overnight airstrikes in Afghanistan, heavily bombing multiple key cities, including Kabul and Kandahar, and claiming that 133 people were killed in what Islamabad called a "strong and effective" retaliation for "unprovoked firing" from across the border.

Prime Minister Narendra Modi's visit to Israel comes against the backdrop of ongoing India-Israel free trade agreement talks aimed at enhancing trade and investment between the two countries. Israeli President Isaac Herzog described India as "an essential part of a great future for the Middle East", while emphasising the growing importance of India-Israel

Nifty Midcap 100 Gainers - Weekly

SCRIPS	27-Feb-26	20-Feb-26	%Ch
SUNTV	647.65	584.65	10.78
POLYCAB	8610.50	7869.00	9.42
BHARATFORG	1911.20	1780.00	7.37
TUBEINVEST	2753.40	2585.80	6.48
BANDHANBNK	181.98	171.35	6.20

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	27-Feb-26	20-Feb-26	%Ch
IDFCFIRSTB	73.48	83.51	-12.01
COFORGE	1185.80	1340.60	-11.55
IRFC	103.55	111.88	-7.45
TATAELXI	4513.00	4859.00	-7.12
PERSISTENT	4733.00	5092.00	-7.05

(Source: Capitaline)

World Markets

KEY INDICES	27-Feb-26	20-Feb-26	%Ch
DJIA	48977.92	49625.97	-1.31
NASDAQ	22668.21	22886.07	-0.95
BOVESPA	188786.98	190534.42	-0.92
FTSE 100	10910.55	10686.89	2.09
CAC 40	8580.75	8515.49	0.77
DAX	25284.26	25260.69	0.09
MOEX RUSSIA	2799.14	2780.60	0.67
NIKKEI 225	58850.27	56825.70	3.56
HANG SENG	26630.54	26413.35	0.82
STRAITS TIMES	4995.07	5017.60	-0.45
SHANGHAI COMPOSITE	4162.88	4082.07	1.98
JAKARTA	8235.49	8271.77	-0.44

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

cooperation during his bilateral meeting with Prime Minister Narendra Modi as part of the latter's two-day state visit to the country.

Global Markets:

China's central bank kept its benchmark lending rates unchanged, maintaining the one-year Loan Prime Rate (LPR) at 3% and the five-year LPR at 3.5%.

In the U.S., the economy expanded at an annualized rate of 1.4% in Q4 2025, the slowest pace since Q1 2025. This follows a 4.4% growth recorded in Q3 and came in well below market forecasts of 3%, according to the advance estimate.

(Source: Capitaline)

Outlook and Technical View

Volatile geopolitical development in 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 25054, 24830, 24719, 25602 while levels of 25389, 25600, 25724, 25802 may act as resistance with pivot point at 25265.

(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	25341.00	25741.00	-1.55%	162.35	570040	224463	153.96%
BANKNIFTY	30-Mar-26	60870.00	61545.00	-1.10%	341.00	98172	56936	72.43%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
GODREJPROP	1731.00	1804.20	30-Mar-26	49.79%
MANAPPURAM	283.25	294.95	30-Mar-26	48.63%
ICICIPRULI	654.50	676.65	30-Mar-26	39.85%
HDFCLIFE	715.30	738.35	30-Mar-26	37.94%
BHARTIARTL	1879.30	1939.70	30-Mar-26	37.84%
SUNPHARMA	1737.00	1791.50	30-Mar-26	36.94%
MUTHOOTFIN	3353.50	3457.40	30-Mar-26	36.48%
IDEA	10.59	10.91	30-Mar-26	35.58%
DRREDDY	1286.30	1324.30	30-Mar-26	34.78%
GRASIM	2799.80	2882.00	30-Mar-26	34.57%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SIEMENS	3418.60	3354.20	30-Mar-26	-22.18%
PETRONET	323.40	318.25	30-Mar-26	-18.75%
JUBLFOOD	519.90	512.55	30-Mar-26	-16.65%
HCLTECH	1389.10	1375.90	30-Mar-26	-11.19%
VOLTAS	1561.30	1550.60	30-Mar-26	-8.07%
IDFCFIRSTB	73.48	73.05	30-Mar-26	-6.89%
INFY	1300.10	1294.80	30-Mar-26	-4.80%
GLENMARK	2136.70	2134.60	30-Mar-26	-1.16%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	55487605	45105870	1.23

(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. MANKIND	2. LAURUSLABS	3. IPCALAB	4. AUROPHARMA	5. ALKEM
6. GLENMARK	7. LUPIN	8. JBCHEPHARM	9. ZYDUSLIFE	10. TORNTPHARM
11. SOBHA	12. LODHA	13. PRESTIGE	14. BRIGADE	15. GODREJPROP
16. PHOENIXLTD	17. DLF	18. ANANTRAJ		

(Source: [Moneycontrol](#))

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