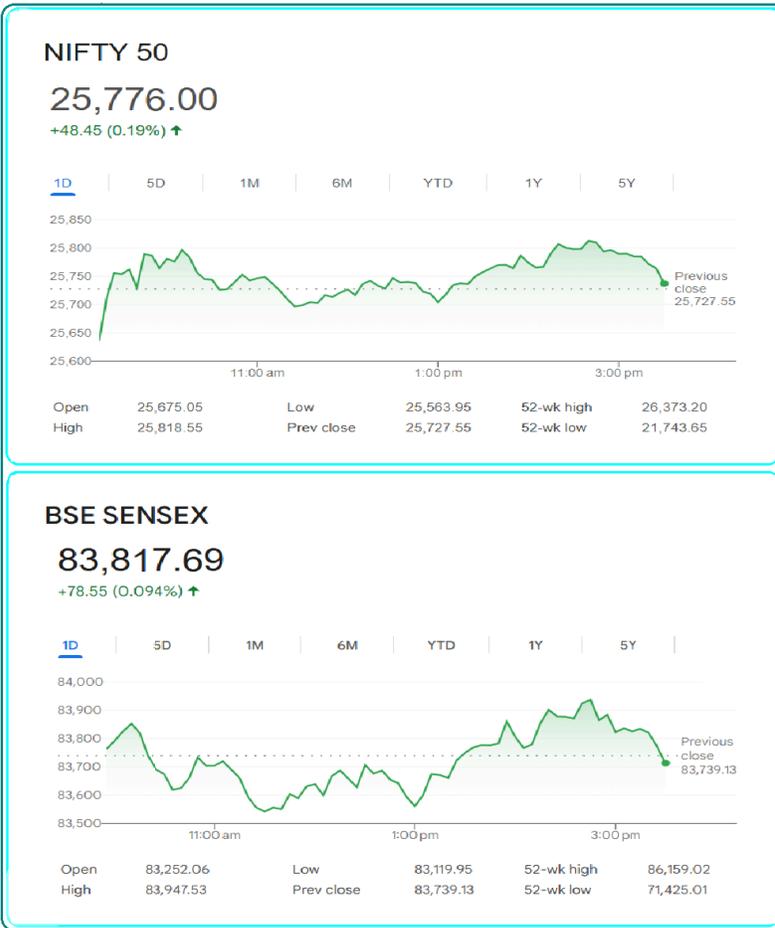


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25776.00	25727.55	0.19%
S&P BSE SENSEX	83817.69	83739.13	0.09%
NIFTY MID100	59683.60	59307.10	0.63%
NIFTY SML100	17205.10	16988.95	1.27%

(Source: [NSE](#), [BSE](#))

Market Wrap Up

- The key equity benchmarks ended with small gains today, extending rally for a third consecutive session after initial intraday weakness was absorbed by robust buying. Investor sentiment was underpinned by the landmark India-US trade agreement, which reduced external uncertainty and bolstered confidence in near-term economic and corporate growth prospects. Market recovery also reflects tactical buying by funds anticipating positive spillovers from trade and policy developments. The Nifty settled above the 25,750 mark. The S&P BSE Sensex added 78.56 points or 0.09% to 83,817.69. The Nifty 50 index rose 48.45 points or 0.19% to 25,776. In three consecutive trading sessions, the Sensex added 3.83% while the Nifty jumped 3.82%. The BSE 150 MidCap Index advanced 0.61% and the BSE 250 SmallCap Index rose 0.54%. Among the sectoral indices, the Nifty Consumer Durables index (up 2.66%), the Nifty Oil & Gas index (up 2.08%) and the Nifty Auto index (up 1.18%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 5.87%), the Nifty Pharma index (down 0.34%) and the Nifty Healthcare index (up 0.13%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **February** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **1172** contracts at the end of the day.
- Long** position build up for the **February** series has been witnessed in **RELIANCE, ONGC, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- Short** position build up for the **February** series has been witnessed in **INFY, HCLTECH, WIPRO**.
- Unwinding** position for the **February** series has been witnessed in **ITC, NESTLEIND**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	60238.15	60041.30	0.33%
NIFTY AUTO	27825.40	27500.30	1.18%
NIFTY FMCG	50922.75	50806.65	0.23%
NIFTY IT	36345.65	38611.75	-5.87%
NIFTY METAL	12044.25	11893.20	1.27%
NIFTY PHARMA	22125.80	22200.25	-0.34%
NIFTY REALTY	824.45	815.30	1.12%
BSE CG	68205.66	68093.03	0.17%
BSE CD	57976.73	56638.93	2.36%
BSE Oil & GAS	29023.80	28352.89	2.37%
BSE POWER	6799.17	6654.21	2.18%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	54293.36	54720.66	-0.78%
HANG SENG	26847.32	26834.77	0.05%
STRAITS TIMES	4965.50	4944.09	0.43%
SHANGHAI	4102.20	4067.74	0.85%
KOSPI	5371.10	5288.08	1.57%
JAKARTA	8146.72	8122.60	0.30%
TAIWAN	32289.81	32195.36	0.29%
KLSE COMPOSITE	1742.82	1748.26	-0.31%
ALL ORDINARIES	9204.60	9149.30	0.60%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	135526.90	174055.95
NSE F&O	179194.75	350418.17

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	29.79
NET SELL	-

(Source: [NSE](#))

Corporate News

- Bajaj Finance** reported a consolidated net profit of Rs 3,978 crore for the October-December quarter of financial year 2026, marking a 6 percent YoY fall from the Rs 4,246.54 crore net profit reported in the same period of the previous financial year. NII increased by 21 percent YoY to Rs 11,317 crore in Q3 FY26.
- Bajaj Finserv** posted consolidated net profit declined 0.08% to Rs 2229.15 crore in the quarter ended December 2025 as against Rs 2231.00 crore during the previous quarter ended December 2024. Sales rose 24.88% to Rs 39096.96 crore in the quarter ended December 2025 as against Rs 31306.53 crore during the previous quarter ended December 2024.
- Adani Enterprises** posted consolidated net profit at Rs 5,627 crore in October-December period, the third quarter of the 2025-26 financial year -- compared with Rs 58 crore earnings in the same period a year back. Revenue was up 8.6 percent at Rs 24,820 crore in the quarter under review. The top line came in at Rs 22,848 crore in the same quarter a year ago.
- Kansai Nerolac Paints** posted standalone net profit tanked 75.08% to Rs 131.20 crore in Q3 FY26, compared with Rs 526.49 crore in Q3 FY25. Revenue rose 3.53% to Rs 1,907.35 crore in Q3 FY26 as against Rs 1,842.16 crore posted in the same quarter last year.
- Jain Irrigation Systems** posted consolidated net loss to Rs 41.86 crore in the quarter ended December 2025 as against net profit of Rs 0.95 crore during the previous quarter ended December 2024. Sales rose 17.40% to Rs 1597.58 crore in the quarter ended December 2025 as against Rs 1360.78 crore during the previous quarter ended December 2024.
- Emami** reported 14.5% increase in consolidated to Rs 319.48 crore on a 9.8% rise in revenue from operations to Rs 1,151.81 crore in Q3 FY26 as compared with Q3 FY25. The company's board has declared second interim dividend of Rs 6 per share for the financial year 2025-26.
- LIC Housing Finance** posted consolidated net sales at Rs 7,208.92 crore in December 2025 up 1.97% from Rs. 7,069.99 crore in December 2024. Net profit at Rs. 1,398.02 crore in December 2025 down 2.57% from Rs. 1,434.84

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	294.15	279.80	5.13%
TRENT	4012.60	3822.80	4.96%
ONGC	266.95	257.00	3.87%
NTPC	367.25	358.55	2.43%
ADANI PORTS	1567.90	1530.80	2.42%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1535.80	1656.00	-7.26%
TCS	2999.10	3225.30	-7.01%
HCLTECH	1621.80	1695.30	-4.34%
TECHM	1645.30	1716.50	-4.15%
WIPRO	233.34	242.69	-3.85%

(Source: [Moneycontrol](#))

- **Bharat Heavy Electricals** has received a Letter of Intent from Hindalco Industries for a major power equipment order. The order, awarded through a domestic tender, is valued at approximately Rs 1,200-1,500 crore.
- **Zydu Lifesciences** has received tentative approval from the United States Food and Drug Administration (USFDA) for Dapagliflozin Tablets, 5 mg and 10 mg (USRLD: Farxiga® Tablets, 5 mg and 10 mg).
- **Mahindra & Mahindra** has secured its biggest export deal. The company will supply 35,000 Scorpio Pik Ups to Indonesia in 2026. These vehicles will strengthen rural cooperatives and improve food logistics.

crore in December 2024.

- **NIIT** posted consolidated net sales at Rs 101.37 crore in December 2025 up 3.32% from Rs. 98.11 crore in December 2024. Net profit at Rs. 3.95 crore in December 2025 down 70.51% from Rs. 13.40 crore in December 2024.
- **Solar Industries India** reported a 38.23% jump in consolidated net profit to Rs 466.54 crore in Q3 FY26, compared to Rs 337.50 crore posted in Q3 FY25. Revenue from operations increased 29.15% YoY to Rs 2548.32 crore for the quarter ended 31 December 2025.
- **DLF** has completed a significant deal selling its Kolkata tech park and 25.9 acres of land to Srijan Group for Rs 670 crore. The transaction involved the sale of a tech park and vacant land. DLF Cyber City Developers Limited reported strong revenue and EBITDA growth in Q3FY26.
- **Devyani International** has approved the acquisition of 11.4% additional equity stake in Sky Gate Hospitality (Sky Gate) from the Promoters/ Founders of Sky Gate for a total consideration of Rs 57.5 crore through a mix of cash and issuance of Non-Convertible Redeemable Preference Shares. Upon completion of acquisition, Sky Gate will become a wholly-owned subsidiary of the Company.
- **Axiscades Technologies**'s subsidiary Mistral Solutions secured international contracts worth around \$1.4 million from Axon Enterprise Inc. and Stratacache Inc., USA.
- **RITES** has recommended a Third Interim Dividend of Rs.1.90 per share (i.e.19%).

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- China RatingDog General Composite PMI rose to 51.6 in January 2026 from 51.3 in the previous month. The services PMI increased to 52.3 in January 2026 from December's six-month low of 52.0.
- U.K. S&P Global Composite PMI rose to 53.7 in January of 2026 from 51.4 in the previous month. The services PMI rose to 54 in January from 51.4 in December, below preliminary estimates of 54.3.
- Eurozone annual inflation eased to 1.7% year-on-year in January 2026, down from 2.0% in December. Core inflation fell to

2.2% in January of 2026 from 2.3% in the earlier month. The CPI decreased 0.50 percent in January of 2026 over the previous month.

- Eurozone industrial producer prices decreased 0.3% month-over-month in December 2025, following a 0.7% increase in November. On an annual basis, producer prices fell 1.7%, marking the fourth consecutive month of year-on-year decline.
- Eurozone HCOB Flash Composite PMI inched lower to 51.3 in January of 2026 from the 51.5 in the previous month, revised downwards from 51.5. The services PMI decreased to 51.6 in January from 52.4 in December of 2025.
- Germany's HCOB Composite PMI increased to 52.1 in January 2026 from 51.3 in December. The services PMI fell to 52.4 in January from 52.7 in December.
- France's HCOB Composite PMI for January 2026 was revised higher to 49.1 from a flash estimate of 48.6, but remained below December's 50.0. The services PMI fell to 48.4 in January 2026, revised upward from the preliminary estimates of 47.9, compared with 50.1 in December.
- Japan's S&P Global Composite PMI rose to 53.1 in January 2026, above the flash estimate of 52.8 and up from 51.1 in December. The services PMI rose to 53.7 in January 2026, surpassing the flash estimate of 53.4 and December's 51.6.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 63.37/bbl (IST 17:00).
- INR weakened to Rs. 90.43 from Rs. 90.27 against each US\$ resulting in daily change of 0.18%.
- India's Composite PMI by HSBC came in at 58.4 in January 2026, below the flash print of 59.5 yet higher than December's 11-month low of 57.8. The services PMI was revised lower to 58.5 in January 2026 from a preliminary estimate of 59.3, following a final reading of 58.0 in December 2025.
- The Employees' Provident Fund Organisation (EPFO) is expected to marginally reduce the interest rate on provident fund deposits for 2025-26 to 8-8.20%, as against 8.25% announced for 2024-25, when it holds its 239th Central Board of Trustees (CBT) meeting in the first week of March, to avoid eating into its corpus.
- Gold and silver import prices have been reduced by India's government. This action lowers the customs duty on these precious metals. The move comes as global prices for gold and silver are near record highs. India is a major consumer of gold and the largest market for silver. The government typically revises these prices every two weeks.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 05/02/2026

Bharti Airtel Limited	Financial Results
Life Insurance Corporation Of India	Financial Results
Tata Motors Passenger Vehicles Limited	Financial Results
Bharti Hexacom Limited	Financial Results
Berger Paints (I) Limited	Financial Results
Bajel Projects Limited	Financial Results
Dalmia Bharat Sugar and Industries Limited	Financial Results/Dividend
Hero MotoCorp Limited	Financial Results/Dividend
Power Finance Corporation Limited	Financial Results/Dividend
Aavas Financiers Limited	Financial Results
Aditya Birla Fashion and Retail Limited	Financial Results
Alembic Pharmaceuticals Limited	Financial Results
Allcargo Logistics Limited	Financial Results
Astral Limited	Financial Results
BLACKBUCK LIMITED	Financial Results
BLS E-Services Limited	Financial Results/Dividend
CL Educate Limited	Financial Results/Fund Raising
Data Patterns (India) Limited	Financial Results
Deep Industries Limited	Financial Results
Dhanuka Agritech Limited	Financial Results
D-Link (India) Limited	Financial Results
Dredging Corporation of India Limited	Financial Results
Eveready Industries India Limited	Financial Results
FDC Limited	Financial Results/Dividend
FSN E-Commerce Ventures Limited	Financial Results
Gala Precision Engineering Limited	Financial Results
Godrej Properties Limited	Financial Results
Harsha Engineers International Limited	Financial Results
Healthcare Global Enterprises Limited	Financial Results
Hindustan Copper Limited	Financial Results/Dividend
Hitachi Energy India Limited	Financial Results
HPL Electric & Power Limited	Financial Results
IL&FS Engineering and Construction Company Limited	Financial Results
Indian Oil Corporation Limited	Financial Results
J.Kumar Infraprojects Limited	Financial Results
JB Chemicals & Pharmaceuticals Limited	Dividend

JM Financial Limited	Financial Results
Kaynes Technology India Limited	Financial Results
KNR Constructions Limited	Financial Results
Kolte - Patil Developers Limited	Financial Results
Krsnaa Diagnostics Limited	Financial Results
Marksans Pharma Limited	Financial Results
Max Healthcare Institute Limited	Financial Results
Mazagon Dock Shipbuilders Limited	Financial Results/Dividend
Minda Corporation Limited	Financial Results/Dividend
NCC Limited	Financial Results
Nilkamal Limited	Financial Results
NRB Industrial Bearings Limited	Financial Results
OnMobile Global Limited	Financial Results
Page Industries Limited	Financial Results/Dividend
PB Fintech Limited	Fund Raising
Peninsula Land Limited	Financial Results
Physicswallah Limited	Financial Results
Pitti Engineering Limited	Financial Results
Poly Medicure Limited	Financial Results
PVR INOX Limited	Financial Results
Rail Vikas Nigam Limited	Financial Results/Dividend
Repcos Home Finance Limited	Financial Results/Dividend
Sai Life Sciences Limited	Financial Results
Shree Renuka Sugars Limited	Financial Results
SKF India Limited	Financial Results
Suraksha Diagnostic Limited	Financial Results
Suzlon Energy Limited	Financial Results
Thomas Cook (India) Limited	Financial Results
Tracxn Technologies Limited	Financial Results
Unichem Laboratories Limited	Financial Results
UNO Minda Limited	Financial Results/Dividend
Updater Services Limited	Financial Results
VA Tech Wabag Limited	Financial Results
Varroc Engineering Limited	Financial Results
Venus Pipes & Tubes Limited	Financial Results
Voltamp Transformers Limited	Financial Results
VRL Logistics Limited	Financial Results/Dividend
Xchanging Solutions Limited	Financial Results
Yatharth Hospital & Trauma Care Services Limited	Financial Results

(Source: NSE)

Corporate Actions as on 05/02/2026

GAIL (India) Limited	Interim Dividend - Rs 5 Per Share
MOIL Limited	Interim Dividend - Rs 3.53 Per Share
Cholamandalam Investment and Finance Company Limited	Interim Dividend - Rs 1.30 Per Share
Dr. Lal Path Labs Ltd.	Interim Dividend - Rs 3.50 Per Share
Nexus Select Trust	Distribution - Rs 2.367 Consisting Of Re 0.611 As Interest/ Rs 1.574 Per Unit As Dividend/ Re 0.014 Per Unit As Other Income/ Re 0.168 Per Unit As Repayment Of Spv Level Debt
Procter & Gamble Hygiene and Health Care Limited	Interim Dividend - Rs 170 Per Share/ Special Dividend - Rs 25 Per Share
Styrenix Performance Materials Limited	Interim Dividend - Rs 23 Per Share
Sun Pharmaceutical Industries Limited	Interim Dividend - Rs 11 Per Share
Wheels India Limited	Interim Dividend - Rs 5.30 Per Share

(Source: NSE)

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