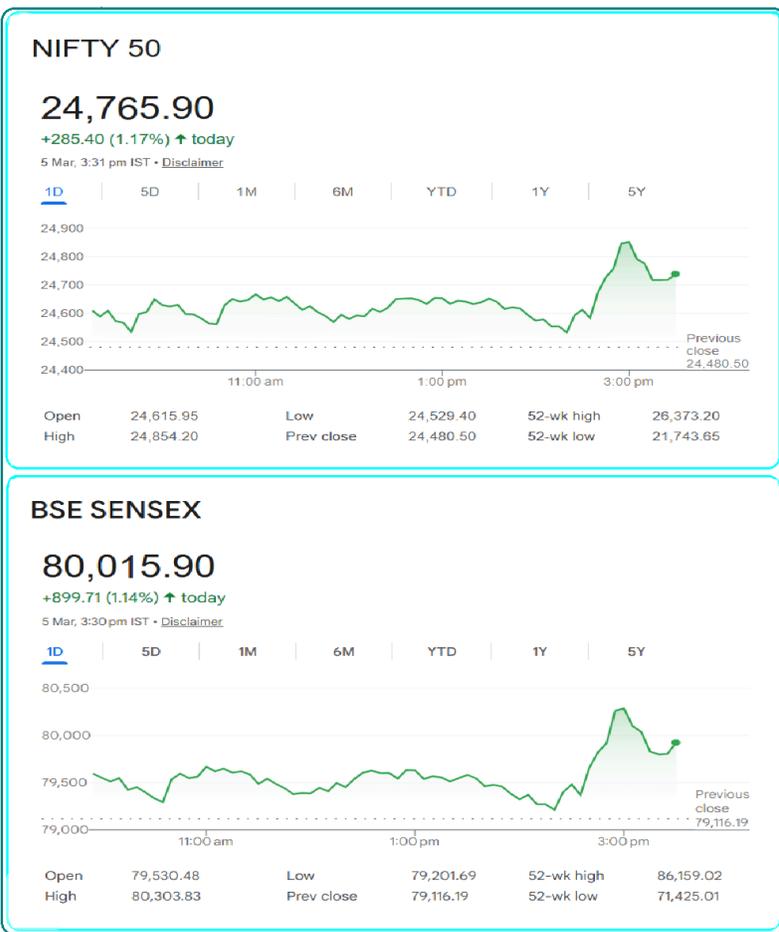


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24765.90	24480.50	1.17%
S&P BSE SENSEX	80015.90	79116.19	1.14%
NIFTY MID100	57792.55	56925.15	1.52%
NIFTY SML100	16538.80	16281.50	1.58%

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

Market Wrap Up

- The key equity benchmarks ended with strong gains today after Iran's Deputy Foreign Minister said the country is ready to abandon its nuclear program if the US fulfills certain conditions, among other factors that boosted market sentiment. This comes after stock markets witnessed a massive selloff in the previous sessions driven by geopolitical tensions. The Nifty settled above the 25,750 mark.
- The S&P BSE Sensex surged 899.71 points or 1.14% to 80,015.90. The Nifty 50 index jumped 285.40 points or 1.17% to 24,765.90.
- The BSE 150 MidCap Index added 1.44% and the BSE 250 SmallCap Index jumped 1.38%.
- Among the sectoral indices, the Nifty Metal index (up 2.29%), the Nifty Consumer Durables index (up 2.10%) and the Nifty Auto index (up 1.86%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 0.59%), the Nifty Media index (up 1.07%), and the Nifty PSU Bank index (up 0.49%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **March** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **1164** contracts at the end of the day.
- Long** position build up for the **March** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **March** series has been witnessed in **SBIN**, **ICICIBANK**, **INFY**.
- Unwinding** position for the **March** series has been witnessed in **LTM**, **OIL**, **SAIL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	59055.85	58755.25	0.51%
NIFTY AUTO	27366.80	26867.15	1.86%
NIFTY FMCG	50000.80	49797.50	0.41%
NIFTY IT	30126.80	30305.25	-0.59%
NIFTY METAL	12049.20	11779.75	2.29%
NIFTY PHARMA	23005.50	22672.20	1.47%
NIFTY REALTY	757.80	744.15	1.83%
BSE CG	69709.56	68146.84	2.29%
BSE CD	57728.81	56817.15	1.60%
BSE Oil & GAS	28302.51	27929.33	1.34%
BSE POWER	6841.71	6680.49	2.41%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	55278.06	54245.54	1.90%
HANG SENG	25321.34	25249.48	0.28%
STRAITS TIMES	4846.56	4812.75	0.70%
SHANGHAI	4108.57	4082.47	0.64%
KOSPI	5583.90	5093.54	9.63%
JAKARTA	7710.54	7577.06	1.76%
TAIWAN	33672.94	32828.88	2.57%
KLSE COMPOSITE	1713.20	1698.22	0.88%
ALL ORDINARIES	9164.90	9117.10	0.52%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	124022.64	140954.35
NSE F&O	200308.10	224747.80

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3752.52

(Source: [NSE](#))

Corporate News

- **Petronet LNG**, has issued a force majeure notice to supplier QatarEnergy and its domestic buyers after its vessels were unable to reach the Ras Laffan load port amid escalating tensions in West Asia.
- **Mangalore Refinery and Petrochemicals** has shut a crude unit and some secondary units at its 300,000-barrel-per-day refinery due to oil shortage.
- **Adani Total Gas** has significantly increased prices for industrial clients due to reduced gas availability stemming from Middle East conflict. The company cited upstream gas curtailment and operational constraints impacting LNG supply routes. Prices for gas exceeding 40% of the daily contract quantity have risen to 119 Indian rupees per standard cubic meter.
- **Hindustan Zinc Limited** has signed a memorandum of understanding (MoU) with Virginia Tech to advance research aimed at improving silver recovery across its lead-zinc concentrator operations.
- **Granules India** said that Granules Consumer Health received Establishment Inspection Report (EIR) from US Food and Drug Administration (USFDA) for its packaging facility in Virginia, USA with a no action indicated (NAI) status.
- **Great Eastern Shipping Company** contracted to buy a secondhand Kamsarmax dry bulk carrier of about 81,094 deadweight tonnage (dwt) to expand its fleet.
- **Ramky Infrastructure** signed an EPC agreement with Maharashtra Industrial Township for infrastructure works at Dighi Port Industrial Area Phase 1 under the Delhi-Mumbai Industrial Corridor. The total contract value is Rs 1,401.84 crore.
- **DEE Development Engineers** said that the company's material subsidiary, DEE Piping Systems (Thailand) Co has received a Letter of Intent (LOI) worth about Euro 1.9 million (approximately Rs 20 crore) from an international customer.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	1499.30	1434.40	4.52%
LT	4038.70	3882.60	4.02%
HINDALCO	954.95	921.80	3.60%
NTPC	378.05	365.80	3.35%
RELIANCE	1389.40	1345.00	3.30%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TECHM	1333.30	1351.20	-1.32%
HCLTECH	1354.10	1364.00	-0.73%
ICICIBANK	1357.60	1365.40	-0.57%
SBIN	1169.50	1174.50	-0.43%
TCS	2578.80	2587.80	-0.35%

(Source: [Moneycontrol](#))

- **Zaggle Prepaid Ocean Services** has announced that it has entered into an agreement with Blue Star to provide its employee expense management and benefits platform, Zaggle Save.
- **Silver Touch Technologies** said it has received a purchase order from the Odisha Computer Application Centre (OCAC), under the Government of Odisha, for the enhancement, operation, maintenance and technical support of the CM-KISAN portal.
- **Markolines Pavement Technologies** has secured multiple work orders from various clients with a cumulative value of about Rs 439.74 crore for execution of infrastructure and development projects.

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

Global News

- U.S. ADP said private sector employment climbed by 63,000 jobs in February after rising by a downwardly revised 11,000 jobs in January.
- U.S. S&P Global Composite PMI dropped to 51.9 in February from 53 in January. The services PMI fell to 51.7 in February of 2026 from 52.7 in the previous month.
- U.S. ISM said its services PMI climbed to 56.1 in February from 53.8 in January.
- Eurozone retail sales fell 0.1% month-on-month in January 2026, following an upwardly revised 0.2% gain in December 2025. On an annual basis, Eurozone retail growth accelerated to 2.0% in January from 1.8% in December.
- French industrial production rose 0.5% month-on-month in January 2026, rebounding from a 0.5% decline in December. On a yearly basis, industrial activity rose 1.9%, while on a three-month basis it increased 0.1% compared with the prior period.
- Australia's trade surplus fell to A\$2.63 billion from A\$3.37 billion in December. In the same period last year, the surplus totaled A\$4.55 billion. Exports of goods decreased 0.9% from the prior month. Imports increased 0.8% in January driven by the 46.8% surge in non-monetary gold imports.

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

Economic News

- Crude Oil traded at US\$ 77.07/bbl (IST 17:00).
- INR strengthened to Rs. 91.61 from Rs. 91.48 against each US\$ resulting in daily change of 0.60%.
- India's total vehicle sales during the last month stood at 24.09 lakh units, marking a 25.62% annual growth. Looking ahead to March, FADA estimated that dealer sentiment would remain largely positive, with 75.51% of dealers expecting growth, while 19.90% foresee a stable market and only 4.59% anticipate a decline. On an annual basis, two-wheelers recorded 17,00,505 units of sales, with a growth of 25.02%. FADA said that growth remained broad-based with urban markets rising 28.96% yoy and rural markets growing 22.16% yoy. Three-wheeler sales grew by 24.39% last month, while passenger vehicles saw a 26.12% yoy surge in demand, and commercial vehicle sales rose by 28.89%. Passenger vehicle retail sales in February stood at 3,94,768 units, with urban markets growing 21.12% yoy and rural markets growing 34.21% yoy. Tractors emerged as the fastest-growing category during the month as they continued a strong run with a sharp 36.35% growth. The construction equipment segment failed to register a fresh February record, registering a marginal decline of 1.22% yoy. Commercial vehicles recorded a sale of 1,00,820 units.
- The current global shipping crisis is hitting Indian rice exporters hard, forcing the Indian Rice Exporters Federation to call on the government for immediate support. As they grapple with a severe lack of containers, unexpected vessel cancellations, and skyrocketing shipping costs, the domestic market is feeling the squeeze with rising prices and strained cash flow.
- India and Finland are on the path to an enhanced alliance, as Prime Minister Narendra Modi and President Alexander Stubb embrace a strategic partnership tailored for the future. Their focus on digital innovation and sustainability holds promise for transformative projects in high-tech realms like AI, next-generation 6G networks, renewable energy, and quantum mechanics.
- The United States and India are on the brink of finalising a landmark trade agreement. US Deputy Secretary of State Christopher Landau confirmed that the deal is nearing completion. Once ratified, this pact promises to enhance economic relations and bolster trade opportunities for both countries, fostering closer ties and shared objectives on security issues.

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

Forthcoming Events

Board Meetings as on 06/03/2026

DCM Shriram International Limited	Financial Results
Indian Oil Corporation Limited	Dividend
Kwality Wall's (India) Limited	Financial Results
Lokesh Machines Limited	Fund Raising
Motisons Jewellers Limited	Fund Raising
R Systems International Limited	Dividend
Sun TV Network Limited	Dividend

(Source: NSE)

Corporate Actions as on 06/03/2026

Bharat Electronics Limited	Interim Dividend - Rs 1.95 Per Share
Engineers India Limited	Interim Dividend - Rs 1.50 Per Share
SBI Life Insurance Company Limited	Interim Dividend - Rs 2.70 Per Share

(Source: NSE)

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