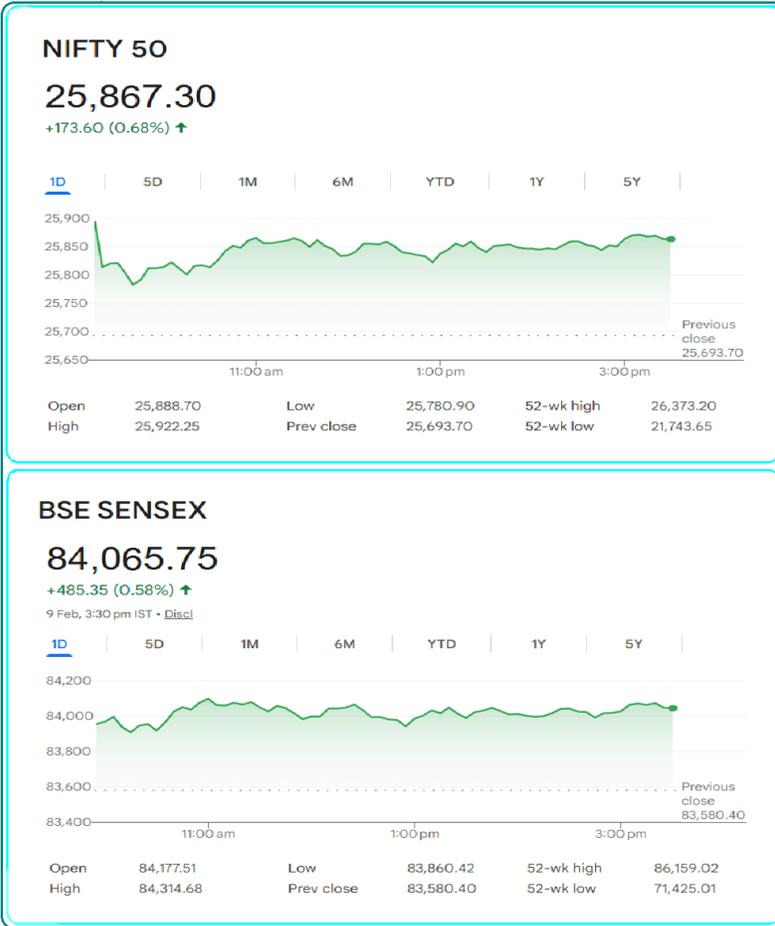


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25867.30	25693.70	0.68%
S&P BSE SENSEX	84065.75	83580.40	0.58%
NIFTY MID100	60441.15	59502.70	1.58%
NIFTY SML100	17385.90	16938.65	2.64%

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

Market Wrap Up

- The key equity benchmarks ended with significant gains, extending gains for second consecutive trading session, supported by FII buying amid optimism over the recently concluded India-US trade agreement and positive global cues. Sentiments further lifted by key agreements signed between India-Malaysia. Investors will continue to monitor developments in the ongoing Q3 earnings season. The Nifty ended above the 25,850 mark.
- The S&P BSE Sensex jumped 485.35 points or 0.58% to 84,065.75. The Nifty 50 index rallied 173.60 points or 0.68% to 25,867.30. In the two consecutive trading sessions, Sensex and Nifty jumped 0.90% and 0.88%, respectively. The BSE 150 MidCap Index climbed 1.66% and the BSE 250 SmallCap Index surged 2.45%.
- Among the sectoral indices, the Nifty Media index (up 4.37%), the Nifty Consumer Durables index (up 3.60%) and the Nifty PSU Bank index (up 3.34%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (up 0.02%), the Nifty Private Bank index (up 0.23%) and the Nifty FMCG index (up 0.32%) 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 **8810** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **RELIANCE, SBIN, BAJFINANCE, ETERNAL**.
- **Short** position build up for the **February** series has been witnessed in **BHARTIARTL, HDFCBANK, ICICIBANK, INFY**.
- **Unwinding** position for the **February** series has been witnessed in **TRENT, LTIM**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	60669.35	60120.55	0.91%
NIFTY AUTO	27791.45	27519.55	0.99%
NIFTY FMCG	52047.30	51882.75	0.32%
NIFTY IT	35616.65	35611.05	0.02%
NIFTY METAL	12129.45	11943.15	1.56%
NIFTY PHARMA	22290.70	21961.35	1.50%
NIFTY REALTY	846.35	824.85	2.61%
BSE CG	69035.42	67752.30	1.89%
BSE CD	59315.68	57719.93	2.76%
BSE Oil & GAS	29203.99	29158.70	0.16%
BSE POWER	6824.98	6812.85	0.18%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	56363.94	54253.68	3.89%
HANG SENG	27027.16	26559.95	1.76%
STRAITS TIMES	4960.83	4934.41	0.54%
SHANGHAI	4123.09	4065.58	1.41%
KOSPI	5298.04	5089.14	4.10%
JAKARTA	8031.87	7935.26	1.22%
TAIWAN	32404.62	31782.92	1.96%
KLSE COMPOSITE	1751.30	1732.83	1.07%
ALL ORDINARIES	9131.10	8954.60	1.97%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	114972.50	108655.63
NSE F&O	163418.71	176886.12

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	2254.64
NET SELL	-

(Source: [NSE](#))

Corporate News

- **State Bank of India** reported 24.49% jump in net profit to Rs 21,028 crore on a 9.69% increase in total income to Rs 1,40,915 crore in Q3 FY26 as compared with Q3 FY25. Net interest income for the period under review was Rs 45,190 crore, up 9.04% YoY.
- **Tata Steel** reported a sharp 723.14% jump in consolidated net profit to Rs 2688.70 crore on 6.4% increase in revenue from operations to Rs 56,646.05 crore in Q3 FY26 over Q3 FY25.
- **Zydu Lifesciences** posted consolidated net sales (including other operating income) has increased 30.28% to Rs 6864.5 crore. Operating profit margin has jumped from 26.33% to 26.46%, leading to 30.90% rise in operating profit to Rs 1,816.40 crore.
- **JK Tyre & Industries** posted consolidated net profit surged 294.96% to Rs 207.75 crore on a 14.95% increase in revenue from operations to Rs 4,222.96 crore in Q3 FY26 over Q3 FY25.
- **G R Infraprojects** posted standalone net profit jumped 37.70% to Rs 232.15 crore in Q3 FY26 as against Rs 168.59 crore in Q3 FY25. Revenue from operations rose 35.91% YoY to Rs 2,039.49 crore in the quarter ended 31 December 2025.
- **Mahanagar Gas** has reported 10.4% fall in standalone net profit to Rs 201.97 crore despite a 17.1% increase in net revenue to Rs 2,058.28 crore in Q3 FY26 as compared with Q3 FY25.
- **Larsen & Toubro** will add 18 megawatts of data centre capacity by March-end. This will bring their total operational data centre capacity to 32 megawatts. The company is also focusing on design-led semiconductor chips and is upgrading its indigenous electrolyser stack. These developments signal significant growth for L&T in key infrastructure sectors.
- **Bharti Airtel** is set to boost its data centre capacity to around 1 gigawatt in the coming years. This expansion aims to capture a quarter of India's data centre market. The company is shifting its investment focus towards data centres and digital services. This strategic move comes as

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SBIN	1146.00	1066.40	7.46%
SHRIRAMFIN	1062.70	1002.50	6.00%
GRASIM	2926.30	2836.90	3.15%
TITAN	4257.80	4141.00	2.82%
DRREDDY	1275.50	1241.20	2.76%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
MAXHEALTH	1010.00	1039.85	-2.87%
POWERGRID	289.75	292.75	-1.02%
ITC	322.80	325.80	-0.92%
ONGC	266.60	268.95	-0.87%
NTPC	361.90	365.05	-0.86%

(Source: [Moneycontrol](#))

- **Tata Consultancy Services** has partnered the Flight Central Travel Group to support its global digital transformation journey. Flight Centre Travel Group (FCTG) is one of the world's largest travel groups with a vast leisure and corporate travel sales network spanning Australia and New Zealand, The Americas, EMEA and Asia.
- **HCL Technologies** has achieved AWS Competencies in three categories: Supply Chain, Security and High Performance Computing (HPC). The recognitions underscore HCLTech's continued investment in building deep cloud capabilities and delivering meaningful outcomes for clients on Amazon Web Services (AWS).
- **Sun Pharma** plans a careful acquisition strategy. The company prioritizes organic growth to remain an attractive investment. Chairman Dilip Shanghvi highlighted a focus on innovative medicines in the US. Smaller acquisitions are being considered for emerging markets. The firm is also evaluating the biosimilar sector. This approach aims to strengthen long-term capabilities.

Airtel reports strong financial growth.

- **Maruti Suzuki** achieved record vehicle dispatches via railways in 2025. This initiative significantly boosted green logistics. The company transported over 5.85 lakh vehicles, a 18% year-on-year increase. Rail transport's share in outbound logistics grew to 26%. This shift cut carbon emissions and reduced oil imports. Maruti Suzuki aims for 35% rail dispatches by FY 2030-31.
- **Adani Energy Solutions** has made waves by securing a noteworthy investment from Japanese banking institutions, marking a significant leap in India's renewable energy landscape. This funding will propel the construction of a pivotal transmission network designed to channel clean energy from Rajasthan, connecting the solar-rich region of Bhadla with Fatehpur.
- **Indian Oil Corporation** has secured six million barrels of crude oil from West Africa and the Middle East. This move signals India's departure from Russian oil purchases. Refiners are avoiding Russian crude for March-April and likely beyond. IOC acquired Angolan Pazflor and Nigerian Agbami and Akpo crudes. They also bought Nigerian Bonny Light and UAE's Upper Zakum crude.
- **Indian Oil Corporation** and **Hindustan Petroleum Corporation** have jointly purchased two million barrels of Venezuelan crude oil. This significant deal was made with trader Trafigura for delivery in the latter half of April. This marks Hindustan Petroleum Corporation's first acquisition of Venezuelan oil. Indian Oil Corporation had previously bought Venezuelan oil earlier this year.
- **Titan Company** anticipates a significant surge in luxury Swiss watch sales in India due to the India-EU Free Trade Agreement, which has reduced import duties. The company expects Swiss brands to become more competitive as they pass on these benefits to consumers, driving growth in the premium segment.
- **Axiscades Technologies**'s subsidiary, Mistral Solutions, secured a domestic supply order worth around Rs 80 crore from Hindustan Aeronautics (HAL).

- **Bondada Engineering** has successfully commissioned 69.51 MWp of solar power projects executed for Paradigm IT, MAHAGENCO, and NLC India, spanning multiple locations across Hingoli, Achalpur, Bhusawal, and Vajiapur in Maharashtra, as well as Neyveli in Tamil Nadu during January 2026.
- **Thomas Cook India** and SOTC Travel have joined forces with Mauritius Tourism Promotion Authority. This collaboration aims to increase awareness of Mauritius across India. The partnership will focus on developing new travel products and marketing efforts.
- **Intellect Design Arena** announced a partnership with DUCA Financial Services Credit Union (DUCA) to transform its digital banking ecosystem. By adopting Intellect's eMACH.ai Digital Engagement Platform (DEP), DUCA joins a growing group of Canadian credit unions spearheading hyper-personalised, friction-free banking tailored to the evolving needs of their members. This announcement follows Intellect's previous update on December 15, 2025, in which 35 credit unions selected Intellect's eMACH.ai DEP.

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

Global News

- China's foreign exchange reserves increased by USD 41.2 billion to USD 3.399 trillion in January 2026, up from USD 3.358 trillion in December 2025.
- U.S. consumer sentiment index reached its highest level since hitting 58.2 in August 2025.
- US.. total consumer credit rose by \$24.05 billion in December 2025, following an upwardly revised \$4.70 billion gain in November.
- Eurozone Sentix investor confidence index rose to 4.2 in February from -1.8 in January.
- Japan posted a current account surplus of 728.8 billion yen in December, following the 3.674 trillion yen surplus in November.

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

Economic News

- Crude Oil traded at US\$ 63.80/bbl (IST 17:00).
- INR weakened to Rs. 90.78 from Rs. 90.67 against each US\$ resulting in daily change of 0.12%.
- India's economy is set for strong growth, projected at 6.4% by Moody's for fiscal 2026-27. This makes it the fastest among G-20 nations. Steady domestic demand and investment will drive this expansion. Financial stability and credit demand are expected to remain robust. Banks will maintain healthy capital buffers. Deposit growth will match loan demand. Retail credit will be stable.
- India and Seychelles have inked a \$175 million economic package, bolstering projects in housing, e-mobility, health, and maritime security. Multiple MoUs were signed, including one for training Seychelles civil servants in India. Prime Minister

Modi highlighted the strong people-to-people ties and shared vision, emphasizing development partnerships built on Seychelles' priorities.

- India has approved a limited import of dried distillers' grains with solubles. This move allows for 5 lakh tonnes of DDGS, just one percent of total consumption. The imports will boost animal feed supply and help meet growing demand. This measure aims to reduce the need for corn and soybean imports.
- A joint panel will be formed by the corporate affairs ministry and CBDT by March-end. This initiative aims to align tax computation rules with accounting standards. The move will reduce compliance burdens for Indian companies. It also seeks to minimize litigation arising from differences between accounting and tax frameworks.
- India's final OTT accessibility guidelines offer streaming services a longer transition period, easing earlier strict obligations. Platforms now have 36 months to implement accessibility features for new content, with legacy catalogues addressed on a best-effort basis. The government has also refined the grievance redressal mechanism and clarified exemptions.
- India will offer zero-duty access to American motorcycle manufacturers for bikes with engines of 800cc and above. This move is part of an interim trade pact with the US, expected by mid-March. The agreement also includes duty concessions on US cars. The US will reciprocate by removing tariffs on some Indian auto parts.

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

Forthcoming Events

Board Meetings as on 10/02/2026

Apollo Hospitals Enterprise Limited	Financial Results/Dividend
Britannia Industries Limited	Financial Results
Titan Company Limited	Financial Results
Escorts Kubota Limited	Financial Results/Dividend
Grasim Industries Limited	Financial Results
63 moons technologies limited	Financial Results
Allcargo Terminals Limited	Financial Results
ARSS Infrastructure Projects Limited	Financial Results
Arvind SmartSpaces Limited	Financial Results
Ashiana Housing Limited	Financial Results/Dividend
Balrampur Chini Mills Limited	Financial Results
Bharat Gears Limited	Financial Results
Bliss GVS Pharma Limited	Financial Results/Dividend
Chambal Fertilizers & Chemicals Limited	Financial Results
Dharmaj Crop Guard Limited	Financial Results
Dhunseri Tea & Industries Limited	Financial Results
Dilip Buildcon Limited	Financial Results
Edelweiss Financial Services Limited	Financial Results

Eicher Motors Limited	Financial Results
Eldeco Housing And Industries Limited	Financial Results
Entertainment Network (India) Limited	Financial Results
Esab India Limited	Financial Results/Dividend
Federal-Mogul Goetze (India) Limited.	Financial Results
Finolex Cables Limited	Financial Results
Gandhi Special Tubes Limited	Financial Results
Gayatri Highways Limited	Financial Results
GRP Limited	Financial Results
GTL Infrastructure Limited	Financial Results
Gujarat Narmada Valley Fertilizers and Chemicals Limited	Financial Results
Gujarat Pipavav Port Limited	Financial Results
Gulshan Polyols Limited	Financial Results
HEG Limited	Financial Results
Hinduja Global Solutions Limited	Financial Results
Hindustan Foods Limited	Financial Results
Hitech Corporation Limited	Financial Results
HLE Glascoat Limited	Financial Results
Huhtamaki India Limited	Financial Results/Dividend
IIFL Capital Services Limited	Financial Results/Dividend
India Glycols Limited	Financial Results
Jayshree Tea & Industries Limited	Financial Results
JHS Svendgaard Laboratories Limited	Financial Results
Jubilant Foodworks Limited	Financial Results
Jyoti CNC Automation Limited	Financial Results
Kewal Kiran Clothing Limited	Financial Results/Dividend
Khadim India Limited	Financial Results
Kiri Industries Limited	Financial Results
Landmark Cars Limited	Financial Results
Laxmi Dental Limited	Financial Results
Lumax Industries Limited	Financial Results
Macpower CNC Machines Limited	Financial Results
Max India Limited	Financial Results
Morepen Laboratories Limited	Financial Results
NLC India Limited	Financial Results
Nucleus Software Exports Limited	Financial Results
Oil India Limited	Financial Results/Dividend
Popular Vehicles and Services Limited	Financial Results
Power Mech Projects Limited	Financial Results
Precot Limited	Financial Results
Rico Auto Industries Limited	Financial Results
Safari Industries (India) Limited	Financial Results/Fund Raising
Samvardhana Motherson International Limited	Financial Results

Shankara Building Products Limited	Financial Results
Sical Logistics Limited	Fund Raising
Som Distilleries & Breweries Limited	Financial Results
Speciality Restaurants Limited	Financial Results
Subex Limited	Financial Results
Techno Electric & Engineering Company Limited	Financial Results
Tera Software Limited	Financial Results
Texmo Pipes and Products Limited	Financial Results
The Karnataka Bank Limited	Financial Results
Tirupati Forge Limited	Financial Results
Torrent Power Limited	Financial Results/Dividend/Fund Raising
TVS Supply Chain Solutions Limited	Financial Results
United Breweries Limited	Financial Results
Wockhardt Limited	Financial Results
Zee Learn Limited	Financial Results
ZF Commercial Vehicle Control Systems India Limited	Financial Results

(Source: NSE)

Corporate Actions as on 10/02/2026

Apollo Tyres Limited	Interim Dividend - Rs 3.50 Per Share
BMW Ventures Limited	Interim Dividend - Rs 1.50 Per Share
CCL Products (India) Limited	Interim Dividend - Rs 2.75 Per Share
Emami Limited	Interim Dividend - Rs 6 Per Share
Jubilant Ingrevia Limited	Interim Dividend - Rs 2.50 Per Share
NHPC Limited	Interim Dividend - Rs 1.40 Per Share
RITES Limited	Interim Dividend - Rs 1.90 Per Share
Transport Corporation of India Limited	Interim Dividend - Rs 9 Per Share
Tube Investments of India Limited	Interim Dividend - Rs 2 Per Share

(Source: NSE)

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