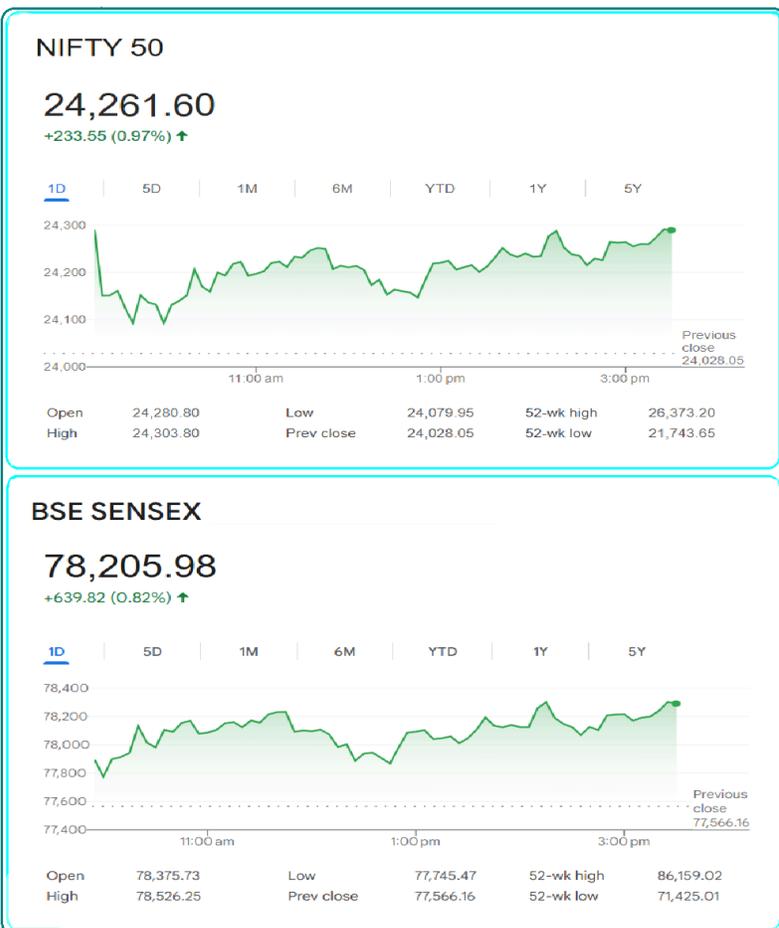


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24261.60	24028.05	0.97%
S&P BSE SENSEX	78205.98	77566.16	0.82%
NIFTY MID100	57177.65	56265.50	1.62%
NIFTY SML100	16473.80	16132.20	2.12%

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

Market Wrap Up

- The key equity benchmarks ended with major gains, snapping a two-day losing streak. The rally was driven by improved investor sentiment after comments from U.S. President Donald Trump suggesting possible easing of tensions in the Iran conflict, which triggered a sharp decline in crude oil prices. Positive global cues and bargain buying following the recent sell-off also supported the market recovery. The Nifty ended above the 24,250 mark. The S&P BSE Sensex advanced 639.82 points or 0.82% to 78,205.98. The Nifty 50 index rallied 233.55 points or 0.97% to 24,261.60. In the past two consecutive trading sessions, the Sensex dropped 3.06% while the Nifty fell 2.97%. The S&P BSE Mid-Cap index surged 1.66% and the S&P BSE Small-Cap index soared 2.04%. Among the sectoral indices, the Nifty Auto index (up 3.10%), the Nifty Consumer Durables Bank index (up 2.67%) and the Nifty PSU Bank index (up 2.21%) index (up 0.84%) outperformed the Nifty 50 index. Meanwhile the Nifty Oil & Gas index (down 0.39%), the Nifty IT index (down 0.46%) and the Nifty FMCG index (up 0.84%) 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 **6546** contracts at the end of the day.
- Long** position build up for the **March** series has been witnessed in **SBIN, ICICIBANK, HDFCBANK, BAJFINANCE**.
- Short** position build up for the **March** series has been witnessed in **RELIANCE, ONGC, BHARTIARTL, INFY**.
- Unwinding** position for the **March** series has been witnessed in **TMPV, CDSL, OIL, TATATECH**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	56950.80	56019.80	1.66%
NIFTY AUTO	26770.55	25965.95	3.10%
NIFTY FMCG	49603.55	49192.40	0.84%
NIFTY IT	30024.00	30162.05	-0.46%
NIFTY METAL	11868.50	11688.80	1.54%
NIFTY PHARMA	23253.65	22933.75	1.39%
NIFTY REALTY	744.15	732.80	1.55%
BSE CG	70054.29	69098.31	1.38%
BSE CD	57295.47	55843.80	2.60%
BSE Oil & GAS	27229.62	27286.37	-0.21%
BSE POWER	6881.90	6776.47	1.56%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	54248.39	52728.72	2.88%
HANG SENG	25959.90	25408.46	2.17%
STRAITS TIMES	4860.64	4756.61	2.19%
SHANGHAI	4123.14	4096.60	0.65%
KOSPI	5532.59	5251.87	5.35%
JAKARTA	7440.91	7337.37	1.41%
TAIWAN	32771.87	32110.42	2.06%
KLSE COMPOSITE	1701.68	1674.17	1.64%
ALL ORDINARIES	8924.20	8823.60	1.14%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	114279.83	116595.57
NSE F&O	220871.66	264340.52

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	4672.64

(Source: [NSE](#))

Corporate News

- **ABB India** announced plans to invest about \$75 million in India to expand manufacturing and R&D for critical segments.
- **NTPC Green Energy** announced the commercial operation of the remaining 91.6 MW capacity of its 250 MW solar PV project in Kadapa district, Andhra Pradesh.
- **State Bank of India** is not willing to process payments for Russian oil even after the US government issued a temporary waiver for India's imports, as the country's largest lender is uncertain how long the concession will last.
- **Emami Agrotech** has launched the "Healthy & Tasty - FOR CHEF" range at AAHAR 2026 in New Delhi, targeting the hotel, restaurant and catering (HoReCa) and B2B foodservice segment. The company aims to build a strong presence in this market and targets ₹2,000 crore revenue from the HoReCa business within two to three years.
- **United Drilling Tools** said it has secured a significant order from Oil and Natural Gas Corporation (ONGC) for the supply of Large Outer Diameter (OD) casing pipes, valued at Rs 3.73 crore.
- **Interarch Building Solutions** secured an order worth about Rs 44 crore from a domestic customer for the design, engineering, manufacturing, supply and erection of a pre-engineered steel building system.
- **BMW Ventures** securing a domestic order worth Rs 15.91 crore for the supply, fabrication, delivery, and erection of fabricated steel structures.
- **Bajel Projects** announced the signing of a collaboration agreement with National Investment and Infrastructure Fund (NIIF), a sovereign-linked alternative asset manager anchored by the Government of India and AnantGrid, a power transmission developer promoted by NIIF.
- **Trac Precision Solutions** (Trac), part of the **PTC Industries Group**, has signed a multi-year Memorandum of Understanding (MoU) with Coolbrook Oy, a transformational technology and engineering company, to collaborate on the machining and manufacture of components for Coolbrook's RotoDynamic Heater™

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	1062.90	987.20	7.67%
TMPV	345.20	332.00	3.98%
EICHERMOT	7536.50	7266.00	3.72%
INDIGO	4380.40	4236.70	3.39%
M&M	3293.70	3187.60	3.33%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1295.60	1315.00	-1.48%
ETERNAL	226.62	229.56	-1.28%
RELIANCE	1408.80	1424.00	-1.07%
BHARTIARTL	1850.40	1866.70	-0.87%
ONGC	269.20	270.80	-0.59%

(Source: [Moneycontrol](#))

- **Mahindra & Mahindra** reported a 13.13% increase in production to 94,550 units in February 2026, compared with 83,575 units in February 2025.

Global News

- China's trade surplus stood at USD 213.62 billion in the first two months of 2026, following a record surplus of USD 1.189 trillion in 2025. Exports surged 21.8% yoy to USD 656.58 billion, accelerating sharply from a 6.6% rise in December while imports climbed 19.8% to USD 442.96 billion, quickening from 5.7% in December.
- Germany's trade surplus widened to EUR 21.2 billion in January 2026 from EUR 15.9 billion in the same month a year earlier. Exports fell 2.3% month-on-month to EUR 130.5 billion while imports dropped more sharply, falling 5.9% month-on-month to a seventeen-month low of €109.2 billion.
- France's trade deficit narrowed sharply to EUR 1.8 billion in January 2026, from a revised EUR 4.3 billion in December. Exports rose 0.7% month-on-month to EUR 53.4 billion while imports fell 3.6% to EUR 55.3 billion.
- Japan's GDP grew 0.3% qoq in Q4 2025, higher than the flash estimate of 0.1%, the reading followed a 0.7% contraction in Q3. The economy advanced at an annualized pace of 1.3% in Q4 2025, much stronger than the initial estimate of a 0.2% expansion.

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

(RDH™) technology.

- **Bharti Airtel** announced the expansion of its network footprint to Marwah - a geographically remote area linking Kishtwar and Anantnag in Jammu & Kashmir. With this milestone deployment, Airtel has become the first and only service provider to deliver reliable mobile connectivity to this strategically significant and difficult-to-reach region.
- **Solex Energy** said its solar module manufacturing capacity of 3.78 GW has been enlisted under the Approved List of Models and Manufacturers issued by the Ministry of New and Renewable Energy.
- **PTC Industries** said that Trac Precision Solutions has signed a multi-year memorandum of understanding (MoU) with Coolbrook Oy to collaborate on the machining and manufacture of components for Coolbrook's RotoDynamic Heater (RDH) technology.
- Minda Corporation's subsidiary, Spark Minda Green Mobility Systems signed a joint venture agreement with Turntide Drives.

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

Economic News

- Crude Oil traded at US\$ 87.70/bbl (IST 17:00).
- INR strengthened to Rs. 91.82 from Rs. 92.35 against each US\$ resulting in daily change of 0.57%.
- India could face an additional foreign currency outflow of USD 7-8 billion per month due to the surge in international energy prices, following the conflict in West Asia, raising concerns over inflation and the current account deficit. While crude oil prices have risen from USD 66 per barrel, before the US and Israel attacked Iran and Tehran retaliated, to around USD 120, liquefied natural gas (LNG) rates have more than doubled to USD 24-25 per million British thermal unit.
- The government has eased Foreign Direct Investment (FDI) regulations for countries sharing land borders with India, including China. This move relaxes the stringent rules implemented in 2020 under Press Note 3, which required prior government approval for investments from these nations. The Cabinet also approved amendments to the IBC Bill 2025 and the Corporate Laws Amendment Bill.
- India's agricultural exports are expected to reach \$55 billion in 2025, Commerce Minister Piyush Goyal said. He also said India will not allow tariff concessions on sugar imports under any trade deal.

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

Forthcoming Events

Board Meetings as on 11/03/2026

5Paisa Capital Limited	Fund Raising
Krishna Institute of Medical Sciences Limited	Fund Raising
Maha Rashtra Apex Corporation Limited	Fund Raising
Simbhaoli Sugars Limited	Financial Results
Vardhman Polytex Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 11/03/2026

Balmer Lawrie & Company Limited	Interim Dividend - Rs 4.25 Per Share
SBI Cards and Payment Services Limited	Interim Dividend - Rs 2.50 Per Share
Mangalore Refinery and Petrochemicals Limited	Interim Dividend - Rs 4 Per Share
Prabha Energy Limited	Rights 5:14 @ Premium Rs 143/-

(Source: NSE)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |