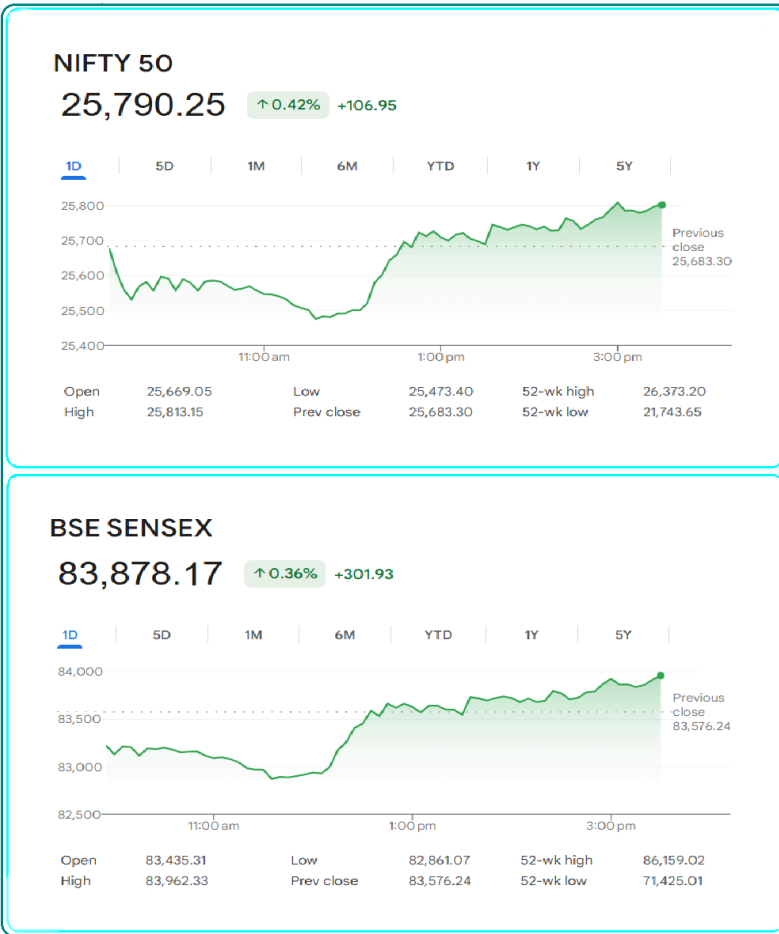


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25790.25	25683.30	0.42%
S&P BSE SENSEX	83878.17	83576.24	0.36%
NIFTY MID100	59717.10	59748.15	-0.05%
NIFTY SML100	17193.30	17282.65	-0.52%

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

Market Wrap Up

- The key equity barometers ended with decent gains today, snapping a five-day losing streak, aided by positive global cues and encouraging remarks by US Ambassador to India Sergio Gor. The market rebounded from oversold levels, with buying momentum picking up in the afternoon session. Investors are expected to continue tracking developments on the India-US trade deal, Q3 earnings announcements, and geopolitical developments. The Nifty settled above the 25,750 mark after touching an intraday low of 25,473.40 in early afternoon trade. The S&P BSE Sensex advanced 301.93 points or 0.36% to 83,878.17. The Nifty 50 index gained 106.95 points or 0.42% to 25,790.25. In the past five consecutive trading sessions, the Sensex declined 2.54% while the Nifty fell 2.45%. The S&P BSE Mid-Cap index declined 0.41% and the S&P BSE Small-Cap index fell 0.68%. Among the sectoral indices, the Nifty Metal index (up 1.99%), the Nifty PSU Bank index (up 0.65%) and the Nifty Oil & Gas index (up 0.54%) outperformed the Nifty 50 index. Meanwhile, the Nifty Media index (down 1.55%), the Nifty Realty index (down 1.22%) and the Nifty Pharma index (down 0.41%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **January** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **4498** contracts at the end of the day.
- Long** position build up for the **January** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK**.
- Short** position build up for the **January** series has been witnessed in **HDFCBANK, INFY, BAJFINANCE, ETERNAL**.
- Unwinding** position for the **January** series has been witnessed in **ITC, COALINDIA**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	59450.50	59251.55	0.34%
NIFTY AUTO	28011.75	28087.65	-0.27%
NIFTY FMCG	52745.50	52438.15	0.59%
NIFTY IT	37988.25	38027.20	-0.10%
NIFTY METAL	11315.75	11094.80	1.99%
NIFTY PHARMA	22668.45	22761.00	-0.41%
NIFTY REALTY	863.30	874.00	-1.22%
BSE CG	65047.92	65582.69	-0.82%
BSE CD	61832.88	61498.07	0.54%
BSE Oil & GAS	27435.87	27263.77	0.63%
BSE POWER	6336.11	6358.94	-0.36%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	51939.89	-
HANG SENG	26608.48	26231.79	1.44%
STRAITS TIMES	4766.78	4744.66	0.47%
SHANGHAI	4165.29	4120.43	1.09%
KOSPI	4624.79	4586.32	0.84%
JAKARTA	8884.72	8936.75	-0.58%
TAIWAN	30567.29	30288.96	0.92%
KLSE COMPOSITE	1695.44	1686.54	0.53%
ALL ORDINARIES	9092.70	9045.90	0.52%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	103691.69	106746.84
NSE F&O	209064.45	193718.31

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3638.40

(Source: [NSE](#))

Corporate News

- TCS** consolidated net profit for Q3 FY26 fell 14% on-year to Rs 10,657 crore. Revenue for the quarter rose 5% year-on-year to Rs 67,087 crore. The board declared a dividend of Rs 57 per share, including a special dividend of Rs 46 per share.
- Avenue Supermarts** (Dmart) posted consolidated net profit rallied 18.26% to Rs 855.92 crore in Q3 FY26 as against Rs 723.72 crore in Q3 FY25. Revenue from operations rose 13.32% to Rs 18,100.88 crore in Q3 FY26 as against Rs 15,972.55 crore in Q3 FY26.
- Reliance Industries** affirms its battery storage manufacturing plans are on track. The company denies reports of pausing lithium-ion cell production in India. Discussions for Chinese technology licensing have reportedly stalled. Reliance continues to build a world-leading battery storage ecosystem.
- Larsen & Toubro** is set to take full control of L&T Sapura Shipping by acquiring the final 40% stake in a deal valued at over Rs. 1,200 crore. This strategic move, anticipated to finalize by early 2026, aims to bolster L&T's offshore construction prowess, paving the way for enhanced operational flexibility in future maritime projects.
- Maruti Suzuki India** has partnered with Indian Oil Corporation to offer vehicle service facilities at select fuel stations nationwide. This collaboration aims to enhance customer convenience by providing routine maintenance and minor repairs at accessible locations, expanding Maruti Suzuki's extensive service network and integrating automotive care with energy services.
- Maruti Suzuki** will invest Rs 4,960 crore to buy land in Gujarat. This move will boost vehicle production capacity by up to one million vehicles annually. The company's current factories are operating at full capacity. This expansion is driven by growing market demand and exports. The investment will be funded through internal accruals and external borrowings.
- Biocon's** arm, Biocon Pharma Ltd, has secured USFDA approval for its generic Everolimus tablets. This medication aids in treating tuberous sclerosis complex, a rare genetic disorder causing tumors. The approval for 2mg, 3mg, and 5mg strengths bolsters Biocon's drug

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	432.30	418.35	3.33%
TATASTEEL	183.24	178.40	2.71%
ASIANPAINT	2896.40	2825.50	2.51%
HINDALCO	920.15	900.95	2.13%
TRENT	4056.40	3972.90	2.10%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	1595.90	1614.10	-1.13%
TMPV	350.55	354.15	-1.02%
EICHERMOT	7436.00	7507.00	-0.95%
BAJFINANCE	951.90	959.60	-0.80%
BAJAJ-AUTO	9491.00	9562.50	-0.75%

(Source: [Moneycontrol](#))

- Leading industrialists have announced significant investment commitments in Gujarat. **Reliance Industries** will invest Rs 7 lakh crore over five years, focusing on green energy and technology. **Adani** Group plans Rs 1.50 lakh crore in Mundra for energy projects. Other companies will also invest in manufacturing and skill development.
- GAIL India Limited** is participating in the NonStopZindagi campaign. This initiative promotes Piped Natural Gas and Compressed Natural Gas across India. The campaign aims to increase natural gas usage by 2030. It highlights benefits like safety and cost savings. The drive will use digital and on-ground methods to reach consumers.
- NTPC** is establishing a significant coal-to-synthetic natural gas facility in Chhattisgarh. This ambitious project, with an investment of approximately Rs 10,000 crore, aims to produce synthetic natural gas from high-ash Indian coal. The facility will be located at Talaipalli and is expected to consume substantial amounts of coal. Technology tie-ups are underway to finalize the project's processes.

offerings, providing a new treatment option for adult and pediatric patients with specific TSC-related conditions.

- CuraTeQ Biologics**, a part of **Aurobindo Pharma**, has secured a crucial approval from Health Canada for its biosimilar drug Dyruppeg. This medication helps cancer patients with low neutrophil counts. The approval confirms Dyruppeg's high similarity to an existing reference biologic drug. Earlier, Dyruppeg also gained marketing authorization in the European Union and the UK.
- Alembic Pharmaceuticals** has secured tentative approval from the USFDA for its Bosutinib tablets. These tablets are used to treat certain types of cancer, specifically chronic myelogenous leukemia. The approval covers the 400 mg strength. This development marks a significant step for Alembic in the US market. The company previously received final approval for other strengths of the same drug.
- Mahindra & Mahindra** reported a 25.41% increase in production to 68,992 units in December 2025, compared with 55,015 units in December 2024.
- Shakti Pumps India** received letter of award (LoA) for setting up 16,780 stand-alone off-grid DC solar photovoltaic water pumping systems (SPWPS) pumps in Karnataka.
- KP Green Engineering Ltd** Capital has received advance work orders worth Rs. 819 crore from Bharat Sanchar Nigam Limited for telecom infrastructure works under the government's 4G Saturation Project.
- Aurionpro Solutions Limited** announced that it has received a new order from Delhi Metro Rail Corporation (DMRC) Limited. The business announced that the aggregate value of this multi-year contract is Rs. 150 Crore.
- Man Industries (India)** has secured domestic and international orders aggregating Rs 550 crore for the supply of various types of pipes.

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

Global News

- U.S. non-farm payroll employment rose by 50,000 jobs in December after climbing by a downwardly revised 56,000 jobs in November. The unemployment rate edged down to 4.4% in December from a revised 4.5% in November.
- U.S. housing starts plunged by 4.6% to an annual rate of 1.246 million in October after jumping by 1.2% to an annual rate of 1.306 million in September. Building permits dipped by 0.2% to an annual rate of 1.412 million in October after surging by 6.4% to an annual rate of 1.415 million in September.
- U.S. consumer sentiment index rose to 54.0 in January after climbing to 52.9 in December.
- Eurozone Sentix investor confidence rose more-than-expected to -1.8 in January from -6.2 in December.

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

Economic News

- Crude Oil traded at US\$ 58.54/bbl (IST 17:00).
- INR strengthened to Rs. 90.17 from Rs. 90.18 against each US\$ resulting in daily change of 0.01%.
- India's consumer price inflation climbed to 1.33% in December from 0.71% in November. On a monthly basis, consumer prices edged up 0.05%.
- India is nearing a trade agreement with the European Union. Talks are also underway for a trade deal with the United States. These developments signal significant progress in India's international trade relations. The India-EU agreement aims for completion soon. The European Union is India's largest trading partner in goods. This indicates a strengthening economic partnership.
- The Centre has released over Rs. 83,000 crore to states for capital investment. This is part of the special assistance scheme for capital investment. The government is confident of fully utilizing the allocation by the fiscal year end. The scheme provides interest-free loans to states for capital expenditure.
- India is poised to meet its fiscal deficit target of 4.4% of GDP for FY26. Experts suggest the government may even surpass this goal, sending a positive message to international investors about fiscal discipline. Despite a revised nominal GDP growth forecast, absolute figures align with budget estimates. This achievement is expected to bolster confidence in India's economic management.

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

Forthcoming Events

Board Meetings as on 13/01/2026

Tata Elxsi Limited	Financial Results
ICICI Lombard General Insurance Company Limited	Financial Results
ICICI Prudential Life Insurance Company Limited	Financial Results
Bank of Maharashtra	Financial Results/Dividend
Just Dial Limited	Financial Results
5Paisa Capital Limited	Financial Results
Housing Development and Infrastructure Limited	Financial Results
Infomedia Press Limited	Financial Results
Navkar Corporation Limited	Financial Results
Oriental Hotels Limited	Financial Results
B.A.G Films and Media Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 13/01/2026

Authum Investment & Infrastructure Limited	Bonus 4:1
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(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 |