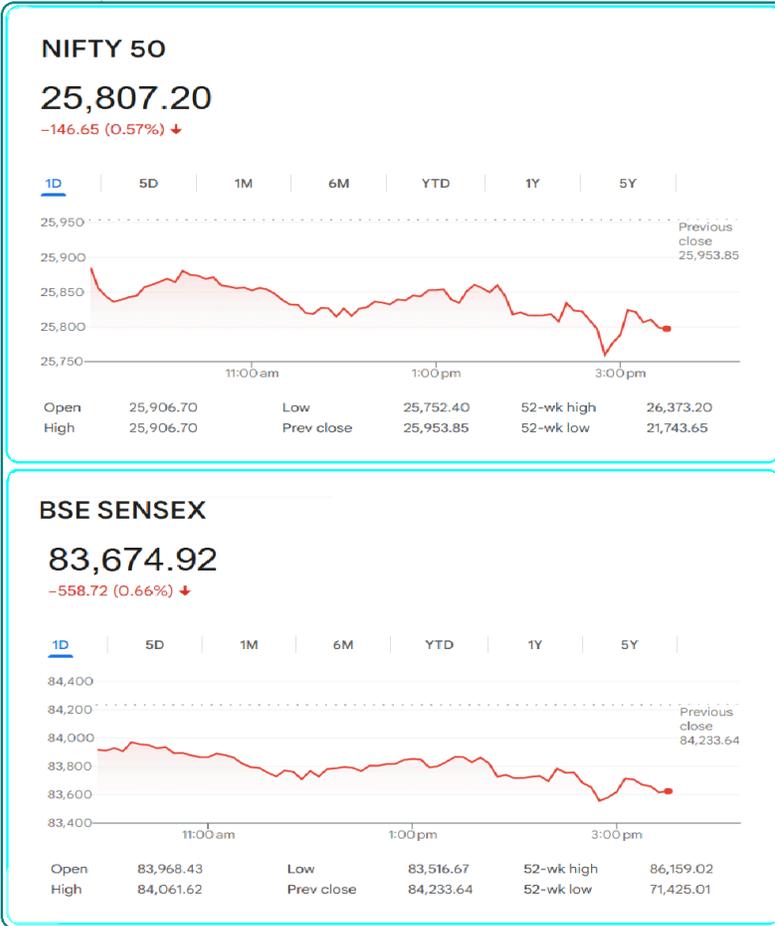


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25807.20	25953.85	-0.57%
S&P BSE SENSEX	83674.92	84233.64	-0.66%
NIFTY MID100	60470.85	60754.55	-0.47%
NIFTY SML100	17344.10	17455.00	-0.64%

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

Market Wrap Up

- The key equity benchmarks ended with major losses, weighed down by profit booking in IT stocks intensified on worries about artificial intelligence-led disruption and fragile global macro outlook. Sentiment further dented due to expiry of BSE derivatives contracts and FII selling, prompting a shift toward a risk-off stance. The Nifty closed near the 25,800 level after hitting an intraday low of 25,752.40 in the final leg of trade.
- The S&P BSE Sensex declined 558.72 points or 0.66% to 83,674.92. The Nifty 50 index fell 146.65 points or 0.57% to 25,807.20.
- The BSE 150 MidCap Index dropped 0.46% and the BSE 250 SmallCap Index slipped 0.86%.
- Among the sectoral indices, the Nifty Consumer Durables index (up 0.40%), the Nifty Financial Services index (up 0.38%) and the Nifty Metal index (up 0.02%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 5.51%), the Nifty Realty index (down 1.45%) and the Nifty Media index (down 1.31%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **February** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **7036** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **LT, BHARTIARTL, SBIN, ICICIBANK, BAJFINANCE**.
- **Short** position build up for the **February** series has been witnessed in **RELIANCE, HDFCBANK, INFY**.
- **Unwinding** position for the **February** series has been witnessed in **ZYDUSLIFE, TITAN, TMPV**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	60739.75	60745.35	-0.01%
NIFTY AUTO	28504.05	28538.70	-0.12%
NIFTY FMCG	51885.75	52152.10	-0.51%
NIFTY IT	33160.20	35095.15	-5.51%
NIFTY METAL	12279.20	12276.55	0.02%
NIFTY PHARMA	22386.30	22434.20	-0.21%
NIFTY REALTY	842.35	854.75	-1.45%
BSE CG	69045.33	68997.95	0.07%
BSE CD	59753.54	59374.23	0.64%
BSE Oil & GAS	29136.24	29485.39	-1.18%
BSE POWER	6840.00	6851.54	-0.17%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	57639.84	57650.54	-0.02%
HANG SENG	27032.54	27266.38	-0.86%
STRAITS TIMES	5016.76	4984.54	0.65%
SHANGHAI	4134.02	4131.98	0.05%
KOSPI	5522.27	5354.49	3.13%
JAKARTA	8265.35	8290.97	-0.31%
TAIWAN	33605.71	33605.71	-
KLSE COMPOSITE	1750.85	1756.39	-0.32%
ALL ORDINARIES	9281.80	9281.80	-

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	119233.39	112625.73
NSE F&O	152243.27	149936.78

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	108.42
NET SELL	-

(Source: [NSE](#))

Corporate News

- Hindustan Unilever** reported a standalone net profit of Rs 7,075 crore for the October-December quarter of the ongoing financial year 2026. This marks a 136% year-on-year increase from the Rs 3,001 crore net profit reported in the same quarter of the previous financial year. Consolidated underlying sales and volume growth stood at 5% and 4% respectively. Revenue from operations meanwhile rose more than 4% YoY to Rs 15,805 crore during Q3 FY26, from Rs 15,146 crore in Q3 FY25.
- Hindustan Aeronautics Limited** reported a nearly 30% year-on-year rise in its consolidated net profit to Rs 1,866.7 crore for the October-December quarter of FY26. Revenue from operations increased 10.7% on-year to Rs 7,698.8 crore in the quarter, compared with Rs 6,957.3 crore in the corresponding period last year.
- Hindustan Unilever Limited** is acquiring full ownership of OZiva for Rs 824 crore. This move aims to boost growth in the health and wellness sector. HUL also divested its minority stake in Wellbeing Nutrition to USV Private Limited for Rs307 crore. These strategic decisions underscore HUL's commitment to scaling purpose-led brands.
- GE Power India** reported a consolidated net profit of Rs 72.32 crore in Q3 FY26 as against a net loss of Rs 18.58 crore in Q3 FY25. Total income rose by 16.5% year on year (YoY) to Rs 401.25 crore in the third quarter of FY26.
- Bharat Forge** reported consolidated net profit rallied 28.21% to Rs 272.80 crore in Q3 FY26 as against Rs 212.78 crore posted in Q3 FY25. Revenue from operations soared 24.96% YoY to Rs 4,342.93 crore in the quarter ended 31 December 2025.
- Natco Pharma** posted consolidated net profit rose 13.91% to Rs 151.50 crore in the quarter ended December 2025 as against Rs 133.00 crore during the previous quarter ended December 2024. Sales rose 36.33% to Rs 647.30 crore in the quarter ended December 2025 as against Rs 474.80 crore during the previous quarter ended December 2024.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BAJFINANCE	999.10	968.95	3.11%
SHRIRAMFIN	1082.80	1056.80	2.46%
EICHERMOT	7943.00	7771.00	2.21%
ICICIBANK	1430.00	1406.10	1.70%
TRENT	4285.60	4218.90	1.58%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TECHM	1536.60	1634.40	-5.98%
INFY	1386.00	1471.90	-5.84%
TCS	2750.10	2909.80	-5.49%
HCLTECH	1476.10	1551.60	-4.87%
WIPRO	219.08	229.81	-4.67%

(Source: [Moneycontrol](#))

- **Godrej Industries** reported a consolidated net profit of Rs 205 crore for Q3 FY26, marking a 9% YoY rise from the Rs 188 crore net profit reported in Q3 FY25. The firm's revenue from operations grew 5% YoY to Rs 5,051.19 crore during the quarter under review.
- **Hindustan Unilever** has divested its 19.8% stake in Wellbeing Nutrition to UVS Pharma for Rs 307 crore. This move comes after HUL's initial Rs 70 crore investment in 2022. The transaction, expected to conclude by March 2026, sees Wellbeing Nutrition valued at approximately Rs 1,600 crore.
- **Mahindra & Mahindra** is investing Rs 196 crore to expand its Chennai research facility. This expansion will boost capabilities in advanced vehicle design and future technology. The upgraded facility will support next-generation vehicle platforms. This move reinforces India's role in global automotive innovation and product engineering. The new infrastructure is expected to be operational this year.
- **Ashok Leyland** is giving a big push to its international growth strategy, announcing plans to set up a new assembly unit in Saudi Arabia and entering into a strategic partnership in Indonesia, as the Hinduja Group flagship seeks to capitalise on rising demand for conventional, electric and defence vehicles across emerging markets.
- **Canara Bank** is selling Rs. 577 crore debt of Supreme Housing and Hospitality. A Swiss challenge auction is planned. The bank has also filed a petition to restart insolvency proceedings. This follows a failed one-time settlement offer by the company. The auction aims to gauge investor interest. Bids are due February 21. An electronic auction is scheduled for March 13.
- **Inox Clean Energy** and **RJ Corp** are partnering for a new venture in Africa's renewable energy sector. They have acquired Skypower Services MENA Ltd. The joint venture plans to commission 570 MW of renewable energy capacity initially. This move marks a significant step in their global expansion plans. The companies aim for substantial growth in Africa's clean energy market.
- **Zydus Lifesciences** and its US subsidiary have settled patent litigation with Astellas Pharma over Astellas' Myrbetriq. Zydus will pay Astellas \$120 million upfront and a per-unit licensing fee on generic Mirabegron sales until September 2027. This agreement resolves all disputes and allows Zydus to continue marketing its generic version in the US.
- **Ceigall India** announced a new project win. The company's wholly owned subsidiary, Ceigall Infra Projects, has received a Letter of Award from the National Highways Authority of India for a highway project in Bihar.
- **Adani Airport Holdings** plans to raise up to Rs 1,500 crore through three-year bonds at 8.45% to consolidate six airports. This move aims to restrict additional indebtedness for these airports, which are projected to double their passenger capacity by FY30. The fundraise aligns with a broader revival in Adani Group's domestic debt market activity.
- **Adani Power** has established Adani Atomic Energy Limited, a wholly owned subsidiary, to generate, transmit, and distribute nuclear power. This move follows the recent passage of the SHANTI Bill, allowing private sector participation in India's nuclear energy sector. The company plans to replace its entire thermal capacity with nuclear power in the coming years.

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

Global News

- U.S. non-farm payroll employment jumped by 130,000 jobs in January after rising by a downwardly revised 48,000 jobs in December. The unemployment rate edged down to 4.3% in January from 4.4% in December.
- U.S. government recorded a \$94.6 billion budget deficit in January 2026, compared with a \$128.6 billion deficit in the same month a year earlier.
- U.K. economy grew by 0.1% in the fourth quarter of 2025, matching the pace recorded in the previous three-month period. On an annual basis, GDP increased by 1.0% in Q4. The U.K. economy grew 0.1% month-on-month in December 2025, following a revised 0.2% increase in November. On a yearly basis, GDP grew 0.7%, below the expected 1.1% and slowing from the 1.2% rise recorded in November.
- U.K. trade deficit narrowed to GBP 4.34 billion in December 2025, down from a downwardly revised GBP 5.56 billion in November.
- U.K. industrial production in the UK unexpectedly fell by 0.9% month-on-month in December 2025, reversing an upwardly revised 1.3% gain in the previous month. On a yearly basis, industrial output eased to 0.5% from 2.3% in the previous month.
- U.K. manufacturing production in the UK fell by 0.5% month-on-month in December 2025, slipping from a downwardly revised and nine-month high of 1.9% gain in the previous month. On a yearly basis, manufacturing activity rose by 0.5% in December, slowing from a downwardly revised 1.3% gain in November.
- Japan's producer prices were up 0.2% on month in January, up from 0.1% in December. On a yearly basis, producer prices rose 2.3% - moderating from 2.4% in the previous month.

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

Economic News

- Crude Oil traded at US\$ 64.52/bbl (IST 17:00).
- INR strengthened to Rs. 90.60 from Rs. 90.71 against each US\$ resulting in daily change of 0.12%.
- Net direct tax collections for the current financial year rose 9.4% year-on-year to Rs 19.43 lakh crore as of February 10, reflecting steady growth in revenue mobilisation compared with the same period last year. Net corporate tax collection grew 14.51% to Rs 8.90 lakh crore, while taxes from non-corporates, including individuals and Hindu Undivided Families (HUFs), rose 5.91% to about Rs 10.03 lakh crore. Securities Transaction Tax collection stood at Rs 50,279 crore between April 1 and February 10, almost flat as compared to the same period last year.
- India US trade deal: This reduction in duty will enhance competitiveness of Indian products, expand market access, and help farmers and exporters increase volumes, thereby strengthening India's agricultural trade surplus with the US.
- India anticipates finalizing an interim trade deal with the US by the end of March. Commerce Secretary Rajesh Agrawal

confirmed the broad outlines are agreed upon. The pact aims to benefit India's labor-intensive sectors. This agreement is expected to boost Indian exports. Teams are actively working to convert the understanding into a legal document.

- Over Rs 72,000 crore in unclaimed bank deposits are held by the RBI's DEA Fund by January 2026. Steps are being taken to help people find their lost money. The government is also boosting cooperative banks and infrastructure investment. Unsecured personal loans have also seen an increase.

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

Forthcoming Events

Board Meetings as on 13/02/2026

Alkem Laboratories Limited	Financial Results/Dividend
Azad Engineering Limited	Financial Results
BASF India Limited	Financial Results
Galaxy Surfactants Limited	Financial Results
Brainbees Solutions Limited	Financial Results
C.E. Info Systems Limited	Financial Results
Camlin Fine Sciences Limited	Financial Results
Aban Offshore Limited	Financial Results
Akums Drugs and Pharmaceuticals Limited	Financial Results
Asian Hotels (East) Limited	Financial Results
Asian Hotels (North) Limited	Financial Results
Asian Hotels (West) Limited	Financial Results
Ballarpur Industries Limited	Financial Results
BF Utilities Limited	Financial Results
BGR Energy Systems Limited	Financial Results
Bharat Road Network Limited	Financial Results
EMS Limited	Financial Results
EPL Limited	Financial Results
Eris Lifesciences Limited	Financial Results
Eros International Media Limited	Financial Results
Essar Shipping Limited	Financial Results
Fortis Healthcare Limited	Financial Results
G R Infraprojects Limited	Dividend
Genus Paper & Boards Limited	Financial Results
Global Vectra Helicorp Limited	Financial Results
GMR AIRPORTS LIMITED	Financial Results
Gokul Refoils and Solvent Limited	Financial Results
Gufic Biosciences Limited	Financial Results
Gujarat Kidney And Super Speciality Limited	Financial Results

Gujarat Mineral Development Corporation Limited	Financial Results
GVK Power & Infrastructure Limited	Financial Results
HCL Infosystems Limited	Financial Results
Hindustan Oil Exploration Company Limited	Financial Results
Honda India Power Products Limited	Financial Results/Dividend
Housing & Urban Development Corporation Limited	Fund Raising
Hubtown Limited	Financial Results/Fund Raising
India Nippon Electricals Limited	Financial Results/Dividend
Indigo Paints Limited	Financial Results
Indo Count Industries Limited	Financial Results
Info Edge (India) Limited	Financial Results/Dividend
Inox Green Energy Services Limited	Financial Results
Inox Wind Limited	Financial Results
IPCA Laboratories Limited	Financial Results
IRB Infrastructure Developers Limited	Financial Results/Dividend/Bonus
Jai Corp Limited	Financial Results
Jamna Auto Industries Limited	Financial Results
Jindal Photo Limited	Financial Results
Jindal Worldwide Limited	Financial Results
Kalyani Investment Company Limited	Financial Results
Kamdhenu Limited	Financial Results
Kfin Technologies Limited	Financial Results
Kirloskar Industries Limited	Financial Results
Kitex Garments Limited	Financial Results
Kohinoor Foods Limited	Financial Results
Liberty Shoes Limited	Financial Results
Lokesh Machines Limited	Financial Results
Lovable Lingerie Limited	Financial Results
Manaksia Aluminium Company Limited	Financial Results
Marathon Nextgen Realty Limited	Financial Results
Mcleod Russel India Limited	Financial Results
MM Forgings Limited	Financial Results
Narayana Hrudayalaya Ltd.	Financial Results
National Fertilizers Limited	Financial Results
Natural Capsules Limited	Financial Results
NBCC (India) Limited	Financial Results
Ola Electric Mobility Limited	Financial Results
Orient Technologies Limited	Financial Results
R K Swamy Limited	Financial Results
Rategain Travel Technologies Limited	Financial Results
Ravinder Heights Limited	Financial Results
RHI MAGNESITA INDIA LIMITED	Financial Results
Savita Oil Technologies Limited	Financial Results

Shakti Pumps (India) Limited	Financial Results
Sical Logistics Limited	Financial Results
Supreme Engineering Limited	Financial Results
Tasty Bite Eatables Limited	Financial Results
The Bombay Burmah Trading Corporation Limited	Financial Results/Dividend
Tilaknagar Industries Limited	Financial Results
Tolins Tyres Limited	Financial Results
Torrent Pharmaceuticals Limited	Financial Results/Dividend
TV Today Network Limited	Financial Results
Valecha Engineering Limited	Financial Results
Valiant Organics Limited	Financial Results
Vijaya Diagnostic Centre Limited	Financial Results
Vikran Engineering Limited	Financial Results
Vivimed Labs Limited	Financial Results
Western Carriers (India) Limited	Financial Results
ZUARI INDUSTRIES LIMITED	Financial Results

(Source: NSE)

Corporate Actions as on 13/02/2026

Axita Cotton Limited	Bonus 1:10
BEML Limited	Interim Dividend - Rs 2.50 Per Share
BLS E-Services Limited	Interim Dividend - Re 0.50 Per Share
BLS International Services Limited	Interim Dividend - Rs 2 Per Share
DELPHI WORLD MONEY LIMITED	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share
Dynamatic Technologies Limited	Interim Dividend - Rs 5 Per Share
Esab India Limited	Interim Dividend - Rs 25 Per Share
Gulf Oil Lubricants India Limited	Interim Dividend - Rs 21 Per Share
HBL Engineering Limited	Interim Dividend - Rs 2 Per Share
Hindustan Copper Limited	Interim Dividend - Re 1 Per Share
K.P.R. Mill Limited	Interim Dividend - Rs 2.50 Per Share
Mahanagar Gas Limited	Interim Dividend - Rs 12 Per Share
Mazagon Dock Shipbuilders Limited	Interim Dividend - Rs 7.50 Per Share
Minda Corporation Limited	Interim Dividend - Re 0.60 Per Share
MRF Limited	Interim Dividend - Rs 3 Per Share
NMDC Limited	Interim Dividend - Rs 2.50 Per Share
NRB Bearing Limited	Interim Dividend - Rs 3.20 Per Share
ROUTE MOBILE LIMITED	Interim Dividend - Rs 3 Per Share
S H Kelkar and Company Limited	Interim Dividend - Re 1 Per Share
Shivalik Bimetal Controls Limited	Interim Dividend - Rs 2 Per Share

Sonata Software Limited	Interim Dividend - Rs 1.25 Per Share
Sreeleathers Limited	Interim Dividend - Re 1 Per Share
Suprajit Engineering Limited	Interim Dividend - Rs 1.50 Per Share
VRL Logistics Limited	Interim Dividend - Rs 5 Per Share

(Source: NSE)

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