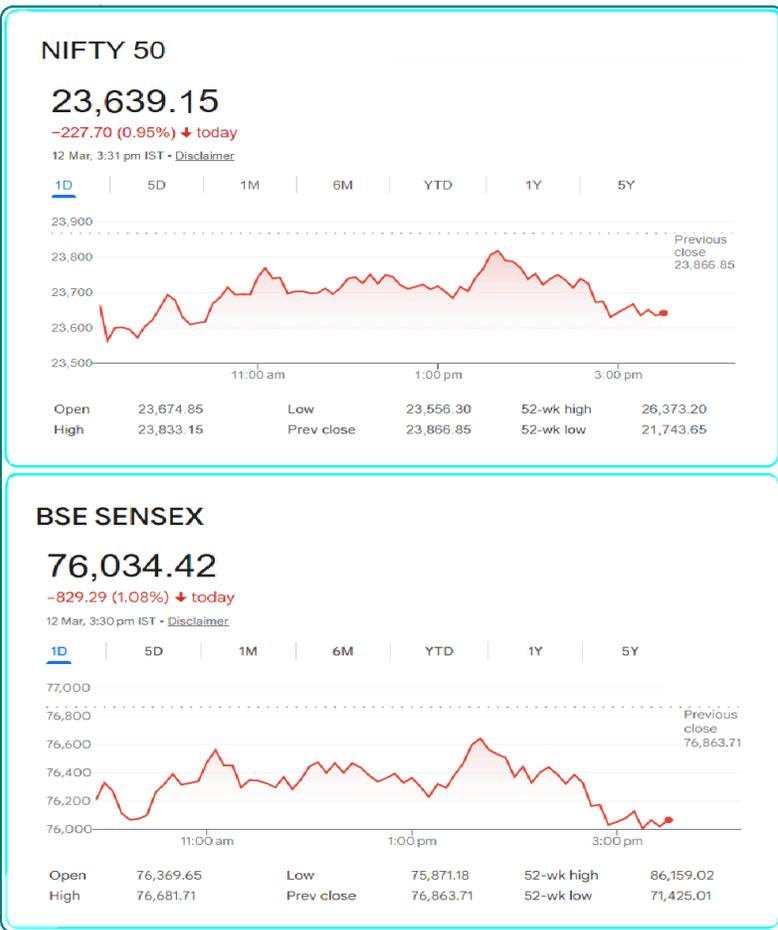


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23639.15	23866.85	-0.95%
S&P BSE SENSEX	76034.42	76863.71	-1.08%
NIFTY MID100	56253.75	56461.10	-0.37%
NIFTY SML100	16305.25	16414.85	-0.67%

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

Market Wrap Up

- The key equity benchmarks ended with steep losses, extending their decline for the second consecutive session, as rising geopolitical tensions in West Asia and concerns about higher oil prices weakened investor sentiment. The Nifty ended below the 23,650 level.
- The S&P BSE Sensex tumbled 829.29 points or 1.08% to 76,034.42. The Nifty 50 index slumped 227.70 points or 0.95% to 23,639.15. In two consecutive trading sessions, the Sensex dropped 2.77% while the Nifty fell 2.56%.
- The S&P BSE Mid-Cap index slipped 0.24% and the S&P BSE Small-Cap index fell 0.32%.
- Among the sectoral indices, the Nifty Oil & Gas index (up 0.48%), the Nifty Metal index (up 0.35%) and the Nifty Media index (up 0.33%) outperformed the Nifty 50 index.
- Meanwhile the Nifty Auto index (down 3.19%), the Nifty FMCG index (down 1.77%) and the Nifty Private Bank index (down 1.60%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **March** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **11880** contracts at the end of the day.
- **Long** position build up for the **March** series has been witnessed in **RELIANCE, BHARTIARTL, HCLTECH**.
- **Short** position build up for the **March** series has been witnessed in **LT, SBIN, ICICIBANK, INFY**.
- **Unwinding** position for the **March** series has been witnessed in **BHEL, HDFCBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55100.95	55735.75	-1.14%
NIFTY AUTO	25098.00	25926.00	-3.19%
NIFTY FMCG	48189.15	49059.70	-1.77%
NIFTY IT	29579.45	29651.70	-0.24%
NIFTY METAL	11863.90	11822.10	0.35%
NIFTY PHARMA	23275.20	23348.05	-0.31%
NIFTY REALTY	719.50	731.40	-1.63%
BSE CG	69704.67	69323.22	0.55%
BSE CD	56343.49	56620.94	-0.49%
BSE Oil & GAS	27497.69	27355.02	0.52%
BSE POWER	7057.01	6884.52	2.51%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	54452.96	55025.37	-1.04%
HANG SENG	25716.76	25898.76	-0.70%
STRAITS TIMES	4855.33	4863.81	-0.17%
SHANGHAI	4129.10	4133.43	-0.10%
KOSPI	5583.25	5609.95	-0.48%
JAKARTA	7362.12	7389.40	-0.37%
TAIWAN	33581.86	34114.19	-1.56%
KLSE COMPOSITE	1711.01	1708.78	0.13%
ALL ORDINARIES	8851.40	8976.80	-1.40%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	123891.41	110325.31
NSE F&O	186339.43	181387.46

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	7049.87

(Source: [NSE](#))

Corporate News

- Ashok Leyland** has announced a substantial investment of Rs 500 crore for a state-of-the-art battery pack production facility on the outskirts of Chennai. Following a successful groundbreaking ceremony, this initiative not only bolsters their ambitions in the electric vehicle sector but also aligns with India's commitment to achieving net-zero emissions.
- Akzo Nobel India** is now JSW Dulux. The Ministry of Corporate Affairs approved the name change. This follows JSW Paints acquiring a majority stake in Akzo Nobel India. The company's name change is effective March 11, 2026. JSW Paints is now the promoter and holding company. This marks a significant shift for the paints and coatings maker.
- KNR Constructions** has received a letter of acceptance from Greater Hyderabad Municipal Corporation for construction of 4 lane unidirectional flyover at Rasoolpura under Engineering Procurement Construction (EPC)/ Turnkey - Basis in the state of Telangana worth Rs. 50.47 crore. The construction period for the said project is 24 months.
- Aurobindo Pharma** said that the United States Food and Drug Administration (USFDA) has issued an Establishment Inspection Report (EIR) for Unit-IV of APL Healthcare, a subsidiary of the company, located in SPSR Nellore district, Andhra Pradesh.
- Bajaj Auto** is considering a new manufacturing plant outside Maharashtra for its electric scooter Chetak. This move follows concerns about incentives under the Maharashtra government's electric vehicle policy. The company is reviewing existing facilities and potential new sites. A decision on the plant's location is expected by June. This expansion aims to bolster Bajaj Auto's electric vehicle business.
- ACME Solar Holdings** announced its arm ACME Greentech Seventh Pvt Ltd has signed two power purchase agreements with SJVN Ltd. These agreements are for supplying 450 MW under a Firm and Dispatchable Renewable Energy Power Project. The PPAs are for a duration of 25 years. This development follows a tariff-based competitive bidding process.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	470.10	446.75	5.23%
NTPC	390.55	379.90	2.80%
POWERGRID	303.60	298.80	1.61%
JIOFIN	242.20	238.70	1.47%
ADANIEN	2002.00	1974.70	1.38%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
M&M	3031.20	3168.20	-4.32%
EICHERMOT	6975.50	7253.50	-3.83%
MARUTI	13011.00	13497.00	-3.60%
BAJFINANCE	863.10	893.65	-3.42%
ULTRACEMCO	11089.00	11462.00	-3.25%

(Source: [Moneycontrol](#))

- **Jindal Steel** has secured one more iron ore mine in Odisha with estimated reserves of nearly 38 million tonnes.
- **Canara Bank** announced that it will increase the marginal cost of funds based lending rates (MCLR) from Thursday. The two year MCLR will be 8.95% from Thursday, revised from 8.85% while three year MCLR will be 9% against 8.90%.
- **TVS Motor Company** has launched the TVS Orbiter V1, its budget-friendly electric scooter that puts sustainable commuting within reach. Priced at just Rs 49,999, this model packs a 1.8 kWh battery and introduces a smart Battery-as-a-Service plan, allowing riders to separate the cost of the vehicle from the battery.
- **VA TECH WABAG** said that it has secured a 'mega' public-private partnership (PPP) contract from the Chennai Metropolitan Water Supply and Sewerage Board (CMWSSB), for a 45 MLD TTRO Plant in Chennai.
- **Wipro** has signed a multi-year agreement with TruStage, the Madison-based insurance and financial services provider, to modernize its retirement services division.
- **Diamond Power Infrastructure** said it has received an order from Tata Power Renewable Energy for the supply of 869 km of AL-59 Eco Conductors.

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

Global News

- U.S. annual inflation rate held steady at 2.4% in February 2026, unchanged from January. On a monthly basis, the CPI rose by 0.3%, slightly accelerating from 0.2% in January. The annual core inflation remained unchanged at 2.5%, the same as in January. On a monthly basis, core CPI increased by 0.2%, less than 0.3% in the previous month.
- U.S. government recorded a \$307.5 billion budget deficit in February 2026, compared with a \$296.3 billion deficit in the same month a year earlier.

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

Economic News

- Crude Oil traded at US\$ 92.07/bbl (IST 17:00).
- INR weakened to Rs. 92.20 from Rs. 92.05 against each US\$ resulting in daily change of 0.16%.
- India's consumer price index rose 3.21% annually in February of 2026, picking up from the 2.74% in the previous month. From the previous month, prices inched higher by 0.11%.
- The administration of Donald Trump has launched a new trade investigation into excess industrial capacity across 16 major trading partners after the U.S. Supreme Court struck down the core of Trump's global tariff programme last month. Jamieson Greer said the probe under Section 301 of the Trade Act of 1974 could result in new tariffs on countries including China, European Union, India, Japan, South Korea and Mexico as early as this summer.
- The amended foreign direct investment (FDI) policy guidelines have allowed proposals for investments from China and other land-border countries to include advanced battery components, rare earth permanent magnets, rare earth processing sectors, whose applications will be processed and decided within 60 days.
- The Centre urged farmers to verify their details on the PM-KISAN portal and complete e-KYC at the earliest, ahead of the release of the 22nd instalment worth Rs 18,640 crore on March 13.
- India is set to launch a massive Rs. 1 trillion fund to boost domestic chipmaking, aiming to become a global manufacturing hub. This initiative will offer subsidies for chip design, manufacturing equipment, and supply chain development, building on existing programs that have attracted major players like Micron and Tata Group. The ambitious plan seeks to elevate India's semiconductor capabilities by 2032.

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

Forthcoming Events

Board Meetings as on 13/03/2026

Repc Home Finance Limited	Fund Raising
Banco Products (I) Limited	Dividend
Housing Development and Infrastructure Limited	Financial Results
Mishra Dhatu Nigam Limited	Dividend
Vivimed Labs Limited	Financial Results

(Source: NSE)

Corporate Actions as on 13/03/2026

eClerx Services Limited	Bonus 1:1
Indian Railway Finance Corporation Limited	Interim Dividend - Rs 1.05 Per Share
Railtel Corporation Of India Limited	Interim Dividend - Re 1 Per Share

(Source: NSE)

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