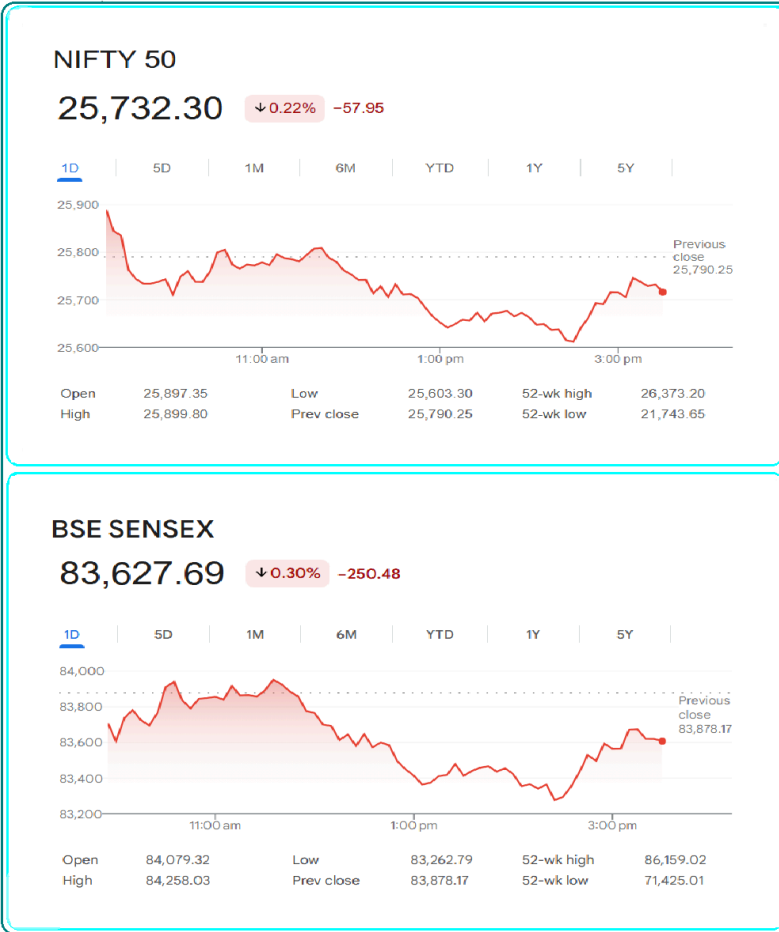


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25732.30	25790.25	<b>-0.22%</b>
<b>S&amp;P BSE SENSEX</b>	83627.69	83878.17	<b>-0.30%</b>
<b>NIFTY MID100</b>	59597.80	59717.10	<b>-0.20%</b>
<b>NIFTY SML100</b>	17295.80	17193.30	<b>0.60%</b>

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

## Market Wrap Up

- The key equity barometers ended with minor losses today, weighed down by profit booking, foreign fund outflows and the expiry of F&O contracts on the NSE. Investor sentiment remained cautious amid developments related to the India-US trade deal, ongoing Q3 earnings announcements and geopolitical concerns. The Nifty slipped below the 25,750 mark, after touching an intraday high of 25,899.80 in early trade.
- The S&P BSE Sensex slipped 250.48 points or 0.30% to 83,627.69. The Nifty 50 index lost 57.95 points or 0.22% to 25,732.30.
- The S&P BSE Mid-Cap index declined 0.16% and the S&P BSE Small-Cap index rose 0.46%.
- Among the sectoral indices, the Nifty PSU Bank index (up 0.78%), the Nifty Media index (up 0.76%) and the Nifty IT index (up 0.65%) outperformed the Nifty 50 index. Meanwhile, the Nifty Consumer Durables index (down 0.89%), the Nifty Realty index (down 0.62%) and the Nifty Pharma index (down 0.47%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **January** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **6716** contracts at the end of the day.
- **Long** position build up for the **January** series has been witnessed in **ONGC, SBIN, ICICIBANK, INFY**.
- **Short** position build up for the **January** series has been witnessed in **RELIANCE, LT, BHARTIARTL, HDFCBANK, BAJFINANCE**.
- **Unwinding** position for the **January** series has been witnessed in **BHEL, ITC**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	59578.80	59450.50	0.22%
NIFTY AUTO	27915.10	28011.75	-0.35%
NIFTY FMCG	52577.15	52745.50	-0.32%
NIFTY IT	38236.55	37988.25	0.65%
NIFTY METAL	11355.20	11315.75	0.35%
NIFTY PHARMA	22562.30	22668.45	-0.47%
NIFTY REALTY	857.95	863.30	-0.62%
BSE CG	64611.74	65047.92	-0.67%
BSE CD	61443.26	61832.88	-0.63%
BSE Oil & GAS	27469.81	27435.87	0.12%
BSE POWER	6314.32	6336.11	-0.34%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	53549.16	51939.89	3.10%
HANG SENG	26848.47	26608.48	0.90%
STRAITS TIMES	4807.13	4766.78	0.85%
SHANGHAI	4138.76	4120.43	0.44%
KOSPI	4692.64	4624.79	1.47%
JAKARTA	8948.30	8884.72	0.72%
TAIWAN	30707.22	30567.29	0.46%
KLSE COMPOSITE	1708.20	1695.44	0.75%
All ORDINARIES	9138.50	9092.70	0.50%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	101636.97	103691.69
NSE F&O	203562.07	209064.45

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1499.81

(Source: [NSE](#))

## Corporate News

- HCL Technologies Ltd's** Q3 FY26 consolidated net profit declined 11% on-year to Rs 4,076 crore. Consolidated revenue increased 13.3% from a year earlier to Rs 33,872 crore in the quarter ending December 31. In constant currency (CC) terms, the firm's revenue grew 4.8% YoY.
- Larsen & Toubro** has clarified that oil project tenders in Kuwait, reportedly facing cancellation, were not part of its order book. This statement comes after the company's shares saw a significant drop. Kuwait is reportedly reviewing oil project tenders worth approximately \$8.7 billion due to bids exceeding budgets. L&T was the lowest bidder for tenders exceeding \$4.5 billion.
- Biocon** has launched a qualified institutional placement (QIP) worth Rs 4,150 Crore. The indicative price per share is Rs 368.35. This represents a discount of 5% to the current market price, directed to fund growth initiatives.
- NBCC** has entered into a Memorandum of Understanding (MoU) with Bharat Electronics for a healthcare manufacturing and services atmosphere. This marks a strategic step into the healthcare infra space with potential long-term growth opportunities.
- TVS Supply Chain Solutions** secured a three-year contract from Daimler India Commercial Vehicles (DICV) to manage in-plant warehouse operations at DICV's manufacturing facility in Chennai.
- Bank of Maharashtra** reported a 26.5% year-on-year rise in profit after tax (PAT) at Rs 1,779.33 crore for the December quarter. The lender reported a PAT of Rs 1406.45 crore in the year-ago period. Sequentially, the net profit was up 8.9%. Other income surged 18.41% to Rs 932.86 crore. NII grew by 16.27% year-on-year basis to Rs 3,422 crore in Q3FY26 as against Rs 2,943 crore for Q3FY25.
- ICICI Prudential Life Insurance's** profit after tax rose 19.6% year-on-year to Rs 390 crore in Q3 FY26, compared with Rs 326 crore a year earlier.
- GTPL Hathway** posted consolidated net profit jumped 8.3% to Rs 11.01 crore on 5.1% rise in revenue from operations to Rs 932.62 crore in Q3 December 2025 over Q3 December 2024. During the quarter, revenue from

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ONGC	243.78	235.71	3.42%
ETERNAL	294.55	285.25	3.26%
TECHM	1614.80	1586.10	1.81%
HINDALCO	936.30	920.15	1.76%
ICICIBANK	1437.00	1413.10	1.69%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TRENT	3921.90	4056.40	-3.32%
LT	3887.40	4019.00	-3.27%
RELIANCE	1452.80	1483.20	-2.05%
DRREDDY	1191.30	1215.50	-1.99%
INDIGO	4759.50	4850.00	-1.87%

(Source: [Moneycontrol](#))

- **Larsen & Toubro** said its transportation infrastructure business vertical has secured a significant order for an arterial cable-stayed bridge over the Muri Ganga river in the South 24 Parganas district of West Bengal. As per L&T's internal classification, the contract falls under the 'significant' category, with an estimated value in the range of Rs 1,000 crore to Rs 2,500 crore.
- **Tata Punch** 2026 facelift vs 2025 Tata Punch price comparison : Tata's 2026 Punch facelift arrives with a bolder design, premium interior, and enhanced tech. A new 1.2-litre turbo-petrol engine offers spirited performance, while safety remains top-notch with six airbags and a five-star NCAP rating.
- **Mahindra & Mahindra** will decide the location for its new manufacturing plant in the next six months. This move aims to increase its utility vehicle production capacity. The company is exploring various sites across states.
- **Zydus Lifesciences** said its U.S.-based biopharmaceutical arm, Sentyln Therapeutics Inc, announced that the U.S. Food and Drug Administration (FDA) has approved ZYCUBO (copper histidinate) for the treatment of Menkes disease in pediatric patients.

digital cable TV fell 1.79% YoY to Rs 297 crore while revenue from broadband jumped 3.62% YoY to Rs 143.3 crore.

- **NBCC (India)** said that its wholly owned subsidiary HSCC (India) has entered into a memorandum of understanding with Bharat Electronics (BEL) to establish a strategic collaboration in the healthcare manufacturing and service ecosystem.
- **VA Tech WABAG** has secured a large domestic order from Bharat Petroleum Corporation (BPCL) for advanced water treatment facilities at the Bina Petchem and Refinery Expansion Project in Bina, Madhya Pradesh.
- **Sical Logistics Ltd** said it has secured a letter of acceptance from South Eastern Coalfields Ltd (SECL) for a new project. The aggregate value of this project is Rs. 4,038 Crore, including GST.
- **Krystal Integrated Services Ltd** announced that it has bagged three major municipal solid waste management contracts from the Vasai-Virar City Municipal Corporation (VCCMC). The combined value of this contract is worth approximately Rs. 275 Crore.
- **KPI Green Energy** announced that it has entered into an agreement with the government of Gujarat for developing renewable energy projects. These projects are worth Rs. 4,000 Crore.
- **Puravankara** said that its wholly owned subsidiary Starworth Infrastructure & Construction (SICL) has received a letter of intent (LoI) for the construction of an East Bangalore-based proposed residential project "Sattva AANGANE". The project has an approximate contract value of Rs 311.18 crore.
- Omaxe Ltd. is investing Rs 500 crore to develop Omaxe Chowk, a mixed-use high-street project in Ludhiana, on a leasehold basis secured from RLDA. The development will feature premium retail, dining, and entertainment zones, aiming to offer consumers a destination with choice and convenience. This Public-Private Partnership project is slated for delivery by June 2030.

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

## Global News

- Germany's current account surplus narrowed to EUR 15.1 billion in November 2025, down from EUR 18.8 billion a year earlier.
- Australia's Westpac–Melbourne Institute Consumer Sentiment Index slipped 1.7% mom in January 2026 to a three-month low of 92.9, extending December's sharp 9.0%.
- Japan's current account surplus increased to JPY 3,674.1 billion in November 2025 from JPY 3,338.9 billion in the same month a year earlier.
- Japan's bank lending increased 4.4% in December 2025, accelerating from a downwardly revised 4.1% growth in November.

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

## Economic News

- Crude Oil traded at US\$ 60.52/bbl (IST 17:00).
- INR weakened to Rs. 90.20 from Rs. 90.17 against each US\$ resulting in daily change of 0.03%.
- India's vegetable oil imports rose eight per cent to 13.83 lakh tonnes in December 2025, the second month of the 2025-26 oil year, from the year-ago period. The world's biggest vegetable oil importer had bought 12.75 lakh tonnes, including edible and non-edible oils, in December 2024.
- India could revamp its incentive scheme for electric passenger car manufacturing since the proposed free trade agreement (FTA) with the European Union (EU) is expected to offer tariff cuts on fully built or semi-knocked-down electric vehicles.
- Wheat sowing has increased by 2% to 334.17 lakh hectares as of January 9. Wheat acreage stood at 328.04 lakh hectares in the same period of the preceding rabi season.
- India's electronics exports have surpassed Rs 4 lakh crore in 2025. This growth is creating jobs and boosting foreign exchange earnings. The momentum is set to continue into 2026. This is due to four new semiconductor plants commencing commercial production.

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

## Forthcoming Events

### Board Meetings as on 14/01/2026

Infosys Limited	Financial Results
HDB Financial Services Limited	Financial Results
HDFC Asset Management Company Limited	Financial Results
ICICI Prudential Asset Management Company Limited	Financial Results/Dividend
Anand Rathi Share and Stock Brokers Limited	Financial Results
Billionbrains Garage Ventures Limited	Financial Results
Union Bank of India	Financial Results
Sun Pharma Advanced Research Company Limited	Fund Raising
Aditya Birla Money Limited	Financial Results
Den Networks Limited	Financial Results
Indian Overseas Bank	Financial Results
Indosolar Limited	Financial Results
Mangalore Refinery and Petrochemicals Limited	Financial Results
Network18 Media & Investments Limited	Financial Results
Plastiblends India Limited	Financial Results
Reliance Industrial Infrastructure Limited	Financial Results

(Source: NSE)

### Corporate Actions as on 14/01/2026

Kotak Mahindra Bank Limited	Face Value Split (Sub-Division) - From Rs 5/- Per Share To Re 1/- Per Share
Ajmera Realty & Infra India Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share

(Source: NSE)

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