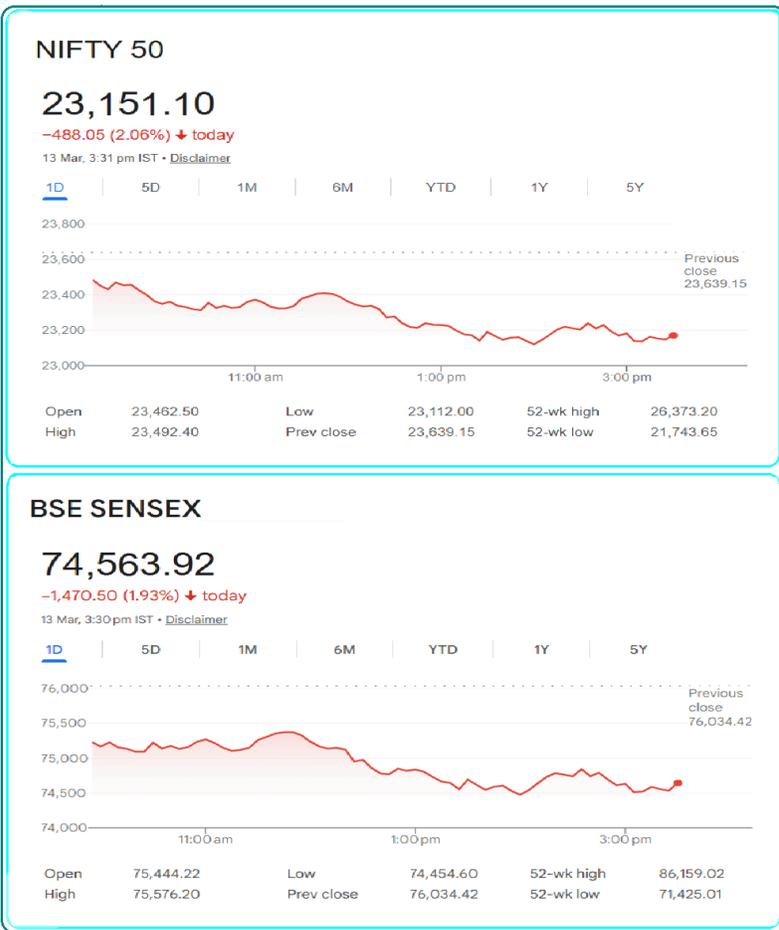


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23151.10	23639.15	<b>-2.06%</b>
<b>S&amp;P BSE SENSEX</b>	74563.92	76034.42	<b>-1.93%</b>
<b>NIFTY MID100</b>	54761.10	56253.75	<b>-2.65%</b>
<b>NIFTY SML100</b>	15895.25	16305.25	<b>-2.51%</b>

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

## Market Wrap Up

- The key equity benchmarks ended with major losses, extending their decline for the third consecutive day. Market sentiment remained under pressure amid persistent selling by foreign institutional investors (FIIs), a sharp rise in crude oil prices, and escalating geopolitical tensions as the Middle East conflict entered its 14th day. Brent crude hovered around the \$100-per-barrel mark, adding to investors' concerns and further dampening market confidence. The Nifty ended below the 23,200 level. The S&P BSE Sensex slumped 1,470.50 points or 1.93% to 74,563.92. The Nifty 50 index plummeted 488.05 points or 2.06% to 23,151.10. In three consecutive trading sessions, the Sensex dropped 4.65% while the Nifty fell 4.57%. The S&P BSE Mid-Cap index tumbled 2.61% and the S&P BSE Small-Cap index fell 2.67%. Among the sectoral indices, the Nifty FMCG index (down 0.55%), the Nifty Realty index (down 1.35%) and the Nifty IT index (down 1.72%) outperformed the Nifty 50 index. Meanwhile the Nifty Metal index (down 4.82%), the Nifty PSU Bank index (down 3.72%) and the Nifty Auto index (down 3.60%) 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 **38744** contracts at the end of the day.
- Long** position build up for the **March** series has been witnessed in **HINDUNILVR, BRITANNIA**.
- Short** position build up for the **March** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Unwinding** position for the **March** series has been witnessed in **TCS, HEROMOTOCO**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	53757.85	55100.95	-2.44%
NIFTY AUTO	24195.10	25098.00	-3.60%
NIFTY FMCG	47924.15	48189.15	-0.55%
NIFTY IT	29071.25	29579.45	-1.72%
NIFTY METAL	11292.50	11863.90	-4.82%
NIFTY PHARMA	22832.20	23275.20	-1.90%
NIFTY REALTY	709.80	719.50	-1.35%
BSE CG	67620.20	69704.67	-2.99%
BSE CD	55011.77	56343.49	-2.36%
BSE Oil & GAS	26864.10	27497.69	-2.30%
BSE POWER	6922.20	7057.01	-1.91%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	53819.61	54452.96	-1.16%
HANG SENG	25465.60	25716.76	-0.98%
STRAITS TIMES	4842.27	4855.33	-0.27%
SHANGHAI	4095.45	4129.10	-0.81%
KOSPI	5487.24	5583.25	-1.72%
JAKARTA	7137.21	7362.12	-3.05%
TAIWAN	33400.32	33581.86	-0.54%
KLSE COMPOSITE	1698.85	1711.01	-0.71%
ALL ORDINARIES	8839.10	8851.40	-0.14%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	121547.53	123891.41
NSE F&O	246986.86	186339.64

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	10716.64

(Source: [NSE](#))

## Corporate News

- HCL Technologies** announced the expansion of its strategic collaboration with Google Cloud to help accelerate enterprise adoption of Agentic AI across industries.
- Tata Motors** has secured cumulative orders for more than 5,000 buses and bus chassis from multiple State Transport Undertakings (STUs) across the country.
- Godrej Properties** said that it has acquired a 44-acre land parcel in Coimbatore through an outright purchase, for developing a premium plotted residential project with a developable potential of 1.1 million square feet.
- United Breweries** has received a GST demand order from the Office of the Commissioner of CGST & Central Excise, Raigad-Navi Mumbai.
- Ramky Infrastructure** secured a design, build, finance, operate and transfer (DBFOT) contract from the Maharashtra Industrial Development Corporation (MIDC).
- Zydu Lifesciences** said it has received final approval from the United States Food and Drug Administration (USFDA) for Cevimeline Hydrochloride Capsules 30 mg.
- Biocon** said its arm, Biocon Pharma, has received approval from the U.S. Food and Drug Administration (USFDA) for its abbreviated new drug application (ANDA) for Liraglutide injection (gVictoza), 18 mg/3 mL, in single-patient-use prefilled pens.
- Kalpataru** announced the signing of a redevelopment project at a prime location in Andheri West, with gross development value (GDV) of Rs 1,400 crore.
- HFCL Limited** has signed a significant five-year deal worth Rs10,159 crore. The agreement is for supplying high-quality Optical Fiber Cables to a global multinational corporation. This landmark contract, running from 2026 to 2030, will be executed through HFCL's overseas subsidiary.
- Coal India** announced that its wholly owned subsidiary, Central Mine Planning and Design Institute (CMPDIL) filed red herring prospectus (RHP) with Securities and Exchange Board of India (SEBI), BSE and NSE.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATACONSUM	1083.60	1057.80	2.44%
HINDUNILVR	2160.00	2136.90	1.08%
BHARTIARTL	1803.40	1801.30	0.12%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
LT	3439.00	3719.50	-7.54%
HINDALCO	910.05	969.75	-6.16%
TATASTEEL	183.51	193.47	-5.15%
JSWSTEEL	1119.30	1172.60	-4.55%
ULTRACEMCO	10616.00	11089.00	-4.27%

(Source: [Moneycontrol](#))

- **Bondada Engineering** announced that it has received an order worth Rs 35.39 crore from Pratap Technocrats for the supply of 40-metre towers.

- **Krystal Integrated Services** said it has received a Rs 364 crore contract from Tamil Nadu Medical Services Corporation (TNMSC) for providing housekeeping, security, and other services at various government medical institutions in Tamil Nadu. .

- **Action Construction Equipment** (ACE) said that it has executed an investment and shareholders agreement with KATO Works Co., Japan, for manufacturing heavy cranes, namely truck cranes, crawler cranes and rough terrain cranes.

- **Gravita India** said that it has signed definitive agreements for acquisition of 98.95% stake of Rashtriya Metal Industries (RMIL) for a total consideration of Rs 559.08 crore.

- **Mahindra EPC Irrigation** said it has secured a contract worth about Rs 2.22 crore for the supply of micro irrigation systems under a community micro irrigation project.

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

## Global News

- U.S. initial jobless claims slipped to 213,000 in the week ended March 7th, a decrease of 1,000 from the previous week's revised level of 214,000. Continuing jobless claims fell by 21,000 to 1,850,000 in the last week of February.
- U.S. trade deficit shrank to \$54.5 billion in January from a revised \$72.9 billion in December. Exports jumped 5.5% to a record high of \$302.1 billion while imports declined 0.7% to \$356.6 billion.
- U.S. housing starts spiked by 7.2% to an annual rate of 1.487 million in January after jumping by 4.8% to a revised rate of 1.387 million in December. Building permits fell 5.4% month-on-month to a seasonally adjusted annualized rate of 1.376 million in January 2026.
- U.S. goods trade deficit narrowed to \$80.8 billion in January 2026 from \$98.5 billion in the previous month.
- U.K. GDP stalled mom in January 2026, following a 0.1% rise in December. Services showed no growth (vs +0.2% in the previous month). Year-on-year, the economy expanded 0.8%. Considering the three months to January, the GDP grew 0.2%.
- U.K. recorded a trade surplus of GBP 3.92 billion in January 2026, a sharp reversal from a GBP 4.34 billion deficit in the previous month.
- U.K. industrial production fell 0.1% month-on-month in January 2026, but easing from a 0.9% decline in December. On an

annual basis, industrial activity edged down to 0.4% from 0.5% in December.

- U.K. manufacturing production edged up by 0.1% month-on-month in January 2026, rebounding from a 0.5% fall in the previous month. On a yearly basis, manufacturing activity rose by 1.3% in January, accelerating from a 0.5% gain in the preceding period.
- Eurozone industrial production fell 1.5% month-on-month in January 2026, following a revised 0.6% decline in December. On an annual basis, industrial production fell 1.2%.
- Germany's wholesale prices rose 1.2% year-on-year in February 2026, matching the pace recorded in the previous two months. On a monthly basis, wholesale prices went up 0.6%, slowing from 0.9% in January but exceeding market forecasts of a 0.4% rise. source: Federal Statistical Office
- France's annual inflation picked up to 0.9% in February 2026 from 0.3% in January. On a monthly basis, the CPI rose 0.6% after a 0.3% decline in January.

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

## Economic News

- Crude Oil traded at US\$ 93.66/bbl (IST 17:00).
- INR weakened to Rs. 92.46 from Rs. 92.20 against each US\$ resulting in daily change of 0.28%.
- India's domestic passenger vehicle dispatches from companies to dealers rose 10.6% year-on-year to 4,17,705 units in February, according to SIAM. Passenger vehicle dispatches stood at 3,77,689 units in February 2025. Utility vehicles, which clocked a growth of 13.5% at 2,36,957 units as compared to 2,08,795 units in February last year. Passenger car dispatches declined 3.8% at 1,06,799 units last month as compared to 1,10,966 units in the year-ago period. Sales of vans in the domestic market were at 11,620 units last month as compared to 11,493 units in February 2025, up 1.1%. Two-wheeler sales rose 35.2% to 18,71,406 units last month as against 13,84,605 units in February last year. Motorcycle sales in February were up 30.8% at 10,96,537 units as against 8,38,250 units in the year-ago month. Similarly, scooter sales rose 42.3% at 7,29,774 units last month as compared to 5,12,783 units in the same period last year. Three-wheeler dispatches to dealers were up 29% last month at 74,573 units as against 57,788 units in the year-ago period.
- India will delay signing a trade deal with the United States for several months. New investigations by the US administration have created friction. India expects to sign an interim deal later. The US expects India to honor its commitments. India will take a wait and watch approach.
- India is sourcing liquefied petroleum gas from new countries like the United States, Norway, Canada, and Russia. The nation's crude oil supply remains secure with increased imports from non-Hormuz routes. Biomass, kerosene, and coal are now permitted as alternative fuels for the hospitality sector. Consumer anxiety, not a shortage, is driving concerns over cooking gas availability.
- India has asked China to allow the sale of some urea cargoes as the war in the Middle East disrupts gas supplies needed for fertilizer production. Indian officials have urged Beijing to ease export restrictions as liquefied natural gas shortages force some domestic fertilizer plants to shut.

- China will soon implement anti-dumping duties on halogenated butyl rubber. This action follows an investigation into imports from India, Japan, and Canada. The Chinese Ministry of Commerce found that these products were sold at unfairly low prices. Tariffs of up to 30.1% will affect shipments from Japan and Canada starting March 14.

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

## Forthcoming Events

### Board Meetings as on 14/03/2026

Omnitech Engineering Limited	Financial Results
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### Board Meetings as on 16/03/2026

Patel Integrated Logistics Limited	Voluntary Delisting
REC Limited	Dividend
Satin Creditcare Network Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 16/03/2026

DIC India Limited	Dividend - Rs 3 Per Share
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(Source: NSE)

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