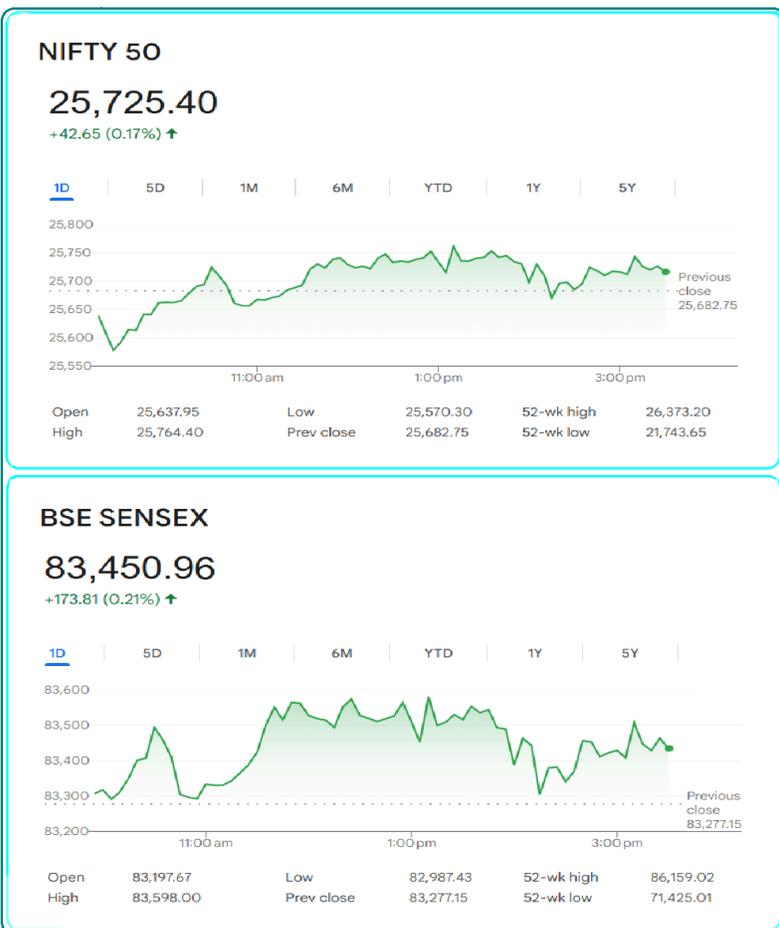


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25725.40	25682.75	<b>0.17%</b>
<b>S&amp;P BSE SENSEX</b>	83450.96	83277.15	<b>0.21%</b>
<b>NIFTY MID100</b>	59881.70	59723.00	<b>0.27%</b>
<b>NIFTY SML100</b>	17146.70	17050.90	<b>0.56%</b>

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

## Market Wrap Up

- The frontline equity indices ended with moderate gains, extending rally for the second consecutive session, supported by buying in index heavyweights and strength in the broader market. The Nifty ended above the 25,700 level.
- The S&P BSE Sensex jumped 173.81 points or 0.21% to 83,450.96. The Nifty 50 index rallied 42.65 points or 0.17% to 25,725.40. In the two consecutive trading sessions, the Sensex and Nifty jumped 1% each.
- The BSE 150 MidCap Index climbed 0.31% and the BSE 250 SmallCap Index rose 0.86%.
- Among the sectoral indices, the Nifty PSU Bank index (up 2.11%), the Nifty IT index (up 1.03%) and the Nifty FMCG index (up 0.90%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 1.06%), Nifty Realty index (down 0.30%) and the Nifty Oil & Gas index (down 0.11%) and the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **February** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **1699** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **SBIN, ONGC, INFY**.
- **Short** position build up for the **February** series has been witnessed in **RELIANCE, BHARTIARTL, ICICIBANK, HDFCBANK, BAJFINANCE**.
- **Unwinding** position for the **February** series has been witnessed in **HEROMOTOCO, TATAPOWER**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	61174.00	60949.10	0.37%
NIFTY AUTO	28174.55	28028.20	0.52%
NIFTY FMCG	51778.30	51318.85	0.90%
NIFTY IT	33075.05	32738.05	1.03%
NIFTY METAL	11828.40	11955.00	-1.06%
NIFTY PHARMA	22494.90	22403.15	0.41%
NIFTY REALTY	834.15	836.70	-0.30%
BSE CG	69483.84	68957.07	0.76%
BSE CD	59853.33	59350.70	0.85%
BSE Oil & GAS	28891.78	28849.41	0.15%
BSE POWER	6878.38	6874.84	0.05%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	56566.49	56806.41	-0.42%
HANG SENG	CLOSED	26705.94	-
STRAITS TIMES	CLOSED	4938.58	-
SHANGHAI	CLOSED	CLOSED	-
KOSPI	CLOSED	CLOSED	-
JAKARTA	CLOSED	CLOSED	-
TAIWAN	CLOSED	CLOSED	-
KLSE COMPOSITE	CLOSED	1741.26	-
ALL ORDINARIES	9182.50	9163.80	0.20%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	95690.63	123599.44
NSE F&O	203827.49	190130.06

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	995.21
NET SELL	-

(Source: [NSE](#))

## Corporate News

- **Infosys** announced a strategic collaboration with Anthropic, an AI safety and research company, to develop and deliver advanced enterprise AI solutions to companies across industries.
- **Maruti Suzuki** has unveiled its new electric SUV, the e VITARA. The vehicle launches with an attractive starting price of Rs 10.99 lakh. This pricing is part of a Battery-as-a-Service model. Customers will pay an additional Rs 3.99 for every kilometre driven. This innovative approach aims to make electric mobility more accessible.
- **Cochin Shipyard** said it was declared the lowest bidder at a meeting held at the Ministry of Defence in New Delhi. The company has emerged as the L1 bidder in a key defence tender floated for the construction of five Next Generation Survey Vessels for the Indian Navy.
- **TVS Supply Chain Solutions** signed memorandum of understanding (MoU) with ALA Group, to explore opportunities in India's aerospace and defence supply chain.
- **JSW MG Motor** is gearing up for a major leap with a staggering investment of Rs 3,000 crore. This ambitious plan will not only introduce a state-of-the-art manufacturing facility but also unveil an exciting lineup of new vehicles.
- **Britannia Industries** plans significant investments to counter regional competitors and boost its e-commerce presence. The company aims to adopt a startup mentality to challenge smaller players. This strategy focuses on strengthening its position in key product categories like biscuits and cakes. Britannia is committed to driving topline growth and expanding its consumer base.
- **Jindal Power, Vedanta, and Havells India** are among 22 potential bidders for debt-laden Gupta Power Infrastructure, which faces insolvency proceedings with admitted claims of Rs. 4,240 crore. Other interested parties include UltraTech Cement and Torrent Electricals. The company manufactures cables, wire rods, and conductors.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ADANIENT	2242.90	2184.60	2.67%
ITC	325.45	317.95	2.36%
BEL	446.85	438.00	2.02%
INFY	1391.20	1365.60	1.87%
LT	4279.80	4201.50	1.86%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	890.10	907.45	-1.91%
ETERNAL	281.50	286.60	-1.78%
TRENT	4171.90	4229.50	-1.36%
TATASTEEL	203.08	205.81	-1.33%
RELIANCE	1423.00	1437.10	-0.98%

(Source: [Moneycontrol](#))

- **Bajel Projects** entered into a joint venture agreement with Al-Sharif Contracting & Commercial Development Co (ASC) to establish a joint venture entity in the Kingdom of Saudi Arabia (KSA).
- **G R Infraprojects** said that it has bagged a Rs 1,897.51-crore order for the construction of a new railway line from Km 124/400 to Km 165/380 between Bahari & Gondawali stations as part of the Sidhi-Singrauli new rail link project in Madhya Pradesh.
- **KNR Constructions** has received a Letter of Acceptance for Construction of Four Lane Elevated Corridor along East Coast Road (ECR) from design Chainage Km. 11+480 to Km. 11/800 (West Avenue Road) and upto Km. 24+780 (East Coast Road) Thiruvanniyur to Uthandi in SH-49 on Hybrid Annuity Mode (HAM). Further the signing of Concession Agreement is subject to the outcome of the W.A. No. 284 of 2026 of Madras High Court. The bid project cost is Rs 2,163.07 crore.
- **Delhivery** announced a strategic partnership with electric mobility startup RIDEV (ANV Web Ventures) to deploy 150 high performance electric vehicles (EVs) across India over the next three months.
- **HFCL** along with its material subsidiary HTL, secured purchase orders worth Rs 60.95 crore from a domestic telecom service provider.
- **Highway Infrastructure** said it has secured a contract from the National Highways Authority of India (NHAI) for toll operations on key stretches of the Vadodara-Mumbai Expressway in Gujarat. The contract, awarded by a domestic entity, is valued at Rs 154.59 crore.
- **Texmaco Rail & Engineering** secured an order worth Rs 219.18 crore from Mumbai Railway Vikas Corporation (MRVC).
- **Zydus Lifesciences** said that it has launched PEPAIR, India's first affordable Oscillating Positive Expiratory Pressure (OPEP) device, priced at Rs 990 per unit.
- **Lupin** announced that it has signed a licence and supply agreement with Spektus Pharma to commercialize the novel antidepressant DeslaFlex in Canada.
- **The Adani Group** will invest \$100 billion to develop green energy-backed, hyperscale AI-ready data centres. The initiative is expected to catalyse an additional \$150 billion across manufacturing, servers and sovereign cloud services over the next decade, creating a projected \$250 billion AI infrastructure ecosystem.
- **NBCC (India)** said that it has been awarded two new projects with a combined value of Rs 104.95 crore. The first project, valued at Rs 14.72 crore, was awarded by the Rourkela Steel Plant (RSP), SAIL Rourkela. The second and larger contract, worth Rs 90.23 crore, was awarded by NLC India.

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

## Global News

- U.K. unemployment rate rose to 5.2% in the three months to December 2025. The number of people claiming unemployment benefits increased by 28.6 thousand to 1.691 million in January 2026, following a downwardly revised 2.7 thousand rise in the previous month.
- Eurozone ZEW Economic Sentiment Index decreased to 39.40 points in February from 40.80 points in January of 2026.
- Germany's annual inflation rate rose to 2.1% in January 2026 from 1.8% in December. On a monthly basis, consumer prices edged up 0.1% after stagnating in December.
- Germany's ZEW Indicator of Economic Sentiment slipped to 58.3 in February 2026 from January's more than four-year high of 59.6. The assessment of current conditions rose to -65.9.

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

## Economic News

- Crude Oil traded at US\$ 64.04/bbl (IST 17:00).
- INR weakened to Rs. 90.69 from Rs. 90.66 against each US\$ resulting in daily change of 0.03%.
- India's textile exports in January have declined by -3.68%, while apparel exports are down by -3.84% in January 2026 compared with January 2025, according to the data shared by Confederation of Indian Textile Industry (CITI).
- The amount of cash circulating in the economy has hit an all-time peak of Rs 40 lakh crore in January, after rising 11.1% year-on-year. Yet, interestingly, the cash-to-GDP ratio has dipped, suggesting that digital payments are playing a much bigger role than before.

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

## Forthcoming Events

### Board Meetings as on 18/02/2026

Affordable Robotic & Automation Limited	Fund Raising
NBCC (India) Limited	Dividend

(Source: NSE)

### Corporate Actions as on 18/02/2026

Coal India Limited	Interim Dividend - Rs 5.50 Per Share
Hindustan Aeronautics Limited	Interim Dividend - Rs 35 Per Share
Honda India Power Products Limited	Interim Dividend - Rs 3.50 Per Share
Mstc Limited	Interim Dividend - Rs 7.60 Per Share
Oil & Natural Gas Corporation Limited	Interim Dividend - Rs 6.25 Per Share
Ashiana Housing Limited	Interim Dividend - Re 1 Per Share
Bhansali Engineering Polymers Limited	Interim Dividend - Re 1 Per Share
Bharat Forge Limited	Interim Dividend - Rs 2 Per Share
CMS Info Systems Limited	Interim Dividend - Rs 2.75 Per Share
G R Infraprojects Limited	Interim Dividend - Rs 2.50 Per Share
Goodluck India Limited	Interim Dividend - Rs 3 Per Share
Indraprastha Gas Limited	Interim Dividend - Rs 3.25 Per Share
Natco Pharma Limited	Interim Dividend - Rs 1.50 Per Share
Oil India Limited	Interim Dividend - Rs 7 Per Share
Oriental InfraTrust	Distribution - Rs 2.2834 Per Unit
Sical Logistics Limited	Rights 11:5 @ Premium Rs 54/-
Torrent Pharmaceuticals Limited	Interim Dividend - Rs 29 Per Share

(Source: NSE)

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