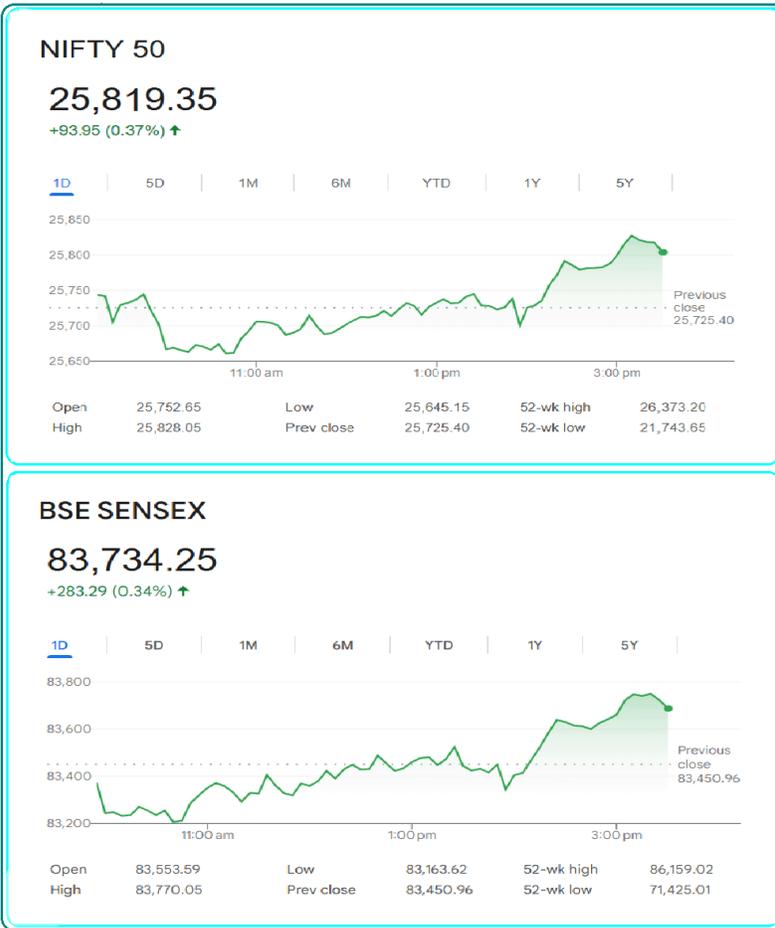


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25819.35	25725.40	<b>0.37%</b>
<b>S&amp;P BSE SENSEX</b>	83734.25	83450.96	<b>0.34%</b>
<b>NIFTY MID100</b>	60183.20	59881.70	<b>0.50%</b>
<b>NIFTY SML100</b>	17239.25	17146.70	<b>0.54%</b>

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

## Market Wrap Up

- The domestic equity indices ended with decent gains today, extending their rally for the third consecutive session, led by metal and PSU bank stocks. Meanwhile, IT shares lagged amid persistent AI-related uncertainties, which capped broader gains. The Nifty ended above the 25,800 level.
- The S&P BSE Sensex jumped 283.29 points or 0.34% to 83,734.25. The Nifty 50 index rallied 93.95 points or 0.37% to 25,819.35. In the three consecutive trading sessions, Sensex and Nifty jumped 1.34% and 1.37%, respectively.
- The BSE 150 MidCap Index climbed 0.50% and the BSE 250 SmallCap Index rose 0.39%.
- Among the sectoral indices, the Nifty Metal index (up 1.33%), the Nifty PSU Bank index (up 1.31%) and the Nifty FMCG index (up 1.21%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.23%), Nifty Pharma index (up 0.21%) and the Nifty Media index (up 0.24%) 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 **4701** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **RELIANCE, LT, BHARTIARTL, SBIN, BAJFINANCE**.
- **Short** position build up for the **February** series has been witnessed in **ICICIBANK, HDFCBANK, INFY**.
- **Unwinding** position for the **February** series has been witnessed in **ONGC, COFORGE**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	61550.80	61174.00	0.62%
NIFTY AUTO	28327.60	28174.55	0.54%
NIFTY FMCG	52406.50	51778.30	1.21%
NIFTY IT	32668.30	33075.05	-1.23%
NIFTY METAL	11985.75	11828.40	1.33%
NIFTY PHARMA	22541.95	22494.90	0.21%
NIFTY REALTY	839.30	834.15	0.62%
BSE CG	70104.62	69483.84	0.89%
BSE CD	59913.24	59853.33	0.10%
BSE Oil & GAS	29070.71	28891.78	0.62%
BSE POWER	6908.32	6878.38	0.44%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	57143.84	56566.49	1.02%
HANG SENG	CLOSED	CLOSED	-
STRAITS TIMES	CLOSED	CLOSED	-
SHANGHAI	CLOSED	CLOSED	-
KOSPI	CLOSED	CLOSED	-
JAKARTA	8310.23	8212.27	1.19%
TAIWAN	CLOSED	CLOSED	-
KLSE COMPOSITE	CLOSED	CLOSED	-
ALL ORDINARIES	9238.70	9182.50	0.61%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	92768.41	95690.63
NSE F&O	204760.25	203827.49

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1154.34
NET SELL	-

(Source: [NSE](#))

## Corporate News

- **Larsen & Toubro** announced a proposed venture under the India AI Mission to build sovereign, scalable GW-scale NVIDIA AI factory infrastructure to reinforce India's position as a global AI powerhouse.
- **Bharat Heavy Electricals** has announced that it has received a Letter of Acceptance from Steel Authority of India (SAIL) for executing a Captive Power Plant (CPP) package. The order is considered significant for the industry and is valued in the range of Rs 1,200 crore to Rs 1,500 crore.
- **Bharti Airtel** announced that its subsidiary, Airtel Money, has received a Certificate of Registration from the Reserve Bank of India (RBI) to operate as a Type II Non-Deposit Accepting Non-Banking Financial Company [Type II-NBFC-ND (ICC)].
- The National Payments Corporation of India has teamed up with **NVIDIA** in a dynamic collaboration that promises to elevate the nation's payment systems through the power of advanced AI. Targeting the construction of a strong and secure AI framework, this venture will enable expansive real-time payment processes while adhering to the principles of regulatory and data sovereignty.
- **E2E Networks** has issued a clarification to the National Stock Exchange stating that reports on its collaboration with NVIDIA do not relate to any new or recently concluded commercial arrangement.
- **Netweb Technologies India** launched artificial intelligence (AI) supercomputing systems, Tyrone Camarero Spark and Tyrone Supercomputing Systems powered by NVIDIA Sovereign AI Development.
- **Adani Ports and Special Economic Zone Ltd** signed an MoU with France's Port of Marseille Fos to expand cooperation in trade facilitation, port innovation and energy transition. The partnership proposes setting up an IMEC Ports Club to improve coordination among ports along the India-Middle East-Europe Economic Corridor route and strengthen connectivity between India and the European Union.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HDFCLIFE	729.60	705.80	3.37%
TATASTEEL	209.03	203.08	2.93%
ITC	332.45	325.45	2.15%
TATACONSUM	1169.70	1148.50	1.85%
BAJAJ-AUTO	9980.00	9826.50	1.56%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ONGC	264.60	271.85	-2.67%
WIPRO	211.95	215.69	-1.73%
ETERNAL	277.35	281.50	-1.47%
ADANIENT	2211.20	2242.90	-1.41%
INFY	1373.70	1391.20	-1.26%

(Source: [Moneycontrol](#))

- **Power Mech Projects** secured multiple domestic orders worth Rs 1,005 crore from subsidiaries of Adani Power.

- **BHEL** has received a power plant project worth Rs 1,200-1,500 crore from Steel Authority of India Ltd (SAIL).
- **Dr Reddy's Laboratories** is set to launch a generic version of the popular weight-loss drug Wegovy. The company aims to offer it at a price up to 60% lower than the original. This move comes as the patent for semaglutide, the active ingredient, is set to expire.
- **Adani Green Energy** has announced that its wholly-owned subsidiary, Adani Renewable Energy Holding Eleven (AREH11L), has incorporated a new wholly-owned subsidiary, Skyspin Energy, on 17 February 2026.
- **Aurionpro Solutions** announced that it has bagged a significant order from a reputed global data centre developer and operator.
- **Dilip Buildcon** announced that it has emerged as the lowest (L-1) bidder for a major infrastructure project in Gujarat.

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

## Global News

- U.K. consumer price inflation eased to 3.0% in January 2026, down from 3.4% in December. Core inflation declined to 3.1% in January, its lowest level since August 2021. On a monthly basis, consumer prices fell by 0.5%, reversing a 0.4% increase recorded in December.
- U.K. factory gate prices rose 2.5% year-on-year in January 2026, easing from a downwardly revised 3.1% increase in December. On a monthly basis, producer output prices were unchanged, following a 0.1% fall in December.
- France's annual inflation rate eased to 0.3% in January 2026, down from 0.8% in December. On a monthly basis, consumer prices declined 0.3% after rising 0.1% in December.
- Japan posted a seasonally adjusted merchandise trade deficit of 1.152 trillion yen in January, following the 113.5 billion yen surplus in December. Exports jumped 16.8% on year to 9.187 trillion yen, following the 5.1% gain in the previous month. Imports slipped an annual 2.5% to 10.340 trillion yen, following the 5.2% increase a month earlier.

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

## Economic News

- Crude Oil traded at US\$ 63.13/bbl (IST 17:00).
- INR strengthened to Rs. 90.68 from Rs. 90.69 against each US\$ resulting in daily change of 0.01%.
- India's oilmeal exports saw a significant drop of 42% in January. Shipments of soyabean meal and rapeseed meal plunged, impacting the overall figures. Ricebran extraction, however, showed a surge. This decline affects animal feed supplies. Key buyers include China, South Korea, Bangladesh, and Germany. Processors awaited new crop supplies for rapeseed meal.
- A member of the Indian Rice Exporters Federation (IREF) has entered into a commercial agreement to supply 5,000 tonnes of basmati rice to a buyer in the US. The federation said that this is a significant development as it comes after the finalisation of India-US trade deal, under which America has agreed to reduce reciprocal tariffs on Indian goods to 18% from the present 25%.
- Gold prices rose nearly 25% year-on-year to \$94,554 per kg during April-December, leading to cautious buying. Import volumes fell 18.3% to 522 tonnes. However, due to higher prices, the total import bill still rose 1.8% to \$49.4 billion.

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

## Forthcoming Events

### Board Meetings as on 19/02/2026

ABB India Limited	Financial Results/Dividend
CIE Automotive India Limited	Financial Results/Dividend

(Source: NSE)

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