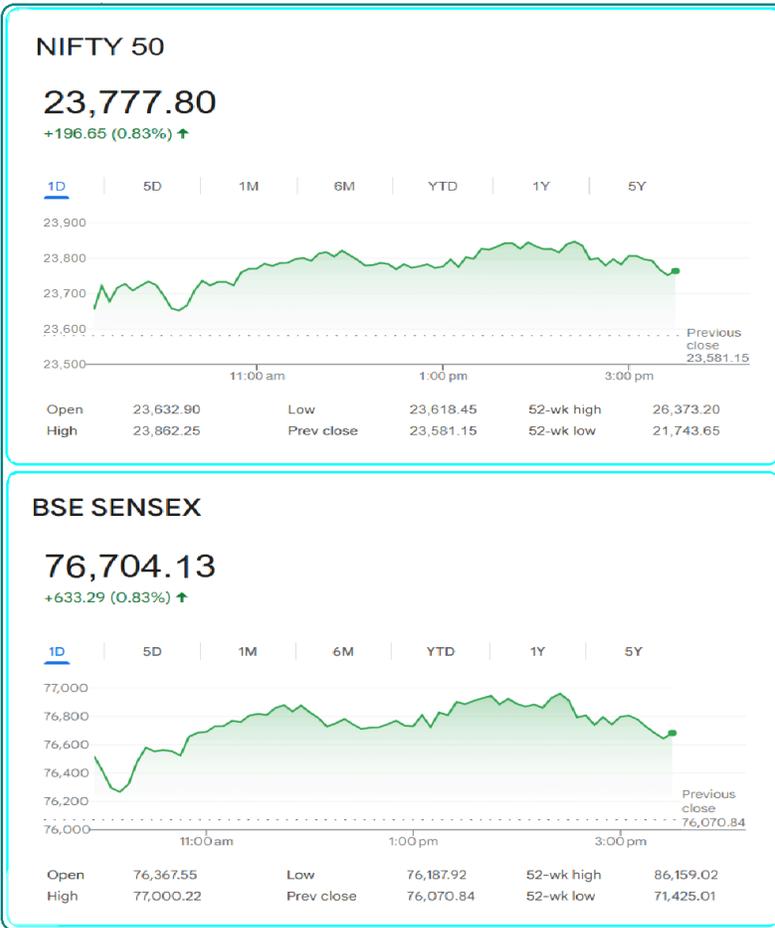


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23777.80	23581.15	0.83%
S&P BSE SENSEX	76704.13	76070.84	0.83%
NIFTY MID100	56289.85	55174.40	2.02%
NIFTY SML100	16179.15	15912.90	1.67%

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

Market Wrap Up

- Domestic equity benchmarks ended with strong gains, extending their rally for the third consecutive session, despite the ongoing Middle East conflict that kept investors cautious. The market opened in positive territory and extended its gains during the session, with the Nifty surging above the 23,800 level. However, the index witnessed mild profit booking in the latter half of the session and settled above the 23,750 mark. Investors now await the U.S. Federal Reserve's policy decision, due later today.
- The S&P BSE Sensex jumped 633.29 points or 0.83% to 76,704.13. The Nifty 50 index surged 196.65 points or 0.83% to 23,777.80. In three consecutive trading sessions, the Sensex and Nifty climbed 2.87% and 2.71% respectively. The BSE 150 MidCap Index soared 1.80% and the BSE 250 SmallCap Index rallied 2.05%. Among the sectoral indices, the Nifty Media index (up 3.35%), the Nifty IT index (up 2.78%) and the Nifty Realty index (up 2.75%) outperformed the Nifty 50 index. Meanwhile, the Nifty Metal index (down 0.10%), Nifty FMCG index (down 0.05%) and the Nifty Pharma index (up 0.16%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **March** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **9348** contracts at the end of the day.
- Long** position build up for the **March** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, INFY**.
- Short** position build up for the **March** series has been witnessed in **HDFCBANK, VEDL**.
- Unwinding** position for the **March** series has been witnessed in **LT, ADANI PORTS, ADANI ENT**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55326.05	54876.00	0.82%
NIFTY AUTO	25598.85	25117.10	1.92%
NIFTY FMCG	48079.00	48104.45	-0.05%
NIFTY IT	29559.30	28760.90	2.78%
NIFTY METAL	11625.45	11637.35	-0.10%
NIFTY PHARMA	22632.60	22597.55	0.16%
NIFTY REALTY	730.80	711.25	2.75%
BSE CG	69213.42	67943.61	1.87%
BSE CD	56258.44	55509.82	1.35%
BSE Oil & GAS	26484.18	26278.18	0.78%
BSE POWER	6973.02	6944.51	0.41%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	55239.40	53700.39	2.87%
HANG SENG	26025.42	25868.54	0.61%
STRAITS TIMES	5002.17	4935.97	1.34%
SHANGHAI	4062.98	4049.91	0.32%
KOSPI	5925.03	5640.48	5.04%
JAKARTA	CLOSED	7106.84	-
TAIWAN	34348.58	33836.57	1.51%
KLSE COMPOSITE	1729.81	1710.99	1.10%
ALL ORDINARIES	8847.70	8819.40	0.32%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	107541.69	107083.39
NSE F&O	175126.71	226125.88

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2714.35

(Source: [NSE](#))

Corporate News

- The National Company Law Tribunal (NCLT) has approved the acquisition of **Jaiprakash Associates Ltd** by **Adani Enterprises**, clearing the way for one of the most high-profile resolutions under India's insolvency framework. The approval will allow Adani Enterprises to take control of the debt-laden infrastructure and cement company.
- **Mankind Pharma** announced that it has acquired the Rivotril brand from Roche for the Indian market, with exclusive rights to manufacture, market and distribute the product across the country.
- **BEML** has received a letter of intent for design, manufacture, supply, testing, and commissioning of Standard Gauge Metro Rolling Stock for African region. The order comprises of stainless-steel standard gauge metro rolling stock valuing of approximately USD 60 million. This is the first ever overseas order secured by BEML for supply of metro rolling stock.
- **HCL Technologies** has been named an official launch partner for the AWS European Sovereign Cloud (ESC), a new independent cloud for Europe launched in the State of Brandenburg, Germany.
- **Hexaware Technologies** announced the launch of Agentverse, an enterprise AI agent platform designed to accelerate the adoption of agentic AI across business and technology operations.
- **CESC** said that it has awarded contracts for procurement of 600 MW of wind-solar hybrid power on a long-term basis to four domestic entities.
- **Tata Steel** has signed a Memorandum of Understanding (MoU) with University of Science and Technology Beijing (USTB) to collaborate on the development of low-carbon steelmaking technologies.
- **Shipping Corporation of India** has executed a shipbuilding contract with Mazagon Dock Shipbuilders (MDL) for the construction of one 3,000 DWT methanol dual-fuel Platform Supply Vessel (PSV).

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	248.20	237.60	4.46%
ETERNAL	242.54	234.63	3.37%
TECHM	1385.20	1341.80	3.23%
INFY	1267.10	1232.90	2.77%
M&M	3214.60	3128.90	2.74%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	455.20	462.25	-1.53%
NTPC	378.50	383.35	-1.27%
HINDUNILVR	2135.30	2158.20	-1.06%
CIPLA	1268.50	1281.90	-1.05%
SUNPHARMA	1778.30	1794.40	-0.90%

(Source: [Moneycontrol](#))

- Pearson and **Tata Consultancy Services** have announced a multi-year integrated partnership to help enterprises build future-ready workforces with AI-powered learning and assessment.
- **Bondada Engineering** has secured an order from Bharat Electronics (BEL) for the supply of critical components for defence applications. The contract, valued at Rs 35,70,000, will be executed within three months from the receipt of the work order.
- **Ceigall India** said it has secured two contracts from the Punjab Infrastructure Development Board for the construction and development of world-class urban streets in Ludhiana under the Hybrid Annuity Model (HAM).
- **Aurobindo Pharma** announced that the United States Food and Drug Administration (US FDA) has concluded an inspection at its subsidiary, Eugia Pharma's Bhiwadi facility, classifying it as Official Action Indicated (OAI).

- **Bharat Biotech** is developing novel vaccines to combat antimicrobial resistance (AMR), a significant global health threat. The company aims to administer these vaccines pre-surgery to prevent hospital-acquired infections, addressing a growing need due to rising drug resistance.
- **Strides Pharma Science** announced the acquisition of multiple generic brands from Sandoz for its Africa business.
- **Fractal Analytics** announced the launch of its new enterprise-grade generative AI platform, 'LLM Studio', signalling its deeper push into scalable AI solutions for businesses.
- **Mafatlal Industries** announced that it has received an order valued at approximately Rs 114 crore from the Odisha Computer Application Centre (OCAC).
- **KPI Green Energy** said it has secured a total funding sanction of Rs 979 crore from Canara Bank to finance its 150 MW wind power project in Gujarat under the Independent Power Producer (IPP) segment.
- **Axis Solutions** announced that it has secured its first significant order worth Rs 4.25 crore for the supply of high voltage transducers from **Bharat Heavy Electricals**.
- **Centrum Capital** has completed the sale of its entire stake in Centrum Housing Finance (CHFL) on 18 March 2026. With this, CHFL has ceased to be subsidiary of the company.
- **Axis Bank** will invest Rs 1,500 crore into Axis Finance by March 2027. This cash infusion follows a strategic review after plans to sell a stake were paused. The bank is reassessing its approach to the non-bank finance company. Axis Finance has shown consistent growth in recent years. A revised growth plan will be presented soon.

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

Global News

- U.S. private employers added an average of 9,000 jobs per week in the four weeks ending February 28, 2026, a notable decline from the revised 14,750 jobs per week in the prior period.
- U.S. pending home sales increased by 1.8% month-over-month in February 2026.
- Eurozone annual inflation rate was confirmed at 1.9% in February 2026, up from January's 16-month low of 1.7%. Core inflation increased to 2.4%, rebounding from January's more than four-year low of 2.2%. The CPI increased 0.6% month-over-month in February 2026, rebounding from a 0.6% fall in the previous month.
- Japan's trade surplus plunged to JPY 57.3 billion in February 2026 from JPY 559.2 billion a year earlier. Exports rose 4.2% year-on-year to JPY 9,571.6 billion, easing markedly from a 16.8% surge in January while imports jumped 10.2% to JPY 9,514.3 billion, rebounding from a 2.6% decline in January.

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

Economic News

- Crude Oil traded at US\$ 94.51/bbl (IST 17:00).
- INR weakened to Rs. 92.64 from Rs. 92.38 against each US\$ resulting in daily change of 0.28%.
- Parliament has approved a significant Rs 2.01 lakh crore in additional spending for the current fiscal year. The Rajya Sabha returned the Appropriation Bill 2026 to the Lok Sabha after Finance Minister Nirmala Sitharaman's reply. This approval allows the government to meet its financial obligations and fund various initiatives.
- Around 3 lakh tonnes of LPG aboard six Indian ships remain stranded in the Strait of Hormuz, even as one vessel, Nanda Devi, has reached Kandla Port and begun unloading. A total of 22 Indian vessels are currently in the region, carrying LPG, LNG, crude oil and other cargo. Authorities said ports are monitoring the situation and providing support, including extra storage.
- American manufacturing faces challenges due to President Trump's tariffs. Businesses report increased costs and reduced workforces. While the administration cites potential future benefits, current evidence suggests a negative impact. Tariff uncertainty deters investment, and global trade imbalances persist. This situation affects smaller companies significantly.
- India's telecom regulator, TRAI, is taking steps to combat spam calls. New proposals include charging businesses for commercial calls. Telecom companies will also be allowed to use AI for detecting and acting against spammers. Entities using automated calling systems must declare their use. TRAI is also strengthening rules on customer consent for promotional messages and calls.

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

Forthcoming Events

Board Meetings as on 19/03/2026

Indian Renewable Energy Development Agency Limited	Fund Raising
Samvardhana Motherson International Limited	Dividend
Vardhman Polytex Limited	Fund Raising

(Source: NSE)

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