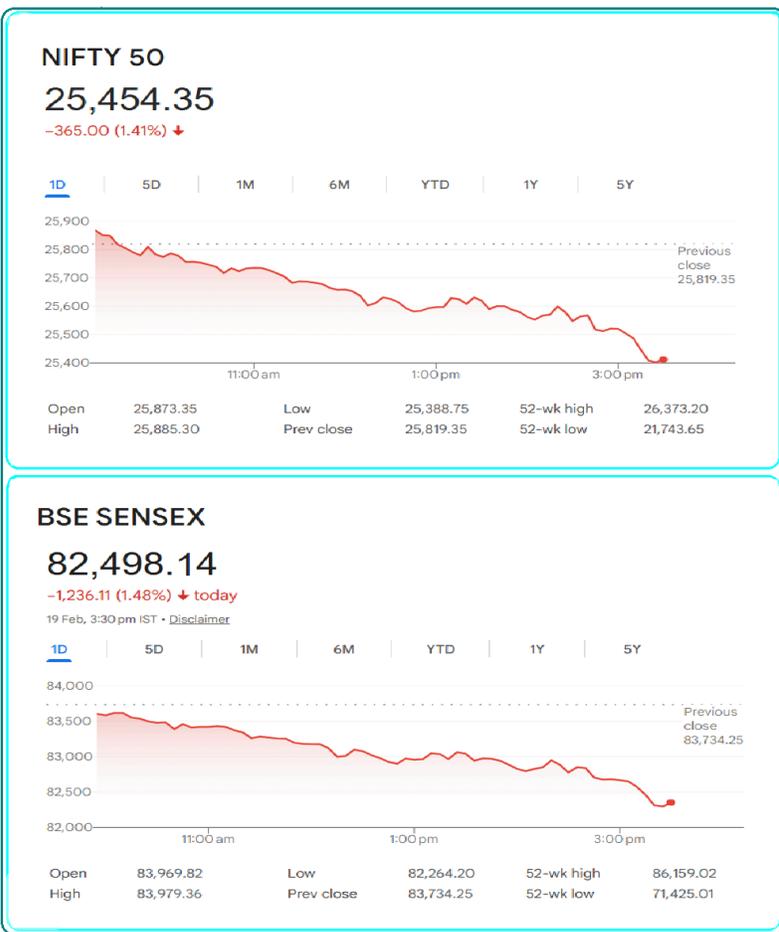


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25454.35	25819.35	-1.41%
S&P BSE SENSEX	82498.14	83734.25	-1.48%
NIFTY MID100	59227.65	60183.20	-1.59%
NIFTY SML100	17020.35	17239.25	-1.27%

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

Market Wrap Up

- The domestic equity indices ended with major losses, snapping a three-day winning streak, as a surge in crude oil prices, mixed signals from the Fed, and profit booking across sectors weighed on sentiment. The Nifty ended below the 25,500 level.
- The S&P BSE Sensex tanked 1,236.11 points or 1.48% to 82,498.14. The Nifty 50 index fell 365 points or 1.41%, to 25,454.35.
- The BSE 150 MidCap Index slipped 1.54% and the BSE 250 SmallCap Index fell 1.16%.
- Among the sectoral indices, the Nifty Chemical index (down 0.46%), the Nifty Pharma index (down 0.50%) and the Nifty Oil & Gas index (down 1.02%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 2.56%), Nifty Media index (up 2.23%) and the Nifty Auto index (down 2.10%) the underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **February** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **5871** contracts at the end of the day.
- **Long** position build up for the **February** series has been witnessed in **ONGC, HDFCLIFE**.
- **Short** position build up for the **February** series has been witnessed in **RELIANCE, LT, BHARTIARTL, ICICIBANK, HDFCBANK**.
- **Unwinding** position for the **February** series has been witnessed in **INFY, HINDUNILVR**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	60739.55	61550.80	-1.32%
NIFTY AUTO	27734.00	28327.60	-2.10%
NIFTY FMCG	51483.60	52406.50	-1.76%
NIFTY IT	32319.40	32668.30	-1.07%
NIFTY METAL	11842.40	11985.75	-1.20%
NIFTY PHARMA	22429.10	22541.95	-0.50%
NIFTY REALTY	817.85	839.30	-2.56%
BSE CG	68578.35	70104.62	-2.18%
BSE CD	58862.47	59913.24	-1.75%
BSE Oil & GAS	28846.48	29070.71	-0.77%
BSE POWER	6754.91	6908.32	-2.22%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	57467.83	57143.84	0.57%
HANG SENG	CLOSED	CLOSED	-
STRAITS TIMES	5001.56	4938.58	1.28%
SHANGHAI	CLOSED	CLOSED	-
KOSPI	5677.25	5507.01	3.09%
JAKARTA	8274.08	8310.23	-0.44%
TAIWAN	CLOSED	CLOSED	-
KLSE COMPOSITE	1752.11	1741.26	0.62%
ALL ORDINARIES	9316.60	9238.70	0.84%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	93811.52	92768.41
NSE F&O	409289.95	204760.25

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	880.49

(Source: [NSE](#))

Corporate News

- **Bharat Petroleum** and HREL have bought Venezuelan crude oil. This marks Bharat Petroleum's first purchase and HREL's first in two years. The deals aim to diversify India's oil supply. Refiners are reducing Russian oil imports. This move supports India's trade relations. Venezuelan oil exports to the US are also expected to increase.
- **Dr Reddy's Laboratories** is set to launch a generic version of semaglutide in India on March 21. The company plans to offer both oral and injectable formats at competitive prices. This move aims to increase access to the popular weight-loss and diabetes molecule.
- **Dr. Reddy's Laboratories** said that it has entered into a definitive agreement with Mercury Pharma Group (MPGL) to acquire its trademarks, Progynova and Cyclo Progynova and related assets for India.
- **Hindustan Unilever** is investing up to Rs 2,000 crore over the next two years. This investment will expand manufacturing capacity for premium beauty and home care products. The company is focusing on fewer, bigger bets in high-growth areas. Advanced automation and digital technologies will power the expansion. This will help HUL serve emerging retail channels and new product formats faster.
- **INOXGFL Group** has won the bid to acquire Wind World India's independent power producer (IPP) and operations & maintenance (O&M) businesses through an NCLT-monitored process, according to Inox Green Energy Services.
- **Waaree Energies** will establish India's largest integrated lithium-ion battery gigafactory in Andhra Pradesh. The project, costing Rs 8,175 crore, will be located in Rambilli, Anakapalli district. This facility will manufacture battery cells, packs, and large-scale Battery Energy Storage Systems. It is expected to create 3,000 direct jobs.
- **Zydus Lifesciences** has introduced Anyra, its first indigenously developed biosimilar for the treatment of visual impairment in India. This innovative drug, akin to Aflibercept 2 mg, addresses vision loss resulting from diseases like diabetes.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ONGC	274.65	264.60	3.80%
HINDALCO	905.65	899.25	0.71%
HDFCLIFE	733.15	729.60	0.49%
DRREDDY	1282.30	1280.30	0.16%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	4815.10	4980.40	-3.32%
TRENT	4067.90	4187.20	-2.85%
M&M	3431.80	3530.50	-2.80%
ULTRACEMCO	12688.00	13052.00	-2.79%
BEL	435.35	447.70	-2.76%

(Source: [Moneycontrol](#))

- **Tata Consultancy Services** announced a multi-dimensional strategic partnership with OpenAI to drive AI-powered innovation across enterprise, consumer, and social sectors.
- **Rail Vikas Nigam** received a letter of acceptance (LoA) from Northern Railway for a project worth Rs 1,201.35 crore.

- **Spicejet** said it has received a memorandum of understanding (MoU) for the induction of 10 aircraft, marking a fresh step in its capacity expansion and network rebuilding plans.
- **Ashok Leyland** announced that its step-down subsidiary, Ashok Leyland West Africa SA has been voluntarily liquidated.
- **Mahindra Holidays & Resorts India** announced the launch of Club Mahindra Nadiya Parao Resort in Jim Corbett, further strengthening its footprint in Uttarakhand.
- **B. L. Kashyap** and Sons has secured a contract worth Rs 300 crore from CRC Greens for a group housing project in Greater Noida, Uttar Pradesh.
- **Bharat Forge** signed memorandum of understanding (MoU) with VVDN Technologies, to explore a strategic collaboration across key technology-driven sectors.
- **ITCONS E-Solutions** has secured a domestic contract from Uranium Corporation of India (UCIL), which operates under the Department of Atomic Energy, PMO.

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

Global News

- U.S. durable goods orders slumped by 1.4% in December after spiking by an upwardly revised 5.4% in November. Core durable goods orders increased by 0.9% in December after climbing by 0.4% in November.
- U.S. industrial production grew by 0.7% in January after rising by a downwardly revised 0.2% in December. Manufacturing output also climbed by 0.6% in January after coming in unchanged in December.
- U.S. housing starts spiked by 6.2% to an annual rate of 1.404 million in December after jumping by 3.9% to an annual rate of 1.322 million in November. Building permits jumped by 4.3% to an annual rate of 1.448 million in December after slumping by 1.6% to an annual rate of 1.388 million in November.
- Eurozone current account surplus narrowed significantly to EUR 34.6 billion in December 2025, down from EUR 45.9 billion in the same month a year earlier.
- Australia's unemployment rate came in at a seasonally adjusted 4.1% in January, that was unchanged from December. The Australian economy added 17,800 jobs last month - shy of forecasts for an increase of 20,000 following the addition of 65,200 jobs in the previous month.

- Japan's value of core machinery orders were up a seasonally adjusted 19.1% on month in December - coming in at 1,052.5 billion yen. That was following the 11.0% contraction in November. On a yearly basis, orders jumped 16.8% - after sinking 6.4% in the previous month.

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

Economic News

- Crude Oil traded at US\$ 65.99/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 Food Corporation of India (FCI) has signed a five-year Memorandum of Understanding with the World Food Programme (WFP) to supply 2 lakh tonnes of rice. This pact aims to combat global hunger and support humanitarian operations, reinforcing India's commitment to international food security and aiding vulnerable populations.
- EPFO has reinstated the option for certain subscribers to link their pension contributions to their full salary, benefiting those who had previously opted for higher contributions. The restoration follows confusion after the 2014 cap on pensionable salary. Eligible employees can now once again contribute based on their actual earnings, subject to their employer's agreement.
- Distillery capacity is growing faster than ethanol demand. Oil companies expect only a small rise in procurement for petrol blending. New plants will add to existing supply. This situation presents challenges for the ethanol sector. The 20% blending target limits how much more ethanol can be absorbed. Discussions on increasing this target have stalled.
- FMCG volume growth in urban markets edged up to 4.6% in 2025, surpassing rural growth which decelerated to 3.6%. This marks the first time urban markets have outpaced rural regions in sales growth for daily essentials. Industry executives anticipate overall FMCG growth to improve this year, projecting acceleration to around 5% by mid-2026.

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

Forthcoming Events

Board Meetings as on 20/02/2026

Dhunseri Ventures Limited	Dividend
JSW Infrastructure Limited	Fund Raising
Mcnally Bharat Engineering Company Limited	Financial Results
Suraj Estate Developers Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 20/02/2026

Alkem Laboratories Limited	Interim Dividend - Rs 43 Per Share
Cantabil Retail India Limited	Interim Dividend - Re 0.75 Per Share
Firstsource Solutions Limited	Interim Dividend - Rs 5.50 Per Share
India Nippon Electricals Limited	Interim Dividend - Rs 15.50 Per Share
Indian Railway Catering And Tourism Corporation Limited	Interim Dividend - Rs 3.50 Per Share
Info Edge (India) Limited	Interim Dividend - Rs 2.40 Per Share
Kirloskar Oil Engines Limited	Interim Dividend - Rs 2.50 Per Share
NCL Industries Limited	Interim Dividend - Rs 1.50 Per Share
Power Finance Corporation Limited	Interim Dividend - Rs 4 Per Share
PTC India Limited	Interim Dividend - Rs 3 Per Share
RACL Geartech Limited	Interim Dividend - Rs 1.50 Per Share
Rashtriya Chemicals and Fertilizers Limited	Interim Dividend - Re 1 Per Sh
Senco Gold Limited	Interim Dividend - Re 0.75 Per Share
SJVN Limited	Interim Dividend - Rs 1.15 Per Share
The Bombay Burmah Trading Corporation Limited	Interim Dividend - Rs 17 Per Share

(Source: NSE)

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