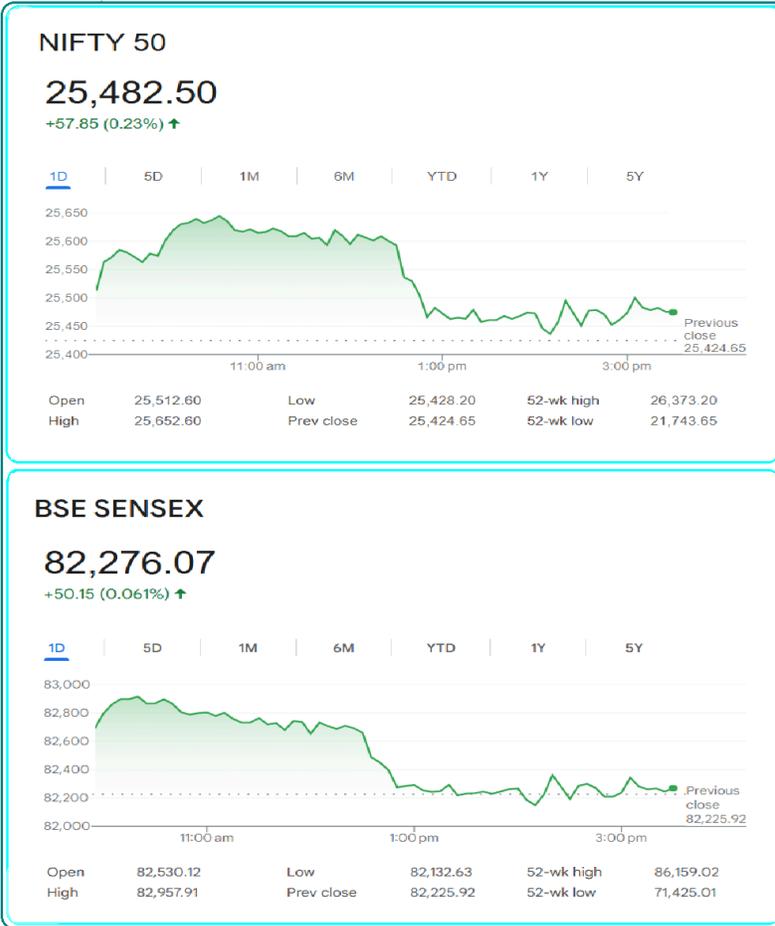


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	25482.50	25424.65	<b>0.23%</b>
<b>S&amp;P BSE SENSEX</b>	82276.07	82225.92	<b>0.06%</b>
<b>NIFTY MID100</b>	59406.10	59066.35	<b>0.58%</b>
<b>NIFTY SML100</b>	17118.70	16958.65	<b>0.94%</b>

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

## Market Wrap Up

- The key equity indices ended with modest gains today as positive cues from global markets lifted sentiment. Nifty ended above the 25,450 mark.
- The S&P BSE Sensex rose 50.15 points or 0.06% to 82,276.07. The Nifty 50 index gained 57.85 points or 0.23% to 25,482.50.
- The S&P BSE Mid-Cap index rallied 0.67% and the S&P BSE Small-Cap index added 0.48%.
- Among the sectoral indices, the Metal index (up 2.70%), the Nifty Pharma index (up 1.85%) and the Nifty Auto index (up 1.85%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 0.39%), the Nifty FMCG index (down 0.25%) and the Nifty Realty index (down 0.19%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **March** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **4813** contracts at the end of the day.
- **Long** position build up for the **March** series has been witnessed in **ICICIBANK, INFY**.
- **Short** position build up for the **March** series has been witnessed in **RELIANCE, BHARTIARTL, HDFCBANK**.
- **Unwinding** position for the **March** series has been witnessed in **TCS, BEL**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	61043.35	61047.30	-0.01%
NIFTY AUTO	28466.50	27950.00	1.85%
NIFTY FMCG	52105.30	52235.25	-0.25%
NIFTY IT	30526.35	30053.50	1.57%
NIFTY METAL	12399.40	12073.85	2.70%
NIFTY PHARMA	23051.85	22632.05	1.85%
NIFTY REALTY	796.85	798.35	-0.19%
BSE CG	70188.31	69999.43	0.27%
BSE CD	59299.44	59196.72	0.17%
BSE Oil & GAS	29300.37	29289.90	0.04%
BSE POWER	7017.27	7005.88	0.16%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	58583.12	57321.09	2.20%
HANG SENG	26765.72	26590.32	0.66%
STRAITS TIMES	5007.73	5020.79	-0.26%
SHANGHAI	4147.23	4117.41	0.72%
KOSPI	6083.86	5969.64	1.91%
JAKARTA	8322.23	8280.83	0.50%
TAIWAN	35413.07	34700.82	2.05%
KLSE COMPOSITE	1747.81	1754.01	-0.35%
ALL ORDINARIES	9359.00	9244.30	1.24%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	108503.78	113004.60
NSE F&O	164199.84	400790.45

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	2991.64
NET SELL	-

(Source: [NSE](#))

## Corporate News

- Larsen & Toubro** has secured a major order from India's Department of Atomic Energy to construct a Laser Interferometer Gravitational Wave Observatory (LIGO) in Aundha, Hingoli, Maharashtra. The project, valued between Rs. 1,000-2,500 crore.
- Tata Consultancy Services** has partnered with GitLab Inc., the intelligent orchestration platform for DevSecOps, to use intelligent orchestration and agentic AI automation to help enterprises accelerate innovation velocity at scale.
- Bharat Electronics** announced that it has secured additional orders worth Rs 733 crore since its last disclosure on 6 February 2026. The orders include TR modules, communication equipment, encryptors, radars, jammers, software solutions, test equipment, upgrades, and spares, further strengthening the company's defence electronics order book.
- H.G. Infra Engineering** said it has been declared the lowest bidder (L1) by the National Highways Authority of India (NHAI) for a road project in Odisha under the Hybrid Annuity Mode (HAM). The project involves construction from Gobindpur (NH-55) to Tangi near Bandola Toll Plaza (NH-16), covering a length of 40.33 km in Odisha under NH(O). The estimated project cost is Rs 1,827.33 crore.
- Rail Vikas Nigam** said that it has secured a domestic contract worth Rs 270.22 crore from Central Railway for execution of traction infrastructure works under an EPC model.
- Waaree Energies** anticipates no significant impact on its US orders despite new US import duties. The company is expanding its US manufacturing capacity to 4.2 GW by year-end. This expansion is expected to support existing US commitments and cushion the effect of the trade measures. The US Commerce Department imposed preliminary duties on solar imports from India, Indonesia, and Laos.
- Dr Reddy's Laboratories** is poised to launch its generic semaglutide injection, potentially named Obeda, in India by March. This move anticipates the March 2026 patent expiry for the active ingredient in Novo Nordisk's Ozempic and Wegovy. The Indian drugmaker plans competitive pricing, aiming to capture a significant share of the

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1378.20	1339.20	2.91%
BAJAJ-AUTO	10097.00	9829.00	2.73%
TATASTEEL	214.64	209.13	2.63%
SHRIRAMFIN	1085.90	1061.70	2.28%
ADANIENT	2231.70	2183.00	2.23%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
RELIANCE	1398.50	1428.80	-2.12%
SBIN	1200.10	1223.30	-1.90%
ADANIPOINTS	1528.70	1555.40	-1.72%
ETERNAL	250.20	254.00	-1.50%
BHARTIARTL	1913.40	1941.00	-1.42%

(Source: [Moneycontrol](#))

- **Larsen & Toubro** said its Power Transmission & Distribution (PT&D) vertical has secured 'major' EPC orders to establish electricity grid system elements in India and overseas. The order has been classified as 'major,' indicating a value in the range of Rs 5,000 crore to Rs 10,000 crore.
- **Tata Power** said that the University of Warwick has signed a Memorandum of Understanding with the company, to deliver research and innovation in grid modernization, fast charging, power storage, industrial decarbonisation, digital energy systems, optimisation and advanced manufacturing approaches.
- Univastu India said that it has received a letter of acceptance (LoA) worth Rs 485.67 crore from **IRCON International** for works on Mumbai Metro Line 6 (Swami Samarth Nagar to Vikhroli-EEH).
- **Coforge** announced that it has been awarded a \$158 million five-year contract by a UK based client.

growing diabetes and obesity market.

- **Lupin** has received approval from the U.S. FDA for its Abbreviated New Drug Application (ANDA) for Brivaracetam Oral Solution 10 mg/mL. Brivaracetam is the bioequivalent to Briviact® Oral Solution, 10 mg/mL, of UCB, Inc. and is indicated for the treatment of partial-onset seizures in patients 1 month of age and older.
- **Biocon** said that it has received approval from the United States Food and Drug Administration (U.S. FDA) for its complex formulation Liraglutide Injection.
- **Maruti Suzuki's** Gujarat railway siding has set a new global benchmark, becoming the first modal shift transportation project in the world to earn carbon credits. By moving vehicle dispatches from road to rail, the company is cutting emissions through a cleaner, more efficient logistics route.
- South Eastern Coalfields Ltd (SECL), a subsidiary of **Coal India Ltd**, has identified seven mine dumps for potential extraction of rare earth elements.
- US oil giant Chevron has made its first sale of Venezuelan crude oil to India's **Reliance Industries**. This marks the first time in about six years that Reliance has purchased Boscan crude, a heavy oil used in asphalt production. The deal was negotiated this month, signifying a notable development in oil trade between the two nations.
- **Tata Steel's** new manufacturing plant in Ludhiana will begin operations in March. This significant project represents a major boost for Punjab's industrial growth. The plant, a substantial investment by Tata Steel, will create employment for approximately 2,500 people. It will utilize environmentally friendly Electric Arc Furnace technology. The project is spread over 115 acres. The initial investment of Rs 2,600 crore has now increased to Rs 3,200 crore.

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

## Global News

- U.S. private employers added an average of 12,750 jobs per week in the four weeks ending February 7, 2026, up from a revised 11,500 in the previous period.
- U.S. house prices increased 0.1% in December 2025, following an upwardly revised 0.7% rise in November. Year-over-year, home values were up 1.8% between Q4 2024 and Q4 2025.
- U.S. Conference Board said its consumer confidence index rose to 91.2 in February from an upwardly revised 89.0 in January.
- U.S. wholesale inventories increased 0.2% in December.
- Eurozone annual inflation was confirmed at 1.7% in January 2026, down from 2.0% in December. Core inflation fell to 2.2%, its lowest level since October 2021.
- Germany's economy expanded by 0.3% in the fourth quarter of 2025, rebound from the stagnation recorded in the previous quarter. On an annual basis, the economy grew 0.4% in Q4, accelerating from 0.3% in Q3.
- Germany's GfK Consumer Climate Indicator dropped to -24.7 heading into March 2026 from a marginally revised -24.2 in the prior period.
- France's consumer confidence indicator came in at 91 in February 2026, slightly above market expectations and December's reading of 90.
- Australia's consumer prices were up a seasonally adjusted 3.8% on year in January, unchanged from the December reading following an upward revision from 3.6%. On a seasonally adjusted monthly basis, inflation rose 0.5%.
- Japan's producer prices were up 2.6% on year in January, unchanged from the December reading. On a monthly basis, producer prices slipped 0.5% following the flat reading in the previous month.

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

## Economic News

- Crude Oil traded at US\$ 65.35/bbl (IST 17:00).
- INR weakened to Rs. 90.96 from Rs. 90.96 against each US\$ resulting in daily change of 0.00%.
- Indian and European spice associations have agreed to work together on food safety and sustainability. This partnership aims to ensure Indian spices meet European Union standards. Both groups are committed to consumer health and ethical practices. They will share information and cooperate on regulations. This move is crucial for Indian spice exports to Europe.
- The government has permitted the export of 25 lakh tonnes of wheat, according to a commerce ministry notification.

While the overall export policy for wheat remains prohibited, this specific quantity has been allowed. The decision was made earlier this month, with detailed modalities to be announced separately.

- The US Commerce Department has set preliminary duties of 126% on solar imports from India, citing unfair manufacturing subsidies that allowed exporters to undercut US producers. It also proposed duties ranging from 86% to 143% on Indonesia and 81% on Laos on similar grounds.
- The Telecom Regulatory Authority of India (Trai) has slashed reserve prices of 5G spectrum by 7-37% across bands for the upcoming auctions while also recommending lower entry barriers for new players, in a bid to spur demand and boost sale proceeds.

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

## Forthcoming Events

### Board Meetings as on 26/02/2026

Engineers India Limited	Dividend
Vesuvius India Limited	Financial Results/Dividend
Oriental Trimex Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 26/02/2026

Angel One Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share
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(Source: NSE)

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