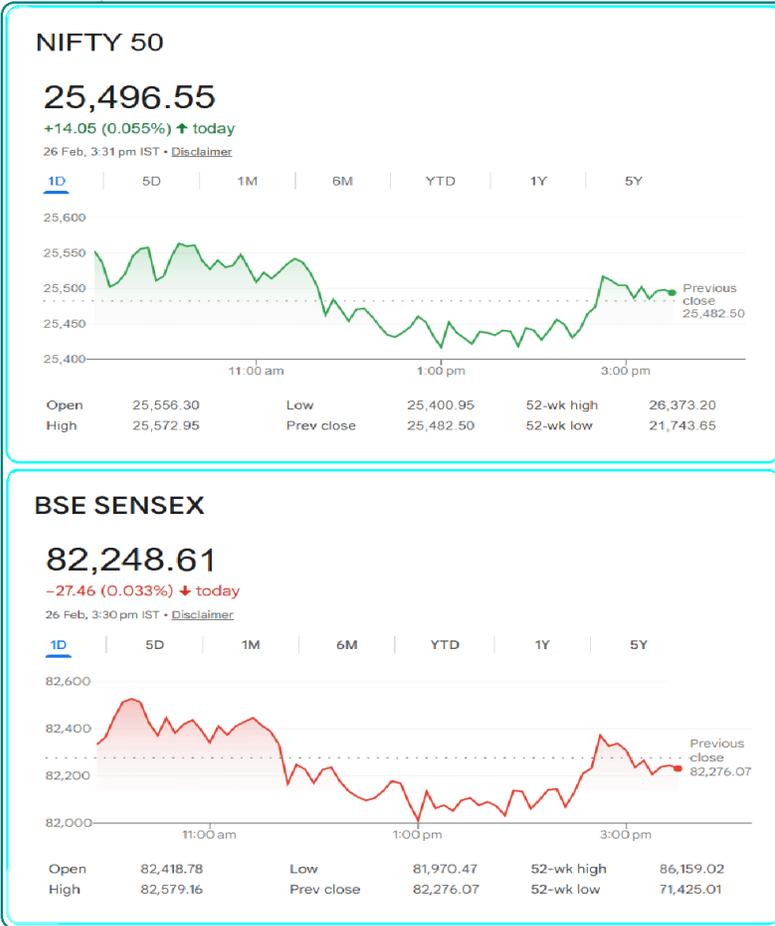


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|---------------|
| NIFTY 50 | 25496.55 | 25482.50 | 0.06% |
| S&P BSE SENSEX | 82248.61 | 82276.07 | -0.03% |
| NIFTY MID100 | 59798.15 | 59406.10 | 0.66% |
| NIFTY SML100 | 17117.65 | 17118.70 | -0.01% |

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

Market Wrap Up

- The key equity indices ended flat after a choppy session. The benchmarks opened strong on buying in IT and pharma shares but lost steam as profit-booking emerged. The Nifty briefly slipped into negative territory amid volatility surrounding the monthly F&O expiry before recovering marginally in the final hour to close little changed. Nifty ended near the 25,500 level.
- The S&P BSE Sensex shed 27.46 points or 0.03% to 82,248.61. The Nifty 50 index rose 14.05 points or 0.06% to 25,496.55.
- The S&P BSE Mid-Cap index rallied 0.55% and the S&P BSE Small-Cap index added 0.07%.
- Among the sectoral indices, the Healthcare index (up 1.24%), the Nifty Pharma index (up 1.08%) and the Nifty PSU Bank index (up 0.95%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 0.68%), the Nifty FMCG index (down 0.16%) and the Nifty Consumer Durables index (up 0.01%) 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 decreased by **2743** contracts at the end of the day.
- **Long** position build up for the **March** series has been witnessed in **RELIANCE, BHARTIARTL, ICICIBANK, INFY**.
- **Short** position build up for the **March** series has been witnessed in **HDFCBANK, BAJFINANCE, ETERNAL**.
- **Unwinding** position for the **March** series has been witnessed in **TECHM, PERSISTENT, BEL**.

(Source: Capitaline F&O)

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|---------------|----------|----------|-----------|
| NIFTY BANK | 61187.70 | 61043.35 | 0.24% |
| NIFTY AUTO | 28693.40 | 28466.50 | 0.80% |
| NIFTY FMCG | 52023.00 | 52105.30 | -0.16% |
| NIFTY IT | 30554.20 | 30526.35 | 0.09% |
| NIFTY METAL | 12448.00 | 12399.40 | 0.39% |
| NIFTY PHARMA | 23301.65 | 23051.85 | 1.08% |
| NIFTY REALTY | 798.65 | 796.85 | 0.23% |
| BSE CG | 70804.27 | 70188.31 | 0.88% |
| BSE CD | 59205.77 | 59299.44 | -0.16% |
| BSE Oil & GAS | 29602.43 | 29300.37 | 1.03% |
| BSE POWER | 7007.91 | 7017.27 | -0.13% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 58753.39 | 58583.12 | 0.29% |
| HANG SENG | 26381.02 | 26765.72 | -1.44% |
| STRAITS TIMES | 4964.38 | 5007.73 | -0.87% |
| SHANGHAI | 4146.63 | 4147.23 | -0.01% |
| KOSPI | 6307.27 | 6083.86 | 3.67% |
| JAKARTA | 8235.26 | 8322.23 | -1.05% |
| TAIWAN | 35414.49 | 35413.07 | 0.00% |
| KLSE COMPOSITE | 1740.97 | 1747.81 | -0.39% |
| ALL ORDINARIES | 9408.70 | 9359.00 | 0.53% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 108665.76 | 108503.78 |
| NSE F&O | 144557.45 | 164199.84 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|---------|
| NET BUY | - |
| NET SELL | 3465.99 |

(Source: [NSE](#))

Corporate News

- Apple is in talks with **ICICI Bank**, **HDFC Bank** and **Axis Bank**, along with Visa and Mastercard, to launch Apple Pay in India around mid-2026, though the timeline is not final. The service is expected to support UPI as well as card payments, entering a market dominated by Google Pay, PhonePe, Amazon Pay and Paytm.
- **Zydus Lifesciences** is set to launch a generic version of the weight-loss injection semaglutide next month. The drug will be available under brand names Semaglyn, Mashema, and Altreme. Zydus will offer a unique reusable pen for easier dosage adjustment. This move aims to simplify treatment for patients managing Type 2 diabetes and obesity.
- **Alembic Pharmaceuticals** has received final approval from the US Food & Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) Lamotrigine Orally Disintegrating Tablets USP, 25 mg, 50 mg, 100 mg and 200 mg. The approved ANDA is therapeutically equivalent to the reference listed drug product (RLD), Lamictal ODT Orally Disintegrating Tablets, 25 mg, 50 mg, 100 mg, and 200 mg, of GlaxoSmithKline LLC.
- **Indian Oil Corp**, **Bharat Petroleum Corp**, and **Hindustan Petroleum Corp** would together own 35% in the proposed joint venture with the Shipping Corporation of India. This new venture will acquire ships to transport crude oil and refined fuels. The goal is to reduce dependence on foreign vessels. This move aims to save India significant foreign exchange annually.
- **LTIMindtree** announced collaboration with NVIDIA to support the Central Board of Direct Taxes (CBDT) in modernizing India's national tax analytics platform under the Insight 2.0 initiative.
- **Coforge** announced a strategic partnership with VHC Health. Under the agreement, Coforge will serve as VHC Health's Digital and IT Services provider. This milestone marks Coforge's significant expansion in the healthcare provider market and strengthens its Provider Experience Management capabilities, reflecting a shared focus on delivering secure, reliable, and clinician focused digital infrastructure to support care delivery across the organization.

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| TMPV | 391.55 | 381.85 | 2.54% |
| EICHERMOT | 8190.00 | 8008.00 | 2.27% |
| BEL | 449.05 | 439.30 | 2.22% |
| MAXHEALTH | 1109.90 | 1088.10 | 2.00% |
| SHRIRAMFIN | 1104.60 | 1085.90 | 1.72% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| TRENT | 3856.00 | 3922.00 | -1.68% |
| ETERNAL | 246.50 | 250.20 | -1.48% |
| POWERGRID | 303.25 | 307.25 | -1.30% |
| COALINDIA | 433.50 | 438.60 | -1.16% |
| TATACONSUM | 1159.50 | 1172.30 | -1.09% |

(Source: [Moneycontrol](#))

- Aurobindo Pharma** announced that its wholly owned subsidiary, Eugia Pharma Specialities, has received final approval from the US Food & Drug Administration (USFDA) to manufacture and market Everolimus Tablets, 0.25 mg, 0.5 mg, 0.75 mg, 1 mg, which is bioequivalent and therapeutically equivalent to the reference listed drug (RLD), Zortress Tablets, 0.25 mg, 0.5 mg, 0.75 mg, 1 mg, of Novartis Pharmaceuticals Corp.
- Rail Vikas Nigam** has received letter of award from National Mineral Development Corporation (NMDC) for construction of residential towers at Iron Ore Deposit-5 at Bachel, Chhattisgarh. The project cost is Rs 796.80 crore.
- Tejas Networks** announced that it has signed an agreement with NEC Corporation to manufacture and supply 5G massive MIMO radios.
- NTPC Green Energy** announced that the first part capacity of 50 MW out of 200 MW Dayapar Wind Energy Project Phase-II located in Gujarat of NTPC Renewable Energy, a wholly owned subsidiary of NTPC Green Energy, is declared on Commercial Operation w.e.f. 00:00 hrs of 26 February 2026.
- Capacite Infraprojects** said that it has received a letter of intent (LOI) from TenX Realty (on behalf of Raymond) for a total contract value of approximately Rs 537 crore.
- Japan's Kubota Corp took majority control of **Escorts**, the merged entity-Escorts Kubota-is struggling to make tangible market share gains in an intensely competitive Indian tractor market. The country's fourth largest tractor maker trailed the broader industry's more than 20% growth last fiscal year. The company has lost ground consistently since the merger.
- KP Energy** received letter of award (LoA) from Enerparc Energy for the development of a 40.8 MW Wind-Solar Hybrid Power Project in Gujarat.
- Websol Energy System** secured three purchase orders aggregating 85.5 MW for the supply of solar modules, with a total contract value of Rs 172 crore.
- Yes Bank** has tightened security measures after detecting unusual transaction declines on its Multi-Currency Prepaid Forex Card issued with BookMyForex. Fraudulent attempts occurred at 15 Latin American merchants where two-factor authentication is not mandatory. Transactions worth \$0.28 million were approved for 5,000 customers, while 688 unauthorised attempts were blocked.
- Capillary Technologies India** has announced the acquisition of Session M Inc., a U.S.-based loyalty and customer engagement platform, from payments giant Mastercard Inc. in an all-cash deal valued at approximately \$20 million.
- Bharat Sanchar Nigam** reported consolidated net loss to Rs 1302.43 crore in the quarter ended December 2025 as against net profit of Rs 264.24 crore during the previous quarter ended December 2024. Sales rose 7.08% to Rs 5325.20 crore in the quarter ended December 2025 as against Rs 4973.05 crore during the previous quarter ended December 2024.
- Rail Vikas Nigam** has received LOA from National Mineral Development Corporation (NMDC) for construction of residential towers and shopping complex in Bachel, Chhattisgarh. The project cost is Rs 644.84 crore.

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

Global News

- Eurozone Economic Sentiment Indicator fell to 98.3 in February 2026, down from a three-year high of 99.3 in January. The consumer confidence was confirmed at -12.2 in February 2026, up from -12.4 in the prior month.
- Eurozone bank lending to households rose 3% year-on-year to EUR 7.156 trillion in January 2026. Lending to businesses decreased to 2.8% in January from 3%. Combined, overall credit growth to the private sector, covering both households and non-financial corporations, stood at 3.3%, unchanged from the previous month. M3 money supply climbed 3.3%, following a rise of 2.8% in December.

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

Economic News

- Crude Oil traded at US\$ 64.39/bbl (IST 17:00).
- INR strengthened to Rs. 90.92 from Rs. 90.96 against each US\$ resulting in daily change of 0.04%.
- The Indian Sugar & Bio-energy Manufacturers Association (ISMA) has lowered its 2025-26 sugar production forecast by 5.5% due to lower sugarcane yields in Uttar Pradesh and Maharashtra. Despite these challenges, net sugar production is still projected to be 12% higher than the previous year, with a significant portion diverted for ethanol production. India sugar output: The third advance estimate, released after an executive committee meeting, follows a second projection of 34.35 million tonnes. Output last year was 29.62 million tonnes.
- The Indian government is planning significant reforms for the fertiliser sector. These changes aim to simplify approval processes, reduce penalties for minor violations, and make regulations more sensible. This move is part of a broader effort to ease rules in a highly controlled industry. The government is seeking industry feedback to address compliance issues and legal hurdles.
- The Central Board of Indirect Taxes and Customs (CBIC) will launch single-window platform SWIFT 2.0, release the Digital Travellers Guide; and the revamped Atithi app.
- India and the European Union will hold technical discussions on the EU's Carbon Border Adjustment Mechanism. The mechanism will not have exceptions for any country, including India. This comes despite a new Free Trade Agreement between the two sides. India's carbon-intensive exports may face additional costs.
- The latest 'Flash Report on Central Sector Infrastructure Projects' showed that the revised cost of all 1,702 projects, each valued at Rs 150 crore or higher, monitored by the statistics ministry stood at Rs 39,24,534 crore compared to their original cost of Rs 33,71,816 crore.
- Telecom regulator TRAI is observing 5G network slicing's impact on net neutrality. Telecom operators want explicit permission for slicing, deeming it vital for 5G revenue. Network slicing creates virtual networks for customized services. Critics fear it violates net neutrality by allowing differentiated service quality. Operators argue slicing can coexist with

current rules, offering dedicated services without degrading general user experience.

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

Forthcoming Events

Board Meetings as on 27/02/2026

| | |
|----------------------------|-------------------|
| Rain Industries Limited | Financial Results |
| Bharat Electronics Limited | Dividend |
| EMS Limited | Fund Raising |

(Source: NSE)

Corporate Actions as on 27/02/2026

| | |
|---------------------------------|--------------------------------------|
| Dhunseri Ventures Limited | Interim Dividend - Rs 3.50 Per Share |
| InfoBeans Technologies Limited | Bonus 3:1 |
| Shreeji Shipping Global Limited | Interim Dividend - Re 1 Per Share |

(Source: NSE)

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