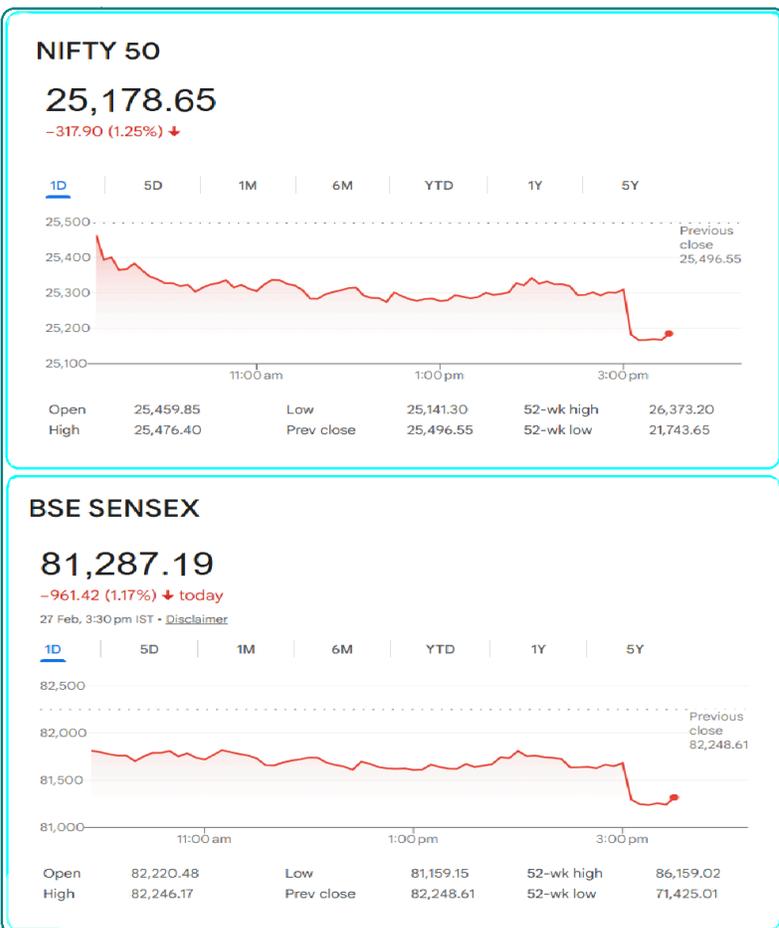


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25178.65	25496.55	-1.25%
S&P BSE SENSEX	81287.19	82248.61	-1.17%
NIFTY MID100	59115.60	59798.15	-1.14%
NIFTY SML100	16928.90	17117.65	-1.10%

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

Market Wrap Up

- The key equity indices ended sharply lower today, weighed down by sustained FII selling and soft global cues. Investor sentiment was further hit by rising tensions between Pakistan and Afghanistan, alongside unresolved US-Iran talks. Nifty closed below the 25,200 level, reflecting a cautious mood across the board.
- The S&P BSE Sensex tanked 961.42 points or 1.17% to 81,287.19. The Nifty 50 index dropped 317.90 points or 1.25% to 25,178.65.
- The S&P BSE Mid-Cap index tumbled 1.09% and the S&P BSE Small-Cap index slumped 0.86%.
- Among the sectoral indices, the Media index (up 0.60%), the Nifty Consumer Durables index (up 0.17%) and the Nifty IT index (up 0.16%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Realty index (down 2.26%), the Nifty Auto index (down 1.86%) and the Nifty FMCG index (down 1.69%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **March** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **19037** 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 **INFY, HCLTECH**.
- **Unwinding** position for the **March** series has been witnessed in **RVNL, CGPOWER**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	60529.00	61187.70	-1.08%
NIFTY AUTO	28158.85	28693.40	-1.86%
NIFTY FMCG	51142.20	52023.00	-1.69%
NIFTY IT	30603.85	30554.20	0.16%
NIFTY METAL	12240.65	12448.00	-1.67%
NIFTY PHARMA	22952.35	23301.65	-1.50%
NIFTY REALTY	780.60	798.65	-2.26%
BSE CG	70454.47	70804.27	-0.49%
BSE CD	59193.44	59205.77	-0.02%
BSE Oil & GAS	29595.66	29602.43	-0.02%
BSE POWER	6967.06	7007.91	-0.58%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	58850.27	58753.39	0.16%
HANG SENG	26630.54	26381.02	0.95%
STRAITS TIMES	4995.07	4964.38	0.62%
SHANGHAI	4162.88	4146.63	0.39%
KOSPI	6244.13	6307.27	-1.00%
JAKARTA	8235.49	8235.26	0.00%
TAIWAN	CLOSED	35414.49	-
KLSE COMPOSITE	1716.61	1740.97	-1.40%
ALL ORDINARIES	9435.60	9408.70	0.29%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	144962.74	108665.76
NSE F&O	184579.95	144557.45

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	7536.36

(Source: [NSE](#))

Corporate News

- Maruti Suzuki India** has partnered with the Tamil Nadu government to commission seven automated driving test tracks. This initiative completes the automation of all ten driving test tracks in the state. These tracks use high-definition cameras and advanced analytics for a fair and efficient driver licensing process.
- Lupin** said it has received an Establishment Inspection Report from the US Food and Drug Administration for its Goa-based manufacturing facility, with a Voluntary Action Indicated classification following a November 2025 inspection.
- GPT Infraprojects** announced that it has acquired 100% stake in Alcon Builders and Engineers (Alcon), foraying its entry into the high-margin signaling EPC segment.
- Mastek** announced that its wholly owned subsidiary, Mastek (UK) has secured a five-year engineering, integration, and product development contract from the UK's Home Office, with an overall budget of approximately euro 49 million (\$67 million).
- Gujarat Mineral Development Corporation** said that it has signed a memorandum of understanding (MoU) with NTPC to jointly explore opportunities in coal and lignite gasification and downstream utilisation.
- Fintech firm Zaggle Prepaid Ocean Services** has entered into multiple agreements to provide its corporate expense management solutions to leading domestic entities.
- Glenmark Pharmaceuticals** announced that its wholly owned subsidiary, Glenmark USA, will launch Sodium Phosphates Injection USP, 15 mM P/5 mL, 45 mM P/15 mL and 150 mM P/50 mL (3 mM P/mL) Single-Dose Vials.
- NBCC** will seek Supreme Court exemption from RERA registration for 11 of Supertech's 16 projects requiring fund infusion. The company plans to divert surplus cash and raise funds from financial institutions to complete the stalled housing projects, aiming for delivery within three years.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1389.10	1373.50	1.14%
TRENT	3899.50	3856.00	1.13%
INFY	1300.10	1289.10	0.85%
APOLLOHOSP	7821.50	7775.00	0.60%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SUNPHARMA	1737.00	1785.70	-2.73%
BHARTIARTL	1879.30	1929.60	-2.61%
HDFCLIFE	715.30	734.00	-2.55%
M&M	3397.40	3484.60	-2.50%
DRREDDY	1286.30	1319.30	-2.50%

(Source: [Moneycontrol](#))

- **Coal India** allays domestic coal deficiency situation even as the power demand began picking up since January, signalling that coal demand could go up in the ensuing months.
- **Bharat Petroleum Corporation** said that it has incorporated a wholly owned subsidiary, Bharat Petroleum Global Energy Services (Singapore) Pte to setting up trading desk in Singapore.
- **Jio Financial Services** said that it has subscribed to 3,35,71,923 equity shares of Rs 10 each of Jio Credit (JCL), a wholly owned subsidiary, for cash at a premium of Rs 585.70 per equity share, aggregating to Rs 1,999.88 crore.
- RBL Bank has announced that the Reserve Bank of India (RBI) has granted approval to **SBI Mutual Fund** to acquire an aggregate holding of up to 9.99% of the paid-up share capital or voting rights in the bank.
- **Dynacons Systems & Solutions** has secured a contract worth Rs 108.88 crore from Punjab & Sind Bank for the supply, implementation and management of on-premises private cloud infrastructure.
- **Dee Development Engineers** has secured a letter of intent (LoI) for manufacturing alloy steel seamless pipes at its new forged seamless pipe plant in Anjar, Gujarat.

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

Global News

- U.S. initial jobless claims rose to 212,000 in the week ended February 21st, an increase of 4,000 from the previous week's revised level of 208,000. Continuing claims fell by 31,000 to 1.833 million in the week ended February 14th.
- U.K. GfK Consumer Confidence Index fell to -19 in February 2026 from -16 in January.
- Germany's import prices fell by 2.3% year-on-year in January 2026, unchanged from December. On a monthly basis, import prices increased by 1.1% in January, rebounding from a 0.1% decline in December. source: Federal Statistical Office
- France's economy expanded 0.2% quarter-on-quarter in Q4 2025, easing from 0.5% in Q3 and confirming preliminary estimates. On an annual basis, GDP expanded 1.2%, higher than initial data of 1.1% and the strongest since Q1 2024, picking up from 1% in Q3.

- France's annual inflation rate accelerated to 1% in February 2026, up from 0.3% in January. Compared to the previous month, the CPI went up 0.7%, after a 0.3% gain in January.
- French domestic producer prices rose by 0.5% month-on-month in January 2026, following an upwardly revised 0.3% increase in the previous month. On an annual basis, the decline in producer prices intensified, dropping 2.3%, the sharpest since December 2024, compared with a 1.9% fall in December.
- French private payroll employment decreased by 0.1%, or 20,900 jobs, to 21.0 million in the fourth quarter of 2025, remaining unchanged from the previous quarter.
- Japan's retail sales spiked 1.8% on year in January - coming in at 12.954 trillion yen. That was following the 0.9% decline in December. On a seasonally adjusted monthly basis, retail sales jumped 4.1%.
- Japan's industrial production was up a seasonally adjusted 2.2% on month in January, following the 0.1% contraction in December. On a yearly basis, production was up 2.2%.

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

Economic News

- Crude Oil traded at US\$ 66.80/bbl (IST 17:00).
- INR weakened to Rs. 90.98 from Rs. 90.92 against each US\$ resulting in daily change of 0.07%.
- The Indian real gross domestic product expanded by 7.8% from the previous year in the December quarter of 2025, inching down from the upwardly revised, six-quarter high of 8.4% in the earlier period. With the reading, the GDP growth for FY2026 was revised higher to 7.6%, equalling the highest since FY2022.
- The RBI's recent liquidity infusion, which has pushed overnight rates below the repo rate to ease funding stress, is seen by bankers as a temporary, tactical move rather than a policy shift. With surplus liquidity rising above comfort levels and short-term rates cooling, the central bank is expected to maintain this stance only until March before likely absorbing excess cash and restoring its usual liquidity framework.

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

Forthcoming Events

Board Meetings as on 28/02/2026

BF Utilities Limited	Financial Results
5Paisa Capital Limited	Fund Raising
Mold-Tek Technologies Limited	Fund Raising

Board Meetings as on 02/03/2026

DCM Shriram Fine Chemicals Limited	Financial Results
Balkrishna Industries Limited	Fund Raising
Sheela Foam Limited	Dividend

(Source: NSE)

Corporate Actions as on 02/03/2026

Healthcare Global Enterprises Limited	Rights 1:17 @ Premium Rs 502/-
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(Source: NSE)

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