

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	75,311.06	74,893.45	74,907.04	74,387.44	74,454.41	- 856.65	- 1.14
NIFTY	22,795.90	22,609.35	22,668.05	22,518.80	22,553.35	- 242.55	- 1.06

INDICES END IN RED AMID GEO POLITICAL CONCERN

The 30-share BSE Sensex was down by 856.65 points or 1.14% to settle at 74,454.41 and the Nifty was down by 242.55 points or 1.06% to settle at 22,553.35. The BSE Mid-Cap was down by 0.78% and BSE Small Cap was down by 1.31%. On the sectoral front, Auto and FMCG were gaining indices; on the flip side, IT, Healthcare, Capital Goods, Realty, Metal, Oil & Gas Consumer Durables and Bank were losing indices. Mahindra & Mahindra, Kotak Bank, Maruti, Nestle and ITC were the top gainers on the Sensex; on the flip side, HCL Tech, Zomato, TCS, Infosys and Bharti Airtel were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a green note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
M&M	2,710.50	2,669.35	1.54
DRREDDY	1,164.90	1,151.80	1.14
EICHERMOT	5,016.65	4,962.45	1.09
HEROMOTO	3,884.00	3,852.60	0.82
NESTLEIND	2,225.00	2,214.95	0.45

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	295.00	306.35	-3.70
HCLTECH	1,642.75	1,700.70	-3.41
TCS	3,671.00	3,786.00	-3.04
INFY	1,763.00	1,815.00	-2.87
TATASTEEL	137.39	140.76	-2.39

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,03,46,823	1,677.00	1,730.33
M&M	61,67,313	2,710.50	1,657.95
ICICIBANK	1,15,22,480	1,219.70	1,402.93
INFY	75,94,720	1,763.00	1,341.78
TCS	25,08,516	3,671.00	928.45

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	2,51,93,205	137.39	349.81
BEL	1,54,09,569	256.60	393.28
POWERGRID	1,45,99,185	259.15	378.75
WIPRO	1,26,00,963	295.00	373.32
ICICIBANK	1,15,22,480	1,219.70	1,402.9



Indian equity markets faced selling pressure on Monday, with Nifty 50 settling below 22,600 mark, amid weak global cues and US tariff uncertainty weighed heavily on sentiments. Indices made a gap down opening as some concern came with Reserve Bank of India's (RBI) data showing that bank credit as well as deposits witnessed deceleration during the October-December quarter (Q3FY25) sequentially. In afternoon session, indices deepened their losses to trade near day's low point and remained lower till end of the day. Sentiments were downbeat as RBI said snapping the three-week rising streak, India's forex reserves dropped by \$2.54 billion to \$635.721 billion in the week ended February 14. Traders were cautious with US President Donald Trump's statement that his administration will soon impose reciprocal tariffs on countries such as India and China, reiterating what he had said during Prime Minister Narendra Modi's recent visit to the US capital.

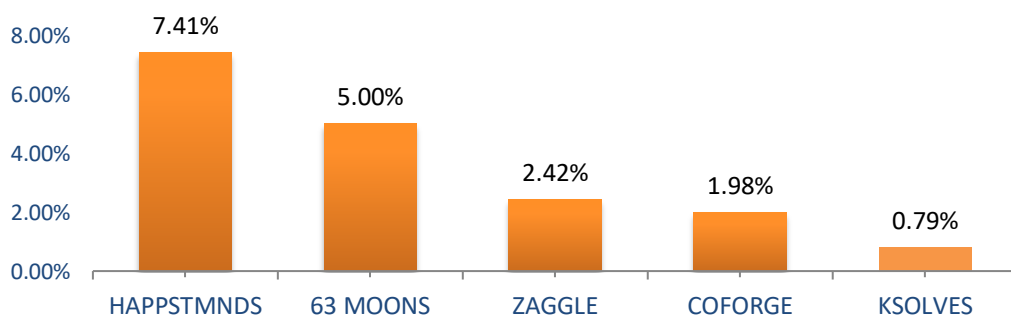
On Global front, Most of the European markets were trading in green as market participants digesting the results of the nation's general election, which saw the CDU emerging victorious. Asian markets ended in red as weak U.S. economic data rekindled growth worries and also weighing on markets, researchers in China said they discovered a new coronavirus in bats that enters cells using the same gateway as the virus that causes Covid-19.

Source: AceEquity

NEWS BULLETIN

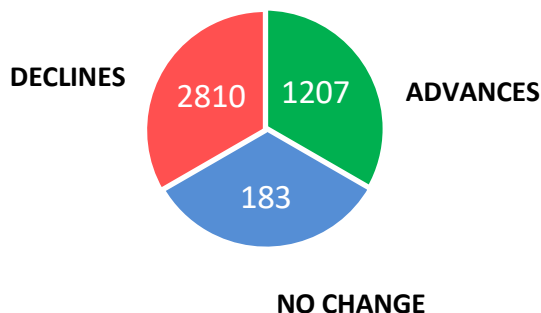
- **Adroit Infotech's** wholly owned subsidiary -- Verso Altima India has bagged order worth Rs 6.20 crore from Azam Media - Tanzania, for SAP-implementation services.
- **NBCC (India)** has secured work order worth Rs 264.16 crore (Excluding GST) from NIT Kurukshetra. The work order is for PMC for the construction of buildings.
- **RailTel Corporation of India** has received the work order from East Central Railway for Provision of Kavach (indigenous Train Collision Avoidance System) on Low Density Railway Track in 502.2 Rkm of East Central Railway. Broad consideration or size of order is Rs 288.15 crore (Including Tax). The said order is expected to be completed by February 20, 2027.

MARKET DRIVING SECTOR : IT

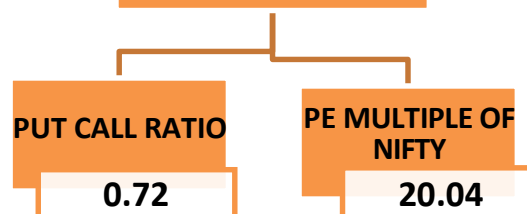


S&P BSE: IT
CLOSING: 38,729.01
CHANGE: - 1,034.84
CHANGE: + 2.60 %

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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