

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	85,762.01	85,640.05	85,883.50	85,315.33	85,439.62	-322.39	-0.38
NIFTY	26,328.55	26,333.70	26,373.20	26,210.05	26,250.30	-78.25	-0.30

## BOURSES CLOSED WITH MODERATE LOSS

The 30-share BSE Sensex was down by 322.39 points or 0.38% to settle at 85,439.62 and the Nifty was down by 78.25 points or 0.30% to settle at 26,250.30. The BSE Mid-Cap was up by 0.05% and BSE Small Cap was up by 0.07%. On the sectoral front, Realty, Auto, FMCG, Capital Goods, Consumer Durables and Metal were gaining indices. On the flip side, IT, Banks, Healthcare and Oil & Gas were losing indices. BEL, Hindustan Unilever, Tata Steel, Ultratech Cement and Axis Bank were the top gainers on the Sensex; on the flip side, HDFC Bank, Infosys, HCL Tech, Bajaj Finance and TCS were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
NESTLEIND	1,315.00	1,279.70	2.76
BEL	413.35	403.15	2.53
EICHERMOT	7,494.00	7,334.50	2.17
HINDUNILVR	2,385.50	2,348.00	1.60
TATASTEEL	185.73	182.88	1.56

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HDFCBANK	978.50	1,001.60	-2.31
WIPRO	263.00	269.00	-2.23
INFY	1,604.10	1,640.40	-2.21
HCLTECH	1,605.00	1,640.20	-2.15
ONGC	238.05	241.46	-1.41

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,76,47,379	978.50	2,721.39
ITC	4,83,58,124	349.60	1,695.44
RELIANCE	87,04,973	1,577.00	1,383.52
SBIN	1,12,59,060	1,005.40	1,134.45
BEL	2,60,97,635	413.35	1,079.66

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ITC	4,83,58,124	349.60	1,695.4
TATASTEEL	3,06,46,009	185.73	568.02
HDFCBANK	2,76,47,379	978.50	2,721.3
BEL	2,60,97,635	413.35	1,079.6
ONGC	2,12,01,434	238.05	507.73



Indian equity benchmarks ended in a negative terrain on Monday dragged down by sharp losses in IT majors such as Infosys, Wipro, and HCL Technologies. Markets made a cautious start, and hovered near the flat lines amid rising geopolitical tensions after the U.S. attacked Venezuela and captured its president, Nicolas Maduro. Selling pressure intensified during the afternoon session, as traders turned cautious after U.S. President Donald Trump said the United States could raise tariffs on Indian goods if New Delhi does not address concerns related to Russian oil. Finally, markets ended the day with significant losses. Traders paid no attention towards the Think tank GTRI has said that the US-Venezuela conflict will have a negligible impact on India's trade with the South American country. Investors took note of report that Commerce and Industry Minister Piyush Goyal is all set to visit Brussels this week for talks with his EU counterpart on the proposed FTA, which has entered its final negotiation phase.

On Global market: European markets were trading in green amid defense stocks surge on rising geopolitical tensions. Asian markets ended higher as investors shrugged off U.S.-Venezuela tensions and shifted focus to upcoming U.S. economic data that could influence Federal Reserve policy. Source: Ace Equity

## NEWS BULLETIN

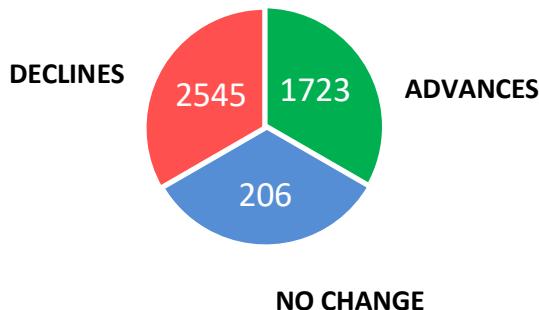
- **Apollo Sindoori Hotels'** wholly owned subsidiary - Sindoori Management Solutions has received work orders aggregating to Rs 64.29 crore. Sindoori Management Solutions has secured first contract worth Rs 43.51 crore (exclusive of GST) from Tata Main Hospital for integrated facility management & porter services.
- **Diamond Power Infrastructure** has secured a letter of intent (LoI) worth around Rs 72.51 crore (exclusive GST) from Larsen & Toubro (L&T), Construction. The LoI is for supply of Power Cables and has been on 'Kms rate basis with PV Formulae'. The LoI is to be executed by September 30, 2026.
- **Poonawalla Fincorp** has reported 77.5% Year-on-Year (Y-o-Y) growth in Assets Under Management (AUM) and 15.3% growth on quarter on quarter (Q-o-Q) to around Rs 55,000 crore as on December 31, 2025 (Q3FY26).

## MARKET DRIVING SECTOR : IT

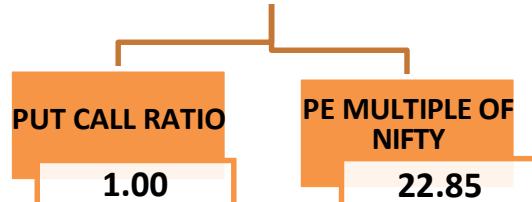


**S&P BSE: IT**  
**CLOSING: 36,629.84**  
**CHANGE: - 507.07**  
**CHANGE: - 1.37%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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