



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,269.78	82,388.97	82,726.65	79,899.42	80,722.94	-1,546.84	- 1.88
NIFTY	25,320.65	25,333.75	25,440.90	24,571.75	24,825.45	-495.20	- 1.96

## MARKET ENDED IN RED POST BUDGET

The 30-share BSE Sensex was down by 1546.84 points or 1.88% to settle at 80,722.94 and the Nifty was down by 495.20 points or 1.96% to settle at 25,825.45. The BSE Focused Mid-Cap was down by 1.17% and BSE 500 was down by 2%. On the sectoral front, there were no gaining index. On the flip side, IT, Healthcare, Auto, FMCG and Consumer Durables, Realty, Banks, Oil & Gas, Capital Goods and Metal were losing indices. TCS, Sunpharma, Titan and Infosys were the top gainers on the Sensex; on the flip side, SBIN, Adani Ports, BEL, NTPC and ITC 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	1,332.50	1,287.90	3.46
TATACONSUM	1,132.00	1,107.20	2.24
APOLLOHOSP	6,950.00	6,801.00	2.19
M&M	3,444.30	3,384.40	1.77
ITC	322.30	318.60	1.16

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	962.80	1,024.05	-5.98
TATASTEEL	192.58	202.32	-4.81
COALINDIA	440.00	455.75	-3.46
ONGC	268.06	275.39	-2.66
ICICIBANK	1,357.00	1,383.60	-1.92

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
ICICIBANK	2,40,13,717	1,357.00	3,278.78
HDFCBANK	2,96,91,233	929.00	2,766.72
AXISBANK	1,47,58,482	1,366.90	2,022.89
M&M	52,91,090	3,444.30	1,796.09
BEL	3,66,84,903	449.25	1,642.71

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	5,22,62,849	192.58	1,010.5
ETERNAL	4,37,52,149	273.50	1,197.2
ITC	4,19,75,824	322.30	1,350.8
BEL	3,66,84,903	449.25	1,642.7
HDFCBANK	2,96,91,233	929.00	2,766.7



Indian equity benchmarks ended Sunday's special trading session near the day's low points following Finance Minister Nirmala Sitharaman presented the Union Budget 2026. Markets made a cautious start and hovered around the neutral lines as investors awaited clarity from the Budget announcements. However, in afternoon session, market slipped into red terrains and remained under heavy selling pressure, after proposals to raise the Securities Transaction Tax (STT) on F&O trading. Traders overlooked Commerce and Industry Minister Piyush Goyal said that the negotiations for a proposed bilateral trade agreement between India and the US are progressing, and both countries are working to close the deal quickly. Traders pain no head towards the data showed gross GST collections rose 6.2 per cent to over Rs 1.93 lakh crore in January, mainly on higher revenues from imports.

The Reserve Bank of India (RBI) in its latest monthly data has showed that India's international trade in services showed notable momentum in December 2025, with both exports and imports registering year-on-year and month on month growth.

Source: Ace Equity

### NEWS BULLETIN

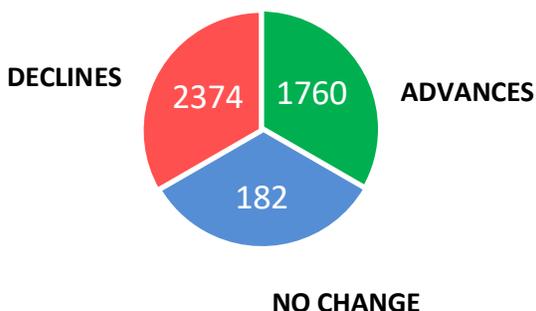
- **Sun Pharmaceutical Industries** has reported 38.97% fall in its net profit at Rs 705.44 crore for the third quarter ended December 31, 2025 as compared to Rs 1,155.80 crore for the same quarter in the previous year. The total income of the company decreased by 6.11% at Rs 5,867.67 crore for Q3FY26 as compared to Rs 6,249.83 crore for the corresponding quarter previous year.
- **CDSL (India)** has reported 14.31% rise in its net profit at Rs 119.95 crore for the third quarter ended December 31, 2025 as compared to Rs 104.93 crore for the same quarter in the previous year. The total income of the company increased by 18.67% at Rs 278.71 crore for Q3FY26 as compared to Rs 234.87 crore for the corresponding quarter previous year.

### MARKET DRIVING SECTOR : METAL

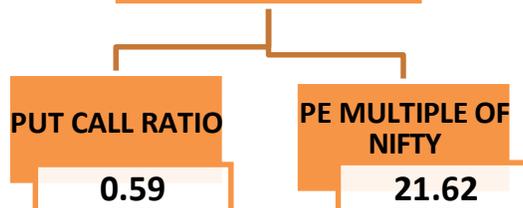


**S&P BSE: METAL**  
**CLOSING: 37,349.33**  
**CHANGE: - 1,495.84**  
**CHANGE: - 3.85%**

### MARKET BREADTH – NEGATIVE



### RATIO ANALYSIS



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