

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	80,722.94	80,555.68	81,732.25	80,387.25	81,666.46	+943.52	+1.17
NIFTY	24,825.45	24,796.50	25,108.10	24,679.40	25,088.40	+262.95	+1.06

INDICES RECOVERED LED BY VALUE BUYING

The 30-share BSE Sensex was up by 943.52 points or 1.17% to settle at 81,666.46 and the Nifty was up by 262.95 points or 1.06% to settle at 25,088.40. The BSE Focused Mid-Cap was up by 0.77% and BSE 500 was up by 0.99%. On the sectoral front, Auto, FMCG, Consumer Durables, Realty, Banks, Oil & Gas, Capital Goods and Metal were gaining indices. On the flip side, Healthcare and IT were losing index. Powergrid, Adani Ports, BEL, Reliance and Mahindra & Mahindra were the top gainers on the Sensex; on the flip side, Axis Bank, Infosys, TCS, Trent and Titan were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
POWERGRID	270.00	251.35	7.42
TMPV	364.00	344.65	5.61
ADANI PORTS	1,402.50	1,344.90	4.28
BEL	440.80	425.35	3.63
TATACONSUM	1,121.10	1,087.30	3.11

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAMFIN	966.00	997.60	-3.17
AXISBANK	1,309.20	1,340.40	-2.33
MAXHEALTH	958.95	976.70	-1.82
INFY	1,627.00	1,654.50	-1.66
CIPLA	1,314.50	1,328.90	-1.08

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,80,32,106	928.10	2,590.53
RELIANCE	1,57,11,165	1,388.00	2,157.55
BEL	4,36,52,893	440.80	1,881.96
ICICIBANK	1,28,00,245	1,351.00	1,722.18
SBIN	1,44,34,549	1,026.50	1,461.45

Most Active (by volume)			
Name	Qty	Pr.	Value CR
BEL	4,36,52,893	440.80	1,881.9
POWERGRID	3,71,09,237	270.00	983.10
ITC	3,52,27,572	314.55	1,087
ETERNAL	3,42,08,468	273.00	929.31
HDFCBANK	2,80,32,106	928.10	2,590.5



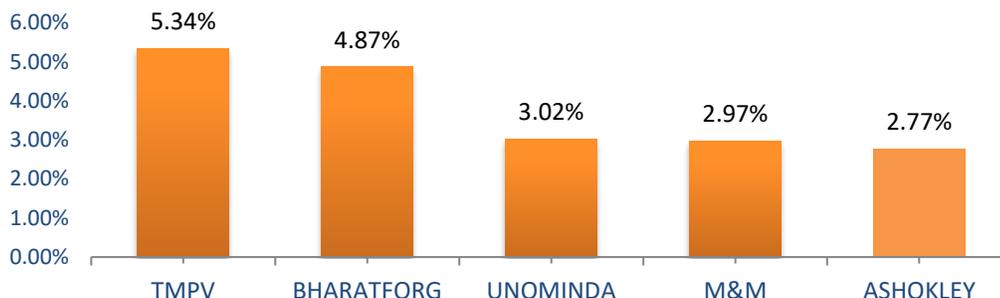
Indian equity benchmarks ended Monday’s trading session near day’s high points, rebounding after the sharp sell-off in the previous session post Union Budget 2026. Markets opened on a weak note amid disappointment over the government's budget proposal to increase taxes on equity derivatives trading. However, strong buying at lower levels helped indices to recover in the late afternoon and closed with solid gains. Traders took support from the seasonally adjusted HSBC India Manufacturing Purchasing Managers’ Index (PMI), which surged to 55.4 in January 2026 from 55.0 in December 2025, indicating a stronger improvement in the health of the sector. Sentiments remained upbeat after IT Minister Ashwini Vaishnaw said he expects \$200 billion to flow into the sector following the Union Budget, which proposed a 20-year tax holiday for foreign cloud service providers using data centres in India and rationalised the safe harbour framework for IT firms.

On the global front, European equity markets were trading higher despite global rout in metal and energy prices weighed on commodity-related stocks. Asian markets ended lower as new tariff threats from US President Donald Trump contributed to the negative sentiment.
Source: Ace Equity

NEWS BULLETIN

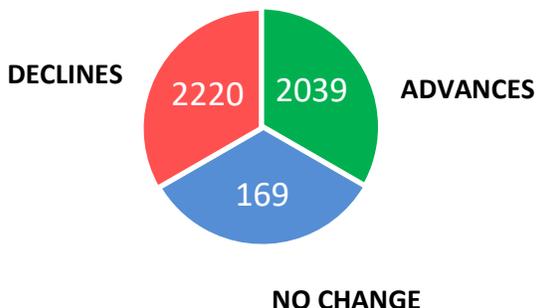
- **Hyundai Motor India** has reported 6.30% rise in its net profit at Rs 1194.92 crore for the third quarter ended December 31, 2025 as compared to Rs 1124.09 crore for the same quarter in the previous year. Total income of the company increased by 7.34% at Rs 17689.03 crore for Q3FY26 as compared Rs 16478.97 crore for the corresponding quarter previous year.
- **Delhivery** has reported 98.11% rise in its net profit at Rs 75.30 crore for the third quarter ended December 31, 2025 as compared to Rs 38.01 crore for the same quarter in the previous year. Total income of the company increased by 16.57% at Rs 2,690.26 crore for Q3FY26 as compared Rs 2,307.88 crore for the corresponding quarter previous year.

MARKET DRIVING SECTOR : AUTO



S&P BSE: AUTO
CLOSING: 59,278.36
CHANGE: + 1,152.70
CHANGE: + 1.98%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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