

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,918.90	77,056.75	77,711.35	76,424.55	77,566.16	-1,352.74	-1.71
NIFTY	24,450.45	23,868.05	24,078.15	23,697.80	24,028.05	-422.40	-1.73

INDICES IN RED AMID GEO-POLITICAL TENSIONS

The 30-share BSE Sensex was down by 1,352.74 points or 1.71% to settle at 77,566.16 and the Nifty was down by 422.40 points or 1.73% to settle at 24,028.05. The BSE Small Cap 250 was down by 2.46% and BSE 500 was down by 1.91%. On the sectoral front, there were no gainer index. On the flip side, Auto, Metal, Consumer Durables, Realty, Healthcare, Banks, Capital Goods, FMCG, Oil & Gas and IT were losing indices. Reliance, Sunpharma, Infosys, Tech Mahindra and HCL Tech were top gainers on the Sensex; on the flip side, Ultratech Cement, Maruti, Mahindra & Mahindra, SBIN and Indigo 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
WIPRO	198.60	195.40	1.64
RELIANCE	1,418.60	1,404.80	0.98
APOLLOHOSP	7,791.00	7,724.50	0.86
INFY	1,316.00	1,308.40	0.58
HCLTECH	1,362.40	1,356.70	0.42

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TMPV	332.25	350.75	-5.27
ULTRACEMCO	11,358.00	11,987.00	-5.25
MARUTI	13,498.00	14,159.00	-4.67
EICHERMOT	7,275.00	7,620.50	-4.53
M&M	3,184.50	3,332.50	-4.44

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
RELIANCE	2,48,70,822	1,418.60	3,492.04
HDFCBANK	3,55,92,613	839.10	2,967.07
SBIN	2,46,31,198	1,101.60	2,667.48
ICICIBANK	1,61,16,652	1,275.00	2,049.28
INDIGO	42,71,926	4,251.20	1,766.65

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ONGC	5,65,12,457	269.95	1,553.8
ETERNAL	4,85,05,614	230.50	1,093.5
TATASTEEL	4,30,19,965	191.13	816.39
HDFCBANK	3,55,92,613	839.10	2,967
WIPRO	2,58,62,728	198.60	509.31



Indian equity benchmarks ended significantly lower on Monday, amid broad-based selling across sectors and persistent geopolitical tensions in the Middle East. Markets made a gap-down opening, as investors remained cautious after global crude oil prices surged past \$100 per barrel following production cuts by major Middle Eastern producers-including Kuwait, Iran, and the United Arab Emirates-after the closure of the Strait of Hormuz. However, markets pared some losses from day's low points in the second half of the session, supported by value buying at lower levels. Traders were concerned as a finance ministry report cautioned that prolonged crisis in the Middle East can have adverse implications on the exchange rate and may stoke inflationary pressures on account of rising prices of petroleum goods and fertilisers. Traders remained cautious as the Global Trade Research Initiative (GTRI) stated that India's agri and food products exports worth \$11.8 billion to West Asia are at risk as the conflict in the region is disrupting shipping routes, raising insurance costs and creating uncertainty in logistics.

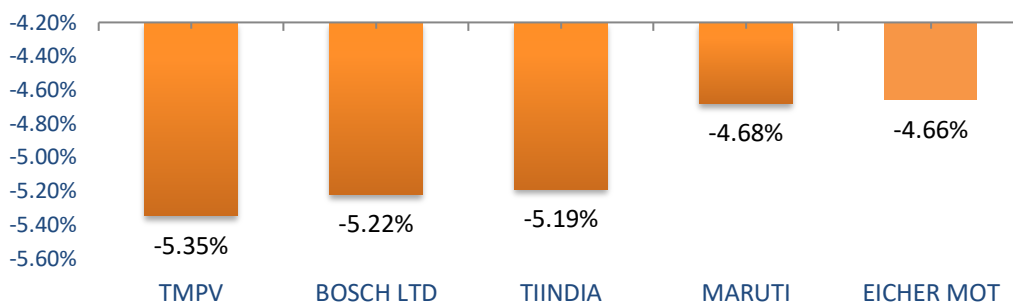
On the global front, European equity markets traded in red as investors braced for a prolonged conflict in the Middle East that could send energy costs even higher, risking inflation and regional economic growth.

Source: Ace Equity

NEWS BULLETIN

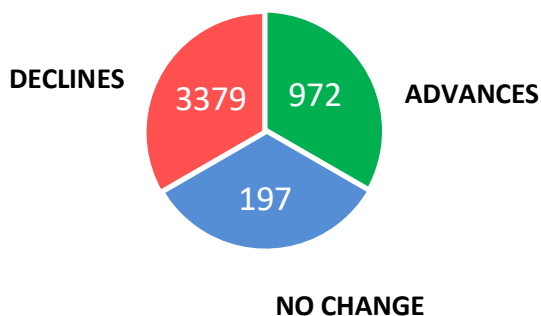
- **SML Mahindra's commercial vehicles production** has surged 16.44% to 1679 units in February 2026 as against 1442 units in February 2025. It has sold 1415 units of commercial vehicles in February 2026 as against 1229 units in February 2025. Further, commercial vehicles exports stood at 88 units in February 2026.
- **Chiraharit** has received a purchase order worth Rs 1.06 crore from Sterling and Wilson Renewable Energy. The order is for the supply and installation of pipes & fittings.
- **Jyoti** has secured purchase order worth Rs 5.38 crore (excluding GST) for 10 Nos. Large Capacity VT Pumps from M/s. PVR Projects, Hyderabad for project Jawahar Lift Irrigation Scheme, located at Khammam, Telangana.

MARKET DRIVING SECTOR : AUTO

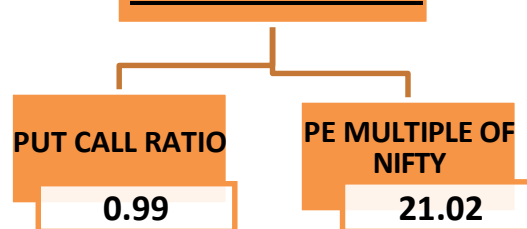


S&P BSE: AUTO
CLOSING: 57,504.46
CHANGE: - 2,325.40
CHANGE: - 3.89%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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