



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	78,205.98	78,238.91	78,324.37	76,759.26	76,863.71	-1,342.27	-1.72
NIFTY	24,261.60	24,231.85	24,299.00	23,834.30	23,866.85	-394.75	-1.63

## INDICES IN RED AMID GEO-POLITICAL UNCERTAINTY IN WEST ASIA

The 30-share BSE Sensex was down by 1,342.27 points or 1.72% to settle at 76,863.71 and the Nifty was down by 394.75 points or 1.63% to settle at 23,866.85. The BSE Small Cap 250 was down by 0.32% and BSE 500 was down by 1.36%. On the sectoral front, Healthcare and Oil & Gas were gainer indices. On the flip side, Auto, Metal, Consumer Durables, Realty, Banks, Capital Goods, FMCG and IT were losing indices. NTPC, Sunpharma and Powergrid were top gainers on the Sensex; on the flip side, Bajaj Finance, Axis Bank, Bajaj Finserv, Mahindra & Mahindra and Maruti 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
JIOFIN	238.50	236.00	1.06
COALINDIA	446.90	443.55	0.76
SUNPHARMA	1,824.00	1,812.80	0.62
DRREDDY	1,322.40	1,314.60	0.59
ONGC	270.60	269.20	0.52

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
BAJFINANCE	893.95	939.80	-4.88
AXISBANK	1,254.00	1,314.70	-4.62
BAJAJFINSV	1,796.60	1,867.80	-3.81
EICHERMOT	7,261.00	7,536.50	-3.66
M&M	3,178.00	3,293.70	-3.51

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,22,61,076	834.40	3,525.93
RELIANCE	2,18,48,087	1,386.80	3,065.16
BHARTIARTL	95,48,404	1,807.00	1,736.64
ICICIBANK	1,32,24,259	1,292.00	1,715.77
M&M	45,74,950	3,178.00	1,467.12

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,22,61,076	834.40	3,525.9
ETERNAL	3,43,27,861	223.44	773.27
TATASTEEL	3,42,07,226	194.66	671.04
KOTAKBANK	2,99,91,868	380.80	1,155.5
WIPRO	2,91,99,002	201.80	592.74



Indian equity benchmarks witnessed heavy selling pressure on Wednesday, with both the Nifty and Sensex settling with cut of over 1.7%, dragged by heavy selling in banking and auto sector stocks. Markets made a cautious start, and soon indices extended losses. Markets remained under pressure throughout the session amid rising geopolitical uncertainty in West Asia and continued foreign fund outflows. Some cautiousness came as ICRA said escalating conflict in West Asia could pose downside risks to India's economic growth outlook if the conflict persists. It expects India's real GDP growth to be around 7.1 per cent in FY27, slightly lower than the 7.6 per cent estimated for FY26. Traders took note of Minister of State for Finance Pankaj Chaudhary's statement that the fiscal deficit as a percentage of GDP has been revised upwards for the fiscal years 2022-23, 2023-24, and 2024-25. Sentiments remained downbeat as FIIs offloaded equities worth Rs 4,672.64 crore on Tuesday, according to exchange data.

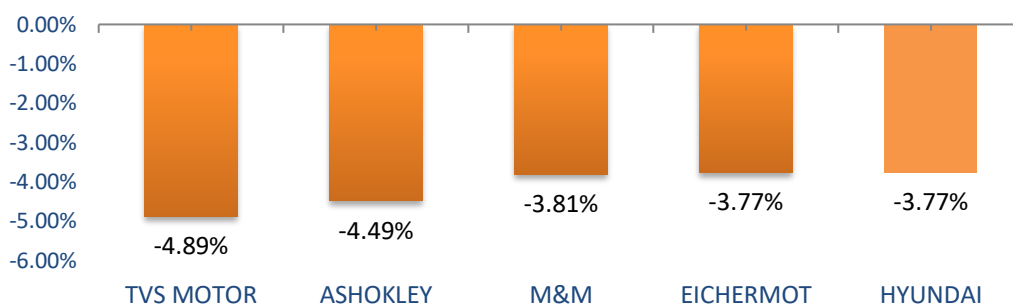
On the global front, European equity markets traded in the red after crude oil prices regained strength despite reports indicating the International Energy Agency (IEA) proposed the largest release of oil reserves in its history to offset supply disruptions stemming from the war on Iran.

Source: Ace Equity

## NEWS BULLETIN

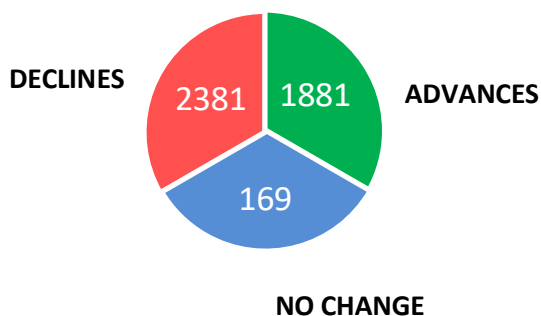
- **3i Infotech** has received an order worth around Rs 5.66 crore from a prominent Indian engineering and industrial solutions company specializing in power and industrial equipment for providing Managed IT services across multiple locations for three years.
- **Admach Systems** has received a purchase order worth Rs 2.52 crore for the supply of Indexing Roller for Silma Machine, an Automatic Coil Strapping Machine, a Plate Scrubber, a Main Edge Milling Automated Tool-Changing Device Structure, and a Pre & Post Washing Station and revamping of machine for Domestic and Export client.
- **Jash Engineering** has secured consolidated orders worth Rs 71 crore in the month of February 2026. Out of these, orders worth Rs 23 crore are for Indian market, while rest of the orders worth Rs 48 crore are for markets outside India.

## MARKET DRIVING SECTOR : AUTO

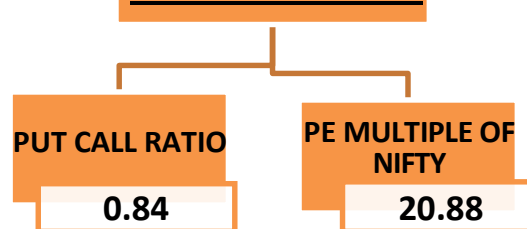


**S&P BSE: AUTO**  
CLOSING: 57,374.17  
CHANGE: - 1,812.61  
CHANGE: - 3.06%

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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