

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,424.65	-288.35	-1.12	2.41	-2.76
BSE Sensex	82,225.92	-1068.74	-1.28	1.86	-3.48
Bank Nifty	61,047.30	-216.95	-0.35	4.50	2.24
Nifty Midcap 100	59,066.35	-189.30	-0.32	3.41	-2.77
Nifty Smallcap 100	16,958.65	-93.30	-0.55	3.29	-4.21
S&P 500	6,890.07	52.32	0.77	-1.24	0.46
DJIA	49,174.50	370.44	0.76	-0.47	1.64
Nasdaq 100	24,977.04	268.1	1.09	-2.96	-0.91
Nikkei 225	57,321.09	495.39	0.87	8.86	10.59
Hang Seng	26,590.32	-491.59	-1.82	-0.69	0.96
Shanghai Com	4,117.41	35.34	0.87	2.53	2.34

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,424.65	61,047.30
Support	25,288 & 25,150	60,855 & 60,655
Resistance	25,602 & 25,779	61,204 & 61,354

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	20,550.91	20,653.44	-102.53
DII Cash Market	18,580.96	15,419.74	3,161.22

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
NTPC	382.75	1.94	20774.63
Coal India	430.95	1.16	8950.77
JSW Steel	1254.50	1.13	1515.57
Hindalco	922.85	0.73	5179.02
HUL	2358.60	0.56	1544.80
Top Losers			
Tech Mahindra	1345.40	-6.63	7441.04
HCL Tech	1339.20	-6.10	10004.68
Eternal	254.00	-5.22	76836.88
Infosys	1275.50	-3.92	27839.06
TCS	2573.70	-3.83	7798.83

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	71.14	-0.49	17.10
WTI (USD/bbl)	65.97	-0.51	15.09
Gold Spot (USD/t oz.)	5,159.29	-1.30	19.09
USD/INR	90.95	-0.08	1.10
10 Year G-Sec India	6.681	-0.24	1.51
US 10 Year Bond	4.042	0.33	-2.99

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equity benchmarks tumbled on Tuesday, dragged by information technology stocks which are on course for their worst month since April 2003 on persistent fears of AI-driven disruption. The GIFT Nifty futures were trading at 25,671.5 points as of 8:00 a.m. IST, indicating the benchmark Nifty 50 will open above Tuesday's close of 25,424.65.

Global

Wall Street closed higher on Tuesday, with tech stocks leading the charge as renewed enthusiasm for artificial intelligence offset concerns over potential disruptions caused by the nascent technology.

Tokyo stocks rose Tuesday as some heavyweight technology shares were bought following recent declines, although the upside was capped amid uncertainty about the US tariff policy under President Donald Trump.

Hong Kong stocks fell on Tuesday, tracking Wall Street's losses, as renewed concerns about the artificial intelligence race weighed on sentiment, while mainland markets rallied on the first trading day in the Year of the Horse.

Commodities & Currency :

The Indian rupee closed modestly weaker on Tuesday, weighed down by a drop in local stocks and strong dollar demand from the non-deliverable forwards market, though losses were limited by central bank intervention.

Gold retreated on Tuesday, easing from a three-week high as profit-taking and a firmer dollar pressured prices, while traders awaited clarity on US tariff plans and the outcome of talks between Washington and Tehran.

News:

India will overhaul how it calculates real GDP growth under revised national accounts series due to launch this week, the country's top statistical official said, adopting more granular price deflation to address concerns raised by economists.

India's information technology sector is forecast to surpass \$300 billion in revenue for the first time in the current fiscal year, an industry body said on Tuesday, amid challenges and opportunities arising from artificial intelligence.

Indian Prime Minister Narendra Modi will visit Israel from February 25 to 26, India's foreign ministry said on Tuesday.

A new Indian taxi service, backed by the federal government, will give drivers a share of profits from the business and charge no commissions, mounting a direct challenge to American giant Uber in the world's most populous nation.

India's IDFC First Bank has paid a net amount of 5.83 billion rupees (\$64.1 million) in principal and interest to departments of the northern state of Haryana, the lender said on Tuesday, following suspected fraudulent transactions in the accounts led to an investigation.

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