

Daily Market Monitor

February 13, 2026

Domestic Market Performance

Indian market indices	12-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25807	-0.57	0.07	9.73	11.98
BSE Sensex	83675	-0.66	-0.24	8.09	9.85
BSE 100	27046	-0.58	0.17	10.04	12.58
BSE 200	11714	-0.53	0.54	10.48	13.00
BSE 500	37049	-0.56	0.50	10.33	12.60
BSE SmallCap	50069	-0.63	1.00	7.36	6.22
BSE MidCap	46484	-0.61	0.80	11.93	14.04
BSE LargeCap	9963	-0.49	0.60	10.28	12.81
Sectoral indices					
BSE IT	32123	-5.29	-12.44	-11.07	-21.63
BSE Oil & Gas	29136	-1.18	6.20	15.93	22.25
BSE FMCG	19065	-0.43	-1.08	-1.97	-1.96
BSE Auto	63185	-0.22	1.59	32.45	25.90
BSE Bankex	68067	-0.04	1.81	14.32	21.16
BSE Teck	16798	-3.58	-8.58	-3.18	-11.62
BSE Capital Goods	69045	0.07	6.15	10.08	17.18
BSE Consumer Durable	59754	0.64	-3.36	9.88	6.18

Turnover (Rs Cr)	12-Feb	11-Feb
BSE Cash	10469	9329
NSE Cash	119233	112626
NSE F&O	9863185	9887711

Rs. Cr (Equity)	FII Inv 11-Feb	MF Inv 9-Feb	DII Inv 12-Feb
Buy	19,373	10,380	17,214
Sell	16,260	10,773	16,937
Net	3,113	-393	277
Net (MTD)	18,771	-5,142	4,222
Net (YTD)	-14,926	37,212	66,551

	12-Feb	1Day	Month ago	Year ago
USD	90.59	90.57	90.19	86.85
GBP	123.36	123.84	121.17	108.07
Euro	107.45	107.96	105.23	89.96
100 Yen	59.10	59.21	57.08	56.52

Indian markets

- Indian equity benchmarks closed lower on Thursday, amid robust jobs data from the United States reducing expectations of imminent interest rate cuts.
- The top losers were Tech Mahindra, Infosys, Tata Consultancy Services, HCL Technologies and Wipro, down 4.79%- 6.40%.
- The top gainers were Bajaj Finance, Shriram Finance, Eicher Motors, ICICI Bank and Bharat Electronics, up 1.47%- 3.31%.

Indian debt

- The interbank call-money rate ended lower at 4.60% on Thursday compared to 4.65% on Wednesday.
- Government bond prices rose on Thursday after lower-than-expected January inflation triggered short-covering.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.68% on Thursday compared to 6.71% on Wednesday.

Indian Rupee

- The spot rupee closed higher against the dollar on Thursday, supported by foreign fund inflows amid liquidity infusion by the Reserve Bank of India.

Regulatory

- The Securities and Exchange Board of India (Sebi) plans to reduce regulatory costs and compliance burden to enhance the competitiveness of the securities market.
- The Insurance Regulatory and Development Authority of India (Irdai) has granted insurers greater flexibility in investing in Alternative Investment Funds (AIFs).

Economy and Government

- India's retail inflation rose to 2.75% in January 2026 compared to 1.33% in December 2025 on higher food and precious metal prices.
- The Ministry of Defence has entered into an agreement with Hindustan Aeronautics Limited (HAL) to procure eight Dornier 228 aircraft, along with necessary operational equipment, for the Indian Coast Guard at a total cost of Rs 2,312 crore, under the 'Buy (Indian)' category.
- Mozambique has launched a new digital e-Visa system, allowing travellers from 183 countries, including India, to apply online.
- The Jammu and Kashmir government proposed suitable provisions in the draft New Media Policy-2026 to provide a regulatory framework for the new and social media along with the print media.

Domestic Debt Market Indicators

Instrument	12-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.60%	4.65%	4.75%	5.00%	7.00%	5.50%
3-Month T-Bill	5.28%	5.32%	5.33%	5.42%	6.34%	6.42%
6-Month T-Bill	5.52%	5.55%	5.52%	5.57%	6.47%	6.54%
1-year T-Bill	5.55%	5.59%	5.54%	5.55%	6.40%	6.52%
3-Month CD	6.85%	6.93%	6.60%	6.00%	7.00%	7.40%
6-Month CD	6.99%	7.05%	6.80%	6.22%	7.25%	7.61%
1-year CD	6.90%	6.92%	6.87%	6.39%	7.15%	7.58%
3-Month CP	7.45%	7.55%	7.00%	6.54%	7.25%	7.76%
6-Month CP	7.50%	7.60%	7.17%	6.65%	7.55%	7.90%
1-year CP	7.35%	7.45%	7.22%	6.78%	7.45%	7.88%
1-year Gilt	5.73%	5.69%	5.66%	5.54%	6.40%	6.60%
3-year Gilt	5.98%	5.99%	5.89%	5.91%	6.44%	6.65%
5-year Gilt	6.45%	6.48%	6.36%	6.16%	6.45%	6.67%
1-year AAA	7.01%	7.09%	6.98%	6.60%	7.29%	7.49%
3-year AAA	7.16%	7.21%	7.00%	6.75%	7.11%	7.30%
5-year AAA	7.23%	7.26%	7.21%	6.82%	7.11%	7.24%
10-year G-sec	6.69%	6.71%	6.60%	6.50%	6.58%	6.70%
Net LAF (Rs Cr)	286404	336776	16411	210486	-9354	-207083
Forex reserves (\$ bn)	723.77	709.41	686.80	689.73	642.49	630.61

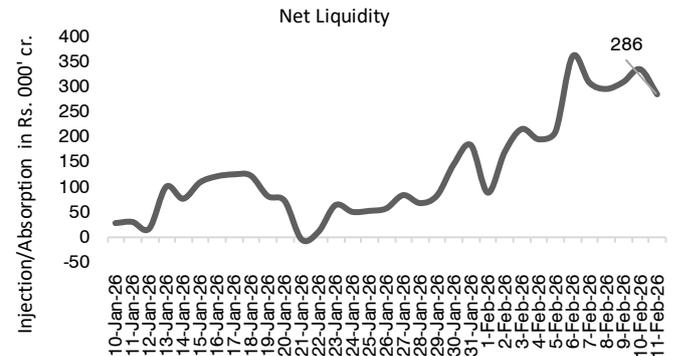
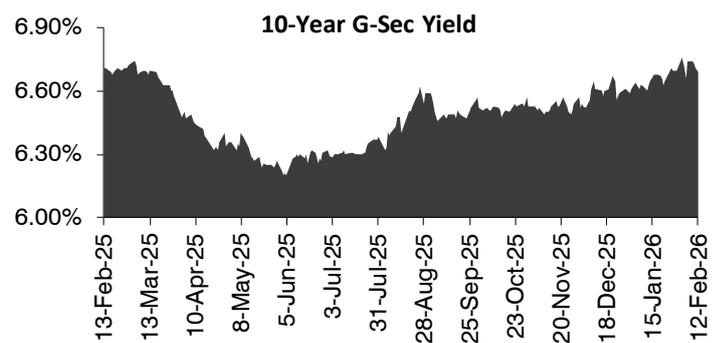
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	7.20	7.94	7.99	9.22	9.70
1 Year	5.73	7.01	7.75	7.80	9.03	9.51
3 Year	5.98	7.16	7.90	7.95	9.18	9.66
5 Year	6.45	7.23	8.07	8.12	9.35	9.83
10 Year	6.69	7.39	8.23	8.28	9.51	9.99

Rs. Cr (Debt)	FII Inv 11-Feb	MF Inv 9-Feb
Buy	244	14,220
Sell	437	19,470
Net	-193	-5,250
Net (MTD)	476	-36,338
Net (YTD)	-5,801	-127,145

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.75% (Jan-26)	0.25% (Oct'25)	4.26% (Jan'25)
WPI	0.83% (Dec-25)	0.13% (Sep-25)	2.37% (Dec-24)
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
India Manufacturing PMI	55.0 (Dec-25)	57.7 (Sep-25)	56.4 (Dec-24)
India Service PMI	58.0 (Dec-25)	60.9 (Sep-25)	59.3 (Dec-24)
Bank Credit Growth*	-1.45% (Jan 15, 2026)		3.02% (Dec 31, 2025)
Bank Deposit Growth*	-0.94% (Jan 15, 2026)		3.91% (Dec 31, 2025)

Capital markets

- Ceigall Infra Projects received a Letter of Award (LoA) from the National Highways Authority of India (NHA) for the construction of a four-lane highway project in Bihar worth Rs 2,160 crore under the Hybrid Annuity Mode (HAM).
- USV plans to acquire a 79% stake in Wellbeing Nutrition at a valuation of Rs 1,583 crore.
- Experion Developers plans to invest Rs 1,500 crore to develop a housing project in Noida to expand its business.
- Hartek secured new orders worth Rs 735 crore through its power systems business unit.
- Regtech startup Idfy secured Rs 476 crore from Neo Asset Management and existing investors.



Global market indices	12-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49451.98	-1.34	-0.28	17.74	11.46
Nikkei 225	57639.84	-0.02	10.97	61.83	47.93
FTSE	10402.44	-0.67	2.58	21.20	18.11
Hang Seng	27032.54	-0.86	1.59	16.92	23.67
Taiwan	Closed	NA	NA	NA	NA

Global debt	12-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.09	4.18	4.19	4.08	4.23	4.62
UK 10-Year (%)	4.45	4.48	4.37	4.40	4.68	4.54
German 10-Year (%)	2.78	2.80	2.80	2.65	2.73	2.48
Japan 10-Year (%)	2.23	2.24	2.08	1.70	1.49	1.34

Domestic	12-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	155650	-1.06	10.82	74.57	83.45
Silver (Rs / Kg)	259133	-2.75	0.92	156.84	175.12
Aluminium (Rs / Kg)	315	0.13	-0.29	25.38	22.45
Copper (Rs / kg)	1259	0.51	0.75	40.19	49.04
Lead (Rs / kg)	195	0.62	1.04	4.53	4.42
Zinc (Rs /Kg)	333	0.23	5.54	21.47	22.41
Nickel (Rs / kg)	1622	1.26	-1.89	14.59	20.23

Global	12-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5073.48	1.30	12.51	63.60	74.69
Silver (oz/\$)	8413.00	4.24	5.28	146.57	163.32
Brent (\$/bbl)	67.52	-2.71	5.71	-9.70	-10.19
NYMEX crude (\$/bbl)	62.84	-2.77	5.61	-12.09	-11.95

Global markets

- Wall Street stocks closed lower on Thursday dragged down by transport and technology stocks over AI disruption concerns.
- 10-year US bond yield ended lower at 4.09% due to home sales data ahead to the key inflation report.
- FTSE index closed lower on Thursday led by profit booking due to global risk-off sentiment.
- Asian markets were trading mostly lower at 8.30 AM.
- US Initial Jobless Claims dropped to 227,000 for the week ending February 7, 2026, down from 232,000 in the preceding week.
- The UK economy expanded by 1.0% year-on-year in the fourth quarter of 2025, compared to downwardly revised 1.2% growth in the third quarter of 2025.
- UK Industrial Production increased 0.5% in December 2025 compared to 2.3% rise in November 2025 while manufacturing production rose by 0.5% from a downwardly revised 1.3% gain.
- The UK trade deficit narrowed to £4.34 billion in December 2025, down compared to a downwardly revised £5.56 billion in November 2025.
- China new home prices fell 3.1% year-on-year in January 2026, compared to a 2.7% decline in December 2025.

Commodity

- Crude oil prices fell by \$1.79 to \$62.84 a barrel on the NYMEX on weaker demand signals, easing Middle East tensions and expectations of higher supply.
- Domestic gold prices rose due to profit booking followed stronger-than-expected US jobs data.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Feb 13	US Inflation Rate, Jan	2.7%
Feb 16	Japan GDP Price Index YoY Prel Q4	3.4%
Feb 16	India WPI Inflation, Jan	0.8%
Feb 17	UK Unemployment Rate Dec	5.1%
Feb 18	UK Inflation Rate, Jan	3.4%

Source: Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites

Abbreviations: FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

*Note: Bank credit and deposit growth are calculated on fortnightly basis. #flash PMI numbers

Indicators		Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25
Debt Indicators	Currency in circulation (Rs billion)	39800	39079	38551	38184	38071	38097	38147	38372	38344	37762
	Repo rate	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%
	10-year G-sec yield	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%
	Call rate	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%
	Forex reserves (\$ billion; mthly. avg.)	696	692	688	699	701	693	698	699	689	682
GDP	GDP	NA	NA	7.80%	7.80%	7.40%	7.40%	6.40%	6.40%	6.40%	6.40%
	Fiscal deficit (Rs billion)	NA	-120829	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32
	IIP, %y/y	NA	7.80%	6.70%	0.40%	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%
	Exports, \$ billion	NA	38.51	38.13	34.38	36.38	35.1	37.24	35.14	38.73	38.49
	Imports, \$ billion	NA	63.55	62.66	76.06	68.53	61.59	64.59	53.92	60.61	64.91
	Manufacturing PMI	55.4	55	56.6	59.2	57.7	59.3	59.1	58.4	57.6	58.2
	Services PMI	58.5	58	59.8	58.8	60.9	62.9	60.5	60.4	58.8	58.7
	GST collections (Rs crore)	193384	174550	170276	195936	189017	186315	195735	184597	201050	236716
	India crude oil import (mbpd)	NA	21.59	21.24	21.01	20.21	19.60	18.89	20.32	21.3	21.0
Sector update	Auto – Passenger vehicles	NA	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%
	Auto – Two-wheelers	NA	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%
	Auto – Commercial vehicles	NA	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%
	Auto – Tractors	NA	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%
	Infra – Coal	NA	3.60%	2.10%	-8.50%	-1.20%	11.40%	12.30%	-6.80%	2.8%	3.5%
	Infra – Electricity	NA	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%	-1.20%	-4.7%	1.7%
	Infra – Steel	NA	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%	9.70%	7.4%	4.4%
	Infra – Cement	NA	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%	8.20%	9.7%	6.3%

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