

Daily Market Monitor

February 17, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	16-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25683	0.83	-0.05	9.20	12.01
BSE Sensex	83277	0.79	-0.35	7.57	9.66
BSE 100	26906	0.79	-0.20	9.47	12.90
BSE 200	11649	0.81	0.17	9.86	13.54
BSE 500	36788	0.70	-0.11	9.56	13.31
BSE SmallCap	49081	-0.40	-1.25	5.24	8.08
BSE MidCap	45988	0.62	-0.43	10.73	15.75
BSE LargeCap	9910	0.80	0.26	9.70	13.11
Sectoral indices					
BSE IT	31617	0.08	-16.30	-12.47	-22.08
BSE Oil & Gas	28849	0.89	3.96	14.78	23.54
BSE FMCG	18844	0.59	-1.19	-3.10	-2.02
BSE Auto	62092	-0.79	1.27	30.16	25.91
BSE Bankex	68283	1.20	0.47	14.68	22.32
BSE Teck	16672	-1.47	-10.96	-3.91	-11.68
BSE Capital Goods	68957	1.05	7.83	9.94	20.24
BSE Consumer Durable	59351	0.80	-1.12	9.14	8.53

Turnover (Rs Cr)	16-Feb	13-Feb
BSE Cash	7506	9424
NSE Cash	89436	123599
NSE F&O	27261880	18803277

Rs. Cr (Equity)	FII Inv 13-Feb	MF Inv 12-Feb	DII Inv 16-Feb
Buy	16,395	13,896	13,121
Sell	22,488	14,168	11,454
Net	-6,093	-271	1,667
Net (MTD)	13,582	-5,109	11,443
Net (YTD)	-20,116	37,246	73,772

	16-Feb	1Day	Month ago	Year ago
USD	90.71	90.74	90.65	86.89
GBP	123.76	123.45	121.31	109.12
Euro	107.65	107.62	105.22	90.86
100 Yen	59.24	59.20	57.24	56.93

Indian markets

- Indian equity benchmarks closed higher on Monday, driven by upswings in financial, energy, pharmaceutical and healthcare stocks.
- The top gainers were Power Grid Corporation of India, Coal India, HDFC Bank, Adani Enterprises and Max Healthcare Institute, up 2.03- 4.74%.
- The top losers were Kwaliti Wall's (India) Limited, Tech Mahindra, Bajaj Finance, Maruti Suzuki India and Tata Motors Passenger Vehicles, down 0.91- 2.01%.

Indian debt

- The interbank call-money rate ended lower at 4.60% on Monday compared to 5.05% on Friday.
- Government bond prices rose on Monday, tracking rally in US bond prices after softer US inflation data and surplus in banking system liquidity.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.66% on Monday compared to 6.68% on Friday.

Indian Rupee

- The rupee closed marginally higher against the United States (US) dollar on Monday, supported by foreign fund inflows.

Regulatory

- The Reserve Bank of India's (RBI) drafted norms aimed at curbing mis-selling of financial products could weigh more heavily on the private sector banks given their higher reliance on insurance income.
- SEBI proposed revising how ETFs determine base prices and daily price bands to better reflect real-time market conditions and reduce manual errors.

Economy and Government

- India wholesale prices rose 1.81% year-on-year in January 2026, compared to a 0.83% increase in December 2025.
- India's unemployment rate rose to 5.0% in January 2026 compared to 4.8% in December 2025.
- According to government export and import data India's merchandise trade deficit surged to \$34.68 billion in January 2026 compared to \$25.04 billion in December 2025.
- Chief Economic Advisor V Anantha Nageswaran said adoption of Artificial Intelligence requires urgency, political will and a national commitment towards aligning technology with mass employability.

Domestic Debt Market Indicators

Instrument	16-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.60%	5.05%	5.40%	5.45%	7.00%	5.80%
3-Month T-Bill	5.30%	5.27%	5.36%	5.40%	6.34%	6.45%
6-Month T-Bill	5.47%	5.47%	5.60%	5.55%	6.47%	6.55%
1-year T-Bill	5.54%	5.54%	5.60%	5.52%	6.40%	6.53%
3-Month CD	6.98%	6.70%	6.85%	5.97%	7.00%	7.40%
6-Month CD	6.90%	6.92%	7.03%	6.22%	7.25%	7.60%
1-year CD	6.84%	6.82%	7.03%	6.39%	7.15%	7.57%
3-Month CP	7.40%	7.35%	7.15%	6.53%	7.25%	7.75%
6-Month CP	7.40%	7.40%	7.25%	6.68%	7.55%	7.90%
1-year CP	7.30%	7.30%	7.33%	6.85%	7.45%	7.88%
1-year Gilt	5.66%	5.70%	5.71%	5.57%	6.40%	6.60%
3-year Gilt	5.95%	5.95%	5.91%	5.92%	6.44%	6.64%
5-year Gilt	6.41%	6.43%	6.47%	6.18%	6.45%	6.69%
1-year AAA	6.95%	6.97%	7.13%	6.63%	7.29%	7.49%
3-year AAA	7.08%	7.12%	7.14%	6.76%	7.11%	7.30%
5-year AAA	7.19%	7.19%	7.29%	6.83%	7.11%	7.26%
10-year G-sec	6.67%	6.68%	6.68%	6.53%	6.58%	6.71%
Net LAF (Rs Cr)	317604	303148	121502	239835	-9354	-214135
Forex reserves (\$ bn)	717.06	723.77	687.19	687.03	642.49	638.26

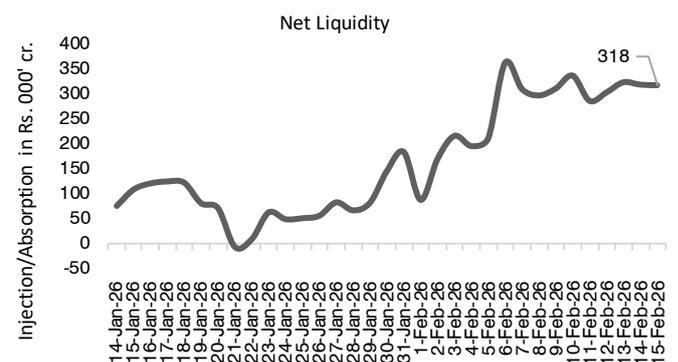
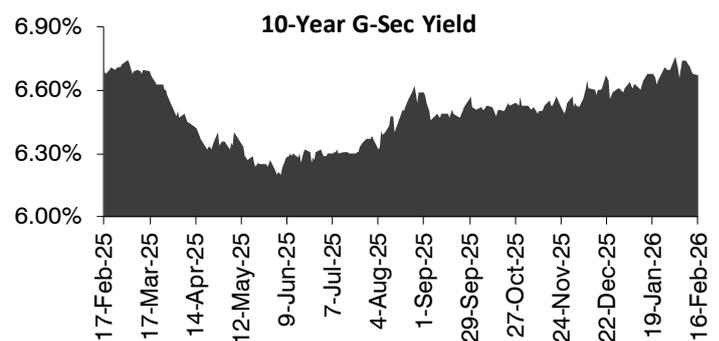
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.47	7.16	7.90	7.95	9.18	9.66
1 Year	5.66	6.95	7.69	7.74	8.97	9.45
3 Year	5.95	7.08	7.82	7.87	9.10	9.58
5 Year	6.41	7.19	8.03	8.08	9.31	9.79
10 Year	6.67	7.35	8.19	8.24	9.47	9.95

Rs. Cr (Debt)	FII Inv 13-Feb	MF Inv 12-Feb
Buy	1,221	24,238
Sell	427	26,814
Net	793	-2,576
Net (MTD)	2,011	-39,208
Net (YTD)	-4,266	-130,015

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*	1.56% (Jan 31, 2026)		-1.45% (Jan 15, 2026)
Bank Deposit Growth*	1.70% (Jan 31, 2026)		-0.94% (Jan 15, 2026)

Capital markets

- Motilal Oswal Alternates raised Rs 8,500 crore (\$930 million) for its fifth private equity vehicle, India Business Excellence Fund V (IBEF V), marking its largest-ever PE fund.
- SKF India is set to invest Rs 653 crore in the construction of a new manufacturing facility in Pune. EaseMyTrip plans to raise up to Rs 500 crore in capital to support expansion across high-potential segments, particularly in hotels and holidays.
- Shriram Properties Ltd bought a 4-acre land in Bengaluru to develop a housing project with an expected revenue of about Rs 600 crore.
- Torrent Power Ltd plans to acquire 100% equity and convertible instruments in Nabha Power Ltd from L&T Power Development Ltd.
- In-Solutions Global Ltd (ISG) received regulatory authorisation from the Reserve Bank of India (RBI) across all three Payment Aggregator categories - online, physical or offline and cross-border.



Global market indices	16-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA	NA
Nikkei 225	56806.41	-0.24	5.32	59.49	45.10
FTSE	10473.69	0.26	2.33	22.03	19.94
Hang Seng	26705.94	0.52	-0.52	15.51	18.06
Taiwan	Closed	NA	NA	NA	NA

Global debt	16-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	NA	4.04	4.24	4.14	4.23	4.47
UK 10-Year (%)	4.41	4.42	4.40	4.58	4.68	4.50
German 10-Year (%)	2.76	2.76	2.84	2.72	2.73	2.42
Japan 10-Year (%)	2.19	2.21	2.18	1.70	1.49	1.34

Domestic	16-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	154098	0.87	8.83	72.83	79.19
Silver (Rs / Kg)	240947	-0.61	-14.52	138.82	145.98
Aluminium (Rs / Kg)	309	0.18	-2.72	23.05	20.10
Copper (Rs / kg)	1210	-2.11	-2.36	34.69	39.07
Lead (Rs / kg)	196	0.56	-0.78	5.12	6.20
Zinc (Rs /Kg)	326	-0.31	1.80	18.64	18.90
Nickel (Rs / kg)	1557	-1.21	-4.98	10.00	14.09

Global	16-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5041.80	2.33	9.14	62.58	72.86
Silver (oz/\$)	7741.00	2.08	-16.23	126.88	140.40
Brent (\$/bbl)	68.65	1.33	7.05	-8.19	-8.15
NYMEX crude (\$/bbl)	Closed	NA	NA	NA	NA

Global markets

- FTSE index closed higher on Monday supported by gains in defence stocks on expectations of higher UK military spending..
- Asian markets were trading mostly lower at 8.30 AM.
- Eurozone Industrial production rose to 1.2% year over year in December 2025 compared to 2.2% gain in November 2025.
- Japan Industrial Production increased 2.6% in December 2025 compared to a decline of 2.2% in November 2025.

Commodity

- Domestic gold prices rose due to safe haven appeal amid rising geopolitical tensions.

Forthcoming results

Date	Company
12-Feb	ABB India Limited

Upcoming market indicators

Date	Indicator	Previous
Feb 16	Japan GDP Price Index YoY Prel Q4	3.4%
Feb 17	UK Unemployment Rate Dec	5.1%
Feb 18	UK Inflation Rate, Jan	3.4%
Feb 20	India Foreign Exchange Reserves Feb/13	-
Feb 24	China Loan Prime Rate 1Y/5Y Feb	3% / 3.5%

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%

Disclaimer: The information contained herein is only for the purpose of information and not for distribution and do not constitute an offer to buy or sell or solicitation of any offer to buy or sell any securities or financial instruments. The information contained in this report is compiled from various sources and external research. Tata Asset Management Pvt. Ltd. and its personnel exercise due care and caution in collecting the data before making this report. In spite of this if any omission, inaccuracy or typing errors occur with regard to the data contained in this, Tata Asset Management Pvt. Ltd. or any of its personnel will not be held responsible or liable. The content hereof does not constitute any form of advice, recommendation or arrangement by Tata Asset Management Pvt. Ltd. and is not intended to be relied upon by readers in making any specific or other decision. The contents of this communication do not seek to market or solicit subscription to Tata Mutual Fund's schemes or to convey their performance or to influence the opinion/behavior of investors

Mutual Fund Investments are subject to market risks, read all scheme related documents carefully