

Daily Market Monitor

February 18, 2026

TATA
mutual fund

Domestic Market Performance

Indian market indices	17-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25725	0.17	0.12	9.38	12.05
BSE Sensex	83451	0.21	-0.14	7.80	9.81
BSE 100	26969	0.23	0.04	9.73	13.06
BSE 200	11678	0.25	0.42	10.14	13.65
BSE 500	36904	0.32	0.20	9.90	13.53
BSE SmallCap	49484	0.82	-0.44	6.10	9.58
BSE MidCap	46193	0.45	0.02	11.23	15.68
BSE LargeCap	9935	0.25	0.51	9.97	13.29
Sectoral indices					
BSE IT	31980	1.15	-15.34	-11.47	-20.65
BSE Oil & Gas	28892	0.15	4.11	14.95	22.82
BSE FMCG	19008	0.87	-0.33	-2.26	-0.91
BSE Auto	62425	0.54	1.81	30.86	27.17
BSE Bankex	68658	0.55	1.02	15.31	22.67
BSE Teck	16770	0.59	-10.43	-3.34	-10.24
BSE Capital Goods	69484	0.76	8.65	10.78	21.76
BSE Consumer Durable	59853	0.85	-0.28	10.06	8.47

Turnover (Rs Cr)	17-Feb	16-Feb
BSE Cash	6863	7506
NSE Cash	95691	89436
NSE F&O	71403623	27261880

Rs. Cr (Equity)	FII Inv 16-Feb	MF Inv 13-Feb	DII Inv 17-Feb
Buy	9,820	15,887	12,483
Sell	10,034	12,365	12,296
Net	-214	3,523	187
Net (MTD)	13,368	-1,586	11,630
Net (YTD)	-20,330	40,769	73,959

	17-Feb	1Day	Month ago	Year ago
USD	90.77	90.71	90.65	86.77
GBP	123.57	123.76	121.31	109.26
Euro	107.52	107.65	105.22	91.03
100 Yen	59.38	59.24	57.24	57.21

Indian markets

- Indian equity benchmark indices closed higher on Tuesday, driven by gains in IT after a sector leader announced a collaboration to develop and deploy advanced enterprise AI solutions.
- The top gainers were Adani Enterprises, ITC, Bharat Electronics, Infosys, and Larsen & Toubro, up 1.77-2.74%.
- The top losers were Kwality Wall's India, Hindalco Industries, Eternal, Tata Steel and Trent, down 1.41-5.00%.

Indian debt

- The interbank call-money rate ended higher at 5.08% on Tuesday compared to 4.60% on Monday.
- Government bond prices were steady on Tuesday, as robust state debt demand and ample liquidity offset supply concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.66% on Tuesday.

Indian Rupee

- The rupee closed lower against the US dollar on Tuesday despite the Reserve Bank of India's (RBI) intervention as demand for dollars was stronger.

Regulatory

- The Insolvency and Bankruptcy Board of India (IBBI) in a discussion paper suggested that the committee of creditors (CoC) record its deliberations on the expected recovery for creditors in comparison with the fair value and liquidation value.

Economy and Government

- NHAI accepted National Highways Infra Trust's offer of Rs 6,220.90 crore for the asset monetisation of two highway sections of 310 kilometres.
- Prime Minister Narendra Modi said India is seeking to position itself as a stabilising force in a world marked by geopolitical churn and economic uncertainty.

Domestic Debt Market Indicators

Instrument	17-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.08%	4.60%	5.40%	4.95%	7.00%	6.00%
3-Month T-Bill	5.27%	5.30%	5.36%	5.38%	6.34%	6.43%
6-Month T-Bill	5.50%	5.47%	5.60%	5.52%	6.47%	6.57%
1-year T-Bill	5.55%	5.54%	5.60%	5.54%	6.40%	6.56%
3-Month CD	7.00%	6.98%	6.85%	6.01%	7.00%	7.40%
6-Month CD	6.90%	6.90%	7.03%	6.22%	7.25%	7.57%
1-year CD	6.85%	6.84%	7.03%	6.38%	7.15%	7.57%
3-Month CP	7.45%	7.40%	7.15%	6.54%	7.25%	7.75%
6-Month CP	7.45%	7.40%	7.25%	6.68%	7.55%	7.90%
1-year CP	7.35%	7.30%	7.33%	6.85%	7.45%	7.88%
1-year Gilt	5.63%	5.66%	5.71%	5.57%	6.40%	6.62%
3-year Gilt	5.92%	5.95%	5.91%	5.92%	6.44%	6.64%
5-year Gilt	6.40%	6.41%	6.47%	6.21%	6.45%	6.68%
1-year AAA	6.95%	6.95%	7.13%	6.63%	7.29%	7.49%
3-year AAA	7.08%	7.08%	7.14%	6.78%	7.11%	7.30%
5-year AAA	7.19%	7.19%	7.29%	6.85%	7.11%	7.26%
10-year G-sec	6.66%	6.67%	6.68%	6.55%	6.58%	6.69%
Net LAF (Rs Cr)	259231	317604	121502	187697	-9354	-181329
Forex reserves (\$ bn)	717.06	723.77	687.19	687.03	642.49	638.26

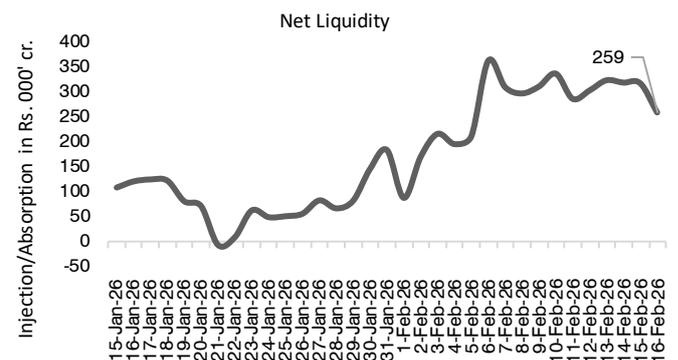
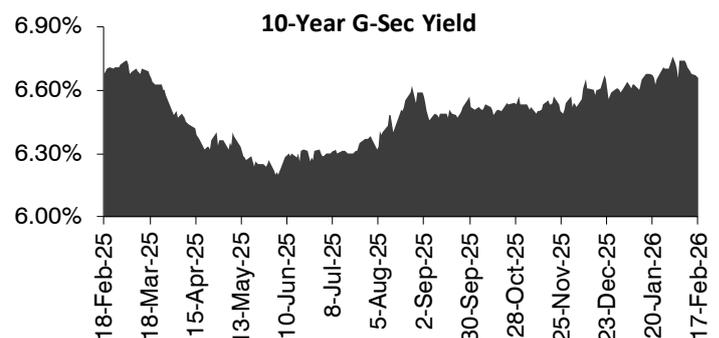
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.50	7.17	7.91	7.96	9.19	9.67
1 Year	5.63	6.95	7.69	7.74	8.97	9.45
3 Year	5.92	7.08	7.82	7.87	9.10	9.58
5 Year	6.40	7.19	8.03	8.08	9.31	9.79
10 Year	6.66	7.35	8.19	8.24	9.47	9.95

Rs. Cr (Debt)	FII Inv 16-Feb	MF Inv 13-Feb
Buy	830	13,921
Sell	99	16,644
Net	731	-2,724
Net (MTD)	2,742	-41,931
Net (YTD)	-3,535	-132,738

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
WPI	1.81% (Jan'26)	-1.21% (Oct'25)	2.51% (Jan'25)
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

- Adani Group plans to invest \$100 billion to build data centers for artificial intelligence (AI) in India by 2035.
- Black Box Ltd entered into definitive agreements to acquire Brazil-based 2S Inovações Tecnológicas for Rs 275 crore, with completion expected by March 2026 as part of its international expansion and revenue growth plans.
- Infosys announced a strategic collaboration with American artificial intelligence company Anthropic to develop and deploy advanced enterprise AI solutions for companies across telecommunications, financial services, manufacturing, and software development.
- Delhivery Ltd. entered a pact with electric mobility startup RIDEV to deploy 150 electric vehicles to scale green logistics.
- Navikenz raised \$11.6 million in a round led by Sekar PRC, Sudip Nandy with existing investors participating.



Global market indices	17-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49533.19	0.07	0.35	17.93	11.20
Nikkei 225	56566.49	-0.42	4.88	58.82	44.40
FTSE	10556.17	0.79	3.14	22.99	20.39
Hang Seng	Closed	NA	NA	NA	NA
Taiwan	Closed	NA	NA	NA	NA

Global debt	17-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.05	4.04	4.24	4.13	4.23	4.47
UK 10-Year (%)	4.39	4.41	4.40	4.54	4.68	4.53
German 10-Year (%)	2.74	2.76	2.84	2.71	2.73	2.48
Japan 10-Year (%)	2.14	2.19	2.18	1.73	1.49	1.39

Domestic	17-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	151865	-1.45	7.25	70.32	78.13
Silver (Rs / Kg)	232955	-3.32	-17.36	130.90	142.80
Aluminium (Rs / Kg)	308	-0.28	-2.99	22.71	18.90
Copper (Rs / kg)	1212	0.19	-2.17	34.95	40.13
Lead (Rs / kg)	197	0.18	-0.61	5.31	7.08
Zinc (Rs /Kg)	323	-0.83	0.95	17.66	19.73
Nickel (Rs / kg)	1549	-0.51	-5.46	9.44	13.16

Global	17-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4994.44	-0.94	8.12	61.05	73.18
Silver (oz/\$)	7677.00	-0.83	-16.92	125.00	138.86
Brent (\$/bbl)	67.42	-1.79	5.13	-9.83	-10.37
NYMEX crude (\$/bbl)	62.33	-0.89	4.86	-12.80	-12.69

Global markets

- Wall Street stocks closed marginally higher on Tuesday boosted by gains in technology and financial shares.
- 10-year US bond yield ended higher at 4.05% as investors remained caution ahead of key economic data releases.
- FTSE index closed higher on Tuesday supported by signs of a cooling labour market, strengthening expectations of a potential interest rate cut.
- Asian markets were trading mostly higher at 8.30 AM.
- US NY Empire State Manufacturing Index fell to 7.1 in February 2026 compared to 7.7 in January 2026.
- Eurozone ZEW Indicator of Economic Sentiment eased by 1.4 points to 39.4 in February 2026 compared to 40.8 in January 2026.
- UK unemployment rate rose to 5.2% in December 2025 compared to 5.1% in November 2025.
- Japan trade deficit decreased significantly to JPY 1,152.7 billion in January 2026 compared to JPY 2,741.7 billion in the same month a year earlier.

Commodity

- Crude oil prices fell by 56 cents to \$62.33 a barrel on the NYMEX after signs of progress in nuclear talks between US-Iran reduced concerns over potential supply disruptions.
- Domestic gold prices declined due to strong dollar index and profit booking.

Forthcoming results

Date	Company
13-Feb	ABB India Limited

Upcoming market indicators

Date	Indicator	Previous
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%
Feb 26	Japan Construction Orders YoY JAN	20.2%
Feb 27	India Fiscal Year GDP Growth 2nd Est 2025-26	6.5%

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%

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