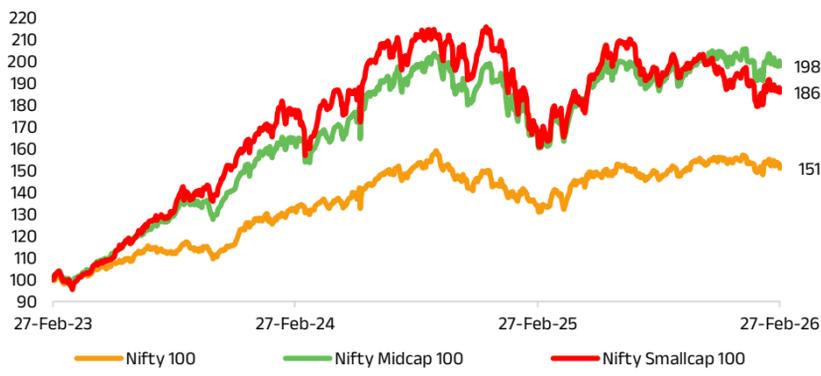


Broad Indices Historical Movement



Source: NSE

Broad Indices

	27-Feb-26	1 Day	1 Week	1 Month
Nifty 50	25,178.65	-1.25%	-1.54%	0.01%
Nifty 100	25,897.55	-1.26%	-1.22%	0.74%
Nifty 200	14,121.05	-1.23%	-1.12%	1.12%
Nifty 500	23,166.85	-1.20%	-0.98%	1.52%
Nifty Large Midcap 250	16,442.55	-1.17%	-0.77%	2.09%
Nifty Midcap 150	21,847.35	-1.09%	-0.32%	3.45%
Nifty Next 50	69,710.90	-1.30%	0.37%	4.52%
Nifty Smallcap 250	15,881.05	-1.04%	-0.49%	3.49%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Smart Beta Index

Index	27-Feb-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,360.95	-1.76%	-0.72%	3.39%
NIFTY 500 Value 50	16,854.05	-0.76%	1.62%	7.56%
Nifty 200 Quality 30	20,146.80	-0.98%	-1.07%	-3.87%
Nifty 50 Equal Weight	33,083.10	-1.31%	-0.82%	1.86%
NIFTY Alpha Low Volatility 30	27,197.20	-1.69%	-0.75%	3.00%
Nifty High Beta 50	3,781.60	-1.70%	-1.01%	2.59%
Nifty Low Volatility 50	25,153.25	-1.38%	-0.65%	0.78%
Nifty Midcap150 Momentum 50	61,701.40	-1.52%	-0.79%	3.79%
Nifty PSE	10,456.10	-0.69%	0.86%	7.45%
Nifty SME Emerge	12,701.65	0.00%	-2.84%	-0.39%
Nifty 100 ESG	5,033.70	-1.23%	-1.21%	-0.05%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Sector Indices

Index	27-Feb-26	1 Day	1 Week	1 Month
Nifty Auto	28,158.85	-1.86%	1.12%	6.04%
Nifty Bank	60,529.00	-1.08%	-1.05%	2.24%
Nifty Consumption	11,537.10	-1.48%	-1.48%	0.81%
Nifty Financial	27,869.75	-1.55%	-1.21%	3.00%
Nifty FMCG	51,142.20	-1.69%	-1.22%	-0.40%
Nifty Healthcare	14,871.10	-1.41%	2.13%	6.59%
Nifty IT	30,603.85	0.16%	-4.38%	-20.65%
Nifty Media	1,416.15	0.60%	-0.75%	6.31%
Nifty Metal	12,240.65	-1.67%	2.09%	3.47%
Nifty MNC	31,703.10	-1.29%	1.58%	5.46%
Nifty Pharma	22,952.35	-1.50%	2.23%	5.34%
Nifty Realty	780.60	-2.26%	-4.89%	2.79%
Nifty Energy	37,045.20	-0.37%	1.27%	11.27%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Nifty 50 Top 5 Gainers

Company	27-Feb-26	Prev_Day	% Change	1 Week
HCL Tech	1,389.10	1,373.50	1.14	-3.30
Infosys	1,300.10	1,289.10	0.85	-3.92
Indian Oil	187.47	186.47	0.54	7.87
NA	NA	NA	NA	NA
NA	NA	NA	NA	NA

Source: NSE

Nifty 50 Top 5 Losers

Company	27-Feb-26	Prev_Day	% Change	1 Week
Sun Pharma	1,737.00	1786	-2.73	0.73
Bharti Airtel	1,879.30	1930	-2.61	-4.96
HDFC Standard Life	715.30	734	-2.55	-1.83
Shree Cements Limited	26,075.00	26745	-2.51	-1.64
M&M	3,397.40	3485	-2.50	-0.45

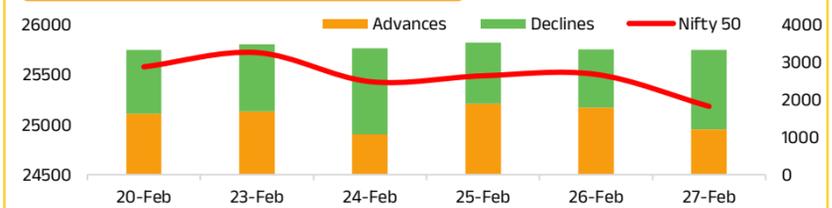
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

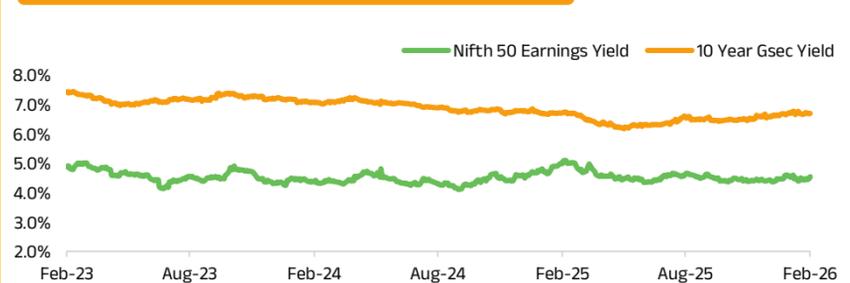
Indian equity markets witnessed a significant decline as escalating geopolitical tensions and growing concerns related to AI driven disruption affected investor sentiment. Investors also reacted to the rise in crude oil prices after diplomatic discussions between the U.S. and Iran, which were intended to ease tensions regarding Tehran's nuclear program.

Jio Financial Services Ltd (JFSL) said it has infused Rs. 2,000 crore into its subsidiary Jio Credit Ltd to support business growth. The company has subscribed to and been allotted 3,35,71,923 equity shares of Rs. 10 each of Jio Credit Ltd, a wholly owned non-banking financial subsidiary, at a premium of Rs. 585.70 per share, aggregating Rs. 1,999.88 crore.

India's Leela Palaces, Hotels & Resorts is betting that a tight supply of luxury hotel rooms and rising demand from affluent travellers will drive revenue and earnings growth in fiscal 2027.

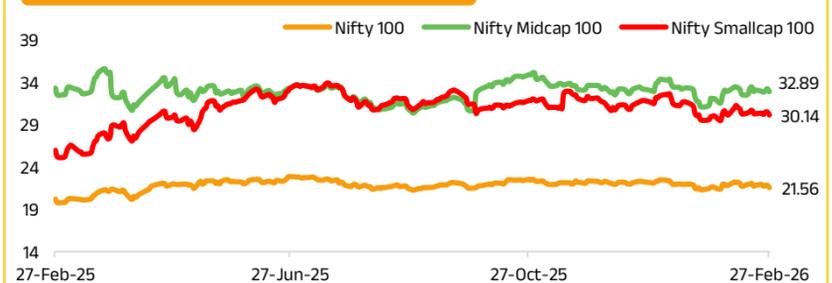
Wire & Cable (W&C) companies reported healthy revenue and EBIT growth in the December 2025 quarter (Q3), driven by a sharp rally in commodity prices and an uptick in volume growth. Wires outpaced cables, supported by channel stocking, a lower base, and faster pricing pass-through.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



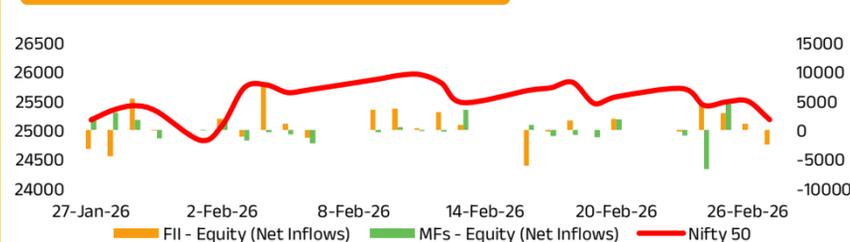
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	YTD	INR Cr.
FII	-2429.16	22,615	-13,347	-13,347	
MF**	4451.97	-4,138	38,217	38,217	
DII	12292.81	39,106	1,04,365	1,04,365	

Source: SEBI, NSDL;**As on 25th Feb 2026;

F&O Trends

	Latest	Previous	Change %
Near Futures	25338.60	25635.80	-1.16%
Near Basis	159.95	139.25	14.87%
Mid Futures	25499.00	25793.00	-1.14%
Mid Basis	320.35	296.45	8.06%
Near Open Interest (Cr.)	1.43	1.31	8.82%
Mid Open Interest (Cr.)	0.14	0.09	53.37%
Rollover (%)	11.52	6.88	67.41%
Put Call Ratio (OI)	0.88	0.88	0.41%
Put Call Ratio(Vol)	1.02	1.00	2.29%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1943	1725	30894
Index Options	4444399	4474386	389048
Stock Futures	20270	20594	440306
Stock Options	17360	17191	20154
Total	4483971	4513896	880403

Source: NSE

Global Equity Market

Global Indices	27-Feb-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3756.96	-0.44%	-0.42%	-1.38%
Nasdaq 100 (U.S.)	24960.03	-0.30%	-0.21%	-3.78%
FTSE (U.K.)	10910.55	0.59%	2.09%	6.88%
DAX Index (Germany)	25284.26	-0.02%	0.09%	1.57%
CAC 40 Index (France)	8580.75	-0.47%	0.77%	5.25%
SSE Composite (China)	4162.88	0.39%	NA	0.56%
Nikkei (Japan)	58850.27	0.16%	3.56%	10.34%
Kospi (South Korea)	6244.13	-1.00%	7.50%	22.80%
HangSeng (Hong Kong)	26630.54	0.95%	0.82%	-1.83%
Strait Times (Singapore)	4995.07	0.62%	-0.45%	1.46%
Ibovespa Sao Paulo (Brazil)	188786.98	-1.16%	-0.92%	3.78%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	9198.60	0.25%	1.29%	2.87%
Jakarta Composite (Indonesia)	8235.49	0.00%	-0.44%	-8.29%
KLSE (Malaysia)	1716.61	-1.40%	-2.07%	-3.08%

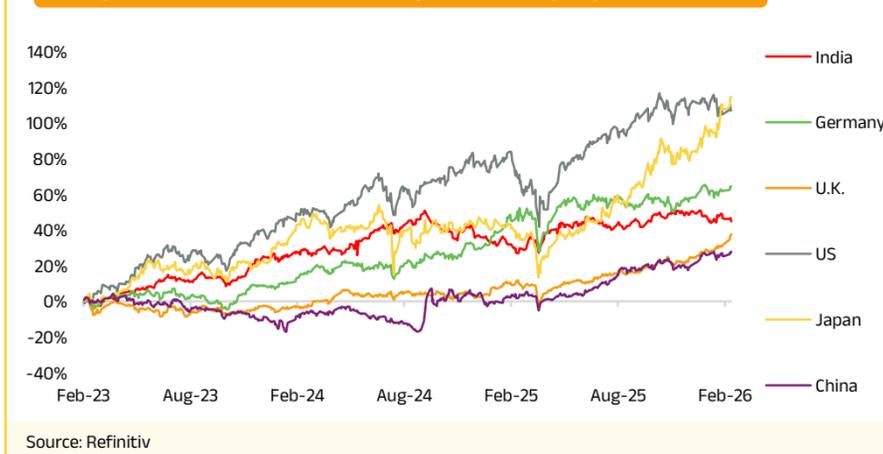
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

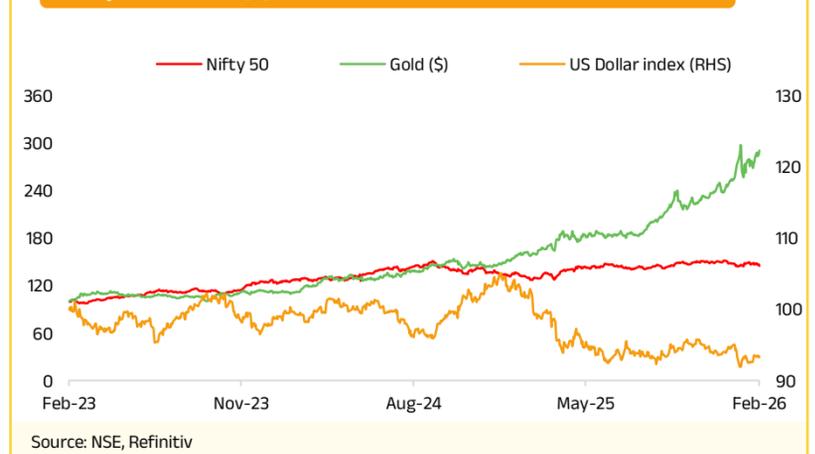
Commodity Prices	27-Feb-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,58,585	0.63%	2.67%	-0.19%
Gold (\$/oz)	5,277.29	1.74%	3.41%	1.70%
Silver (INR/1 kg)	2,66,127	2.20%	6.40%	-22.95%
Silver (\$/oz)	93.82	6.19%	10.93%	-16.97%
Brent Crude(\$/bbl)	75.72	1.47%	1.50%	6.20%
Crude Oil (INR/1 bbl)	5,928.00	-0.37%	-1.58%	5.95%
NYMEX Crude(\$/bbl)	66.86	2.86%	0.56%	8.12%
Natural Gas (INR/1 mmbtu)	257.00	-1.46%	-5.38%	-46.82%
Aluminium (INR/1 kg)	313.85	0.63%	1.78%	-1.57%
Copper (INR/1 kg)	1,241.25	0.86%	4.59%	-1.57%
Nickel (INR/1 kg)	1,632.50	-0.41%	3.04%	-4.48%
Lead (INR/1 kg)	194.75	-0.71%	1.20%	0.26%
Zinc (INR/1 kg)	331.25	0.45%	1.30%	2.00%
Mentha Oil (INR/1 kg)	1,042.90	-0.21%	-0.16%	-3.22%
Baltic Dry Index	2,140	1.09%	4.75%	7.05%

Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Comparative Performance of Major Global Equity Market



Nifty 50 vs Gold (\$) vs US Dollar Index- Rebase to 100



Term of the Day



Equity Contagion Effect

Definition: The Equity Contagion Effect refers to the phenomenon where negative developments in one market, sector, or region trigger widespread declines in equity prices across other markets, even when those markets do not share direct economic linkages. It reflects how fear, sentiment, and investor behavior can transmit shocks rapidly through global or domestic equity markets.



Explanation

Equity contagion occurs when negative news in one market prompts investors to sell assets in other markets, often to reduce risk or cover losses. This spillover effect intensifies during financial stress, causing markets to move together regardless of fundamentals and increasing volatility even for strong companies. Contagion is driven by global interconnectedness, shared investor exposure, algorithmic trading, and shifts in risk sentiment. Events such as geopolitical tensions, banking crises, or major index corrections can quickly spread across borders. Understanding this effect helps investors and policymakers assess systemic risks, strengthen diversification, and design measures to prevent broader market instability.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.36	1.67	13.27	15.76
Flexi Cap Fund	1.81	0.36	13.16	17.10
Mid Cap Fund	3.87	0.74	18.36	22.29
Large & Mid Cap Fund	2.83	1.28	15.89	19.34
Small Cap Fund	4.03	-3.03	13.76	19.31
Multi Cap Fund	2.78	-0.02	14.43	19.36
Focused Fund	1.93	1.00	13.30	16.78
Value Fund	2.12	3.37	14.62	19.60
Contra Fund	1.85	2.30	14.85	20.61
ELSS	1.69	-0.01	13.26	17.22
Equity Savings	0.90	2.32	8.65	10.21
Arbitrage Fund	0.63	2.92	6.07	6.80
Dividend Yield Fund	1.65	3.97	14.43	19.63
Aggressive Hybrid Fund	1.76	1.35	12.22	14.84
Balanced Advantage	1.14	1.49	9.55	12.05

Source: MFI 360 Explorer; Less than 1 year returns are absolute and greater than 1 year returns are CAGR. Category wise parent schemes are selected, which are available for investment to calculate average returns.

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