

Weekly Market Insights & Strategies



16 February 2026

Weekly Market Recap: India & Global

Monday turned out positive for investors, Nifty closed high by 0.68% and Sensex was up by 0.58%. The benchmark indices extended their gains driven by optimism over India-US deal with robust buying in public sector banks, consumer durables and realty stocks. SBIN, TITAN, Ultratech Cement were the gainers with Power grid, NTPC, ITC were the laggards. Indian Equity benchmarks extended gains as early indications of recovery in FPI inflows following the trade agreement. Nifty 50 was up to 25935.15 and BSE Sensex closed at 84273.92. Twelve of the 16 major sectors advanced on Tuesday. Auto stocks rose 1.4%, while metals stocks added 0.8%. Among the Sensex constituents, Eternal, Tata Steel, Mahindra & Mahindra, were among the gainers. On the other hand, HCL Technologies, Bajaj Finance, Bharti Airtel, were among the laggards. Wednesday, traded flat, with gains in PSU banks and Auto shares offset by IT Stocks. IT stocks was the major drag down with fall of 1.76% due to AI fear surrounding software companies. Stock-specific action dominated, with auto and healthcare names gaining; Eicher Motors surged 5.98%, Apollo Hospitals rose 4.55%, and Max Healthcare added 2.56%. On the downside, Coal India dropped 2.38%, TCS fell 1.90%, and ONGC lost 1.45%.

Indian shares fell on Thursday, with IT shares hovering near a 10-month low, on concerns over artificial intelligence disruption while fading expectations of a near-term U.S. rate cut also weighed. Nifty closed down by 0.57% with Tech Mahindra leading the fall with 6.40%. January 2026 data of CPI inflation was up by 2.75% driven by precious metal and food division. Once again IT sector took the driver seat and dragged down the market on Friday, ending the day down with 1.30%. IT index was again down by whopping 1.44% following a fall of 5.51% on Thursday. US Stocks fell this week as fears of AI disruption across several different business models beyond software spread across industries as logistics, wealth management, insurance brokerage, office REITs, and others. This week, Dow Jones was down 1.23%, S&P 500 down 1.39%, Nasdaq was down 2.10%, Nikkei 225 was down 1.20% and Hang Seng and KOSPI was up 0.03% and 8.21% respectively.

Indian Equity Market Performance & Key Valuation Ratio

Index	13-02-2026	% Change (WOW)	P/E	P/B	Dividend Yield
Broader Indices					
Nifty	25471.10	-0.87%	22.24	3.46	1.21
BSE Sensex	82626.76	-1.15%	22.69	4.43	1.1
BSE 150 MidCap Index	16030.52	-0.22%	34.34	5.28	0.82
BSE 250 SmallCap Index	6350.84	0.62%	29.46	3.76	0.74
BSE 250 LargeMidCap Index	10944.82	-0.66%	24.12	4.42	1.07
Sectoral Indices					
BSE Fast Moving Consumer Goods	18734.01	-1.44%	35.13	7.79	1.48
BSE Commodities	8243.26	-0.14%	25.28	3.36	0.95
BSE Consumer Discretionary	9666.74	1.63%	49.3	7.04	0.67
BSE Energy	11973.97	-2.36%	10.8	1.98	2.17
BSE Financial Services	13134.87	0.19%	18.23	3.12	0.88
BSE Healthcare	42636.95	1.62%	37.8	6.47	0.53
BSE Information Technology	31591.23	-8.74%	24.01	6.6	2.55
BSE Auto	62588.67	2.24%	36.28	6.91	1.1
BSE Bankex	67475.91	-0.11%	15.98	2.39	0.98
BSE Metal	39125.58	-0.59%	20.58	3.34	1.38
BSE Oil & Gas	28595.04	-1.97%	9.52	1.7	2.3
BSE Power	6713.57	-1.48%	31.58	4.25	1.26
BSE Realty	6401.8	-0.49%	40.28	5.14	0.36

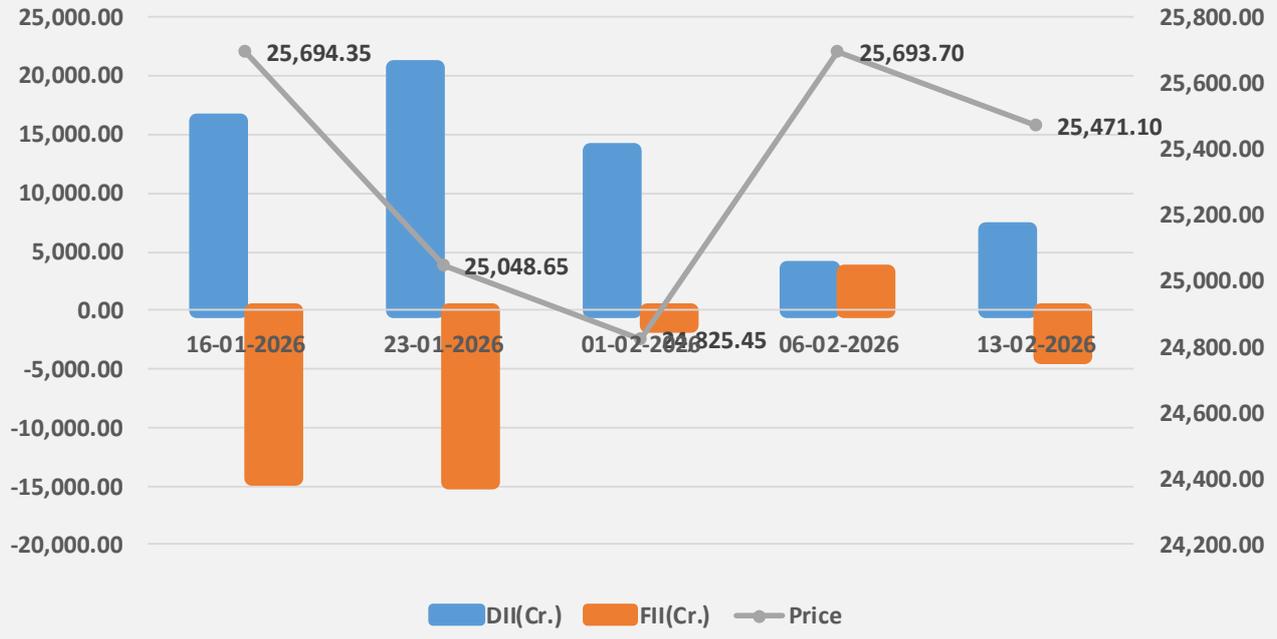
BSE-Gainers

Symbol	LTP	%Change (WoW)	%Change (MoM)
State Bank of India Ltd	1198.6	12.40%	16.60%
Bajaj Finance Ltd	1024.8	4.40%	8.30%
Trent Ltd	4252	3.40%	8.10%
Tata Steel Ltd	203.2	3.10%	7.40%
Larsen & Toubro Ltd	4173.9	2.60%	8.00%

BSE-Losers

Symbol	LTP	%Change (WoW)	%Change (MoM)
Infosys Ltd	1369.1	-9.20%	-14.40%
HCL Technologies Ltd	1455.2	-8.70%	-12.80%
Tata Consultancy Services Ltd	2692.2	-8.50%	-15.70%
TechMahindra Ltd	1534.4	-5.30%	-3.40%
Hindustan Unilever Ltd	2305.2	-4.90%	-2.10%

FII & DII Investment Flow Vs NIFTY50

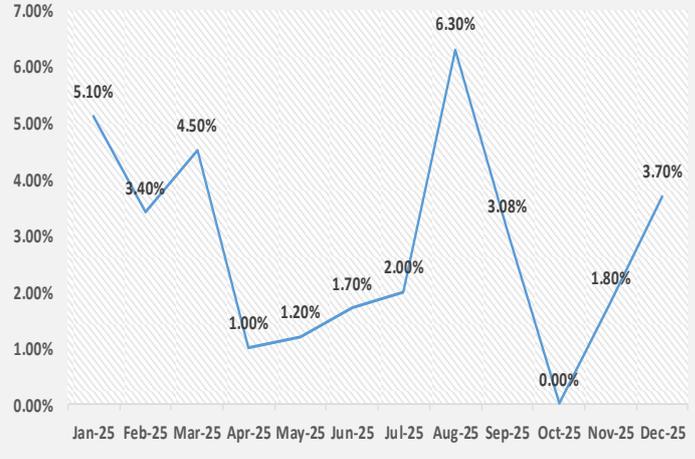


Macro-Economic Performance: India

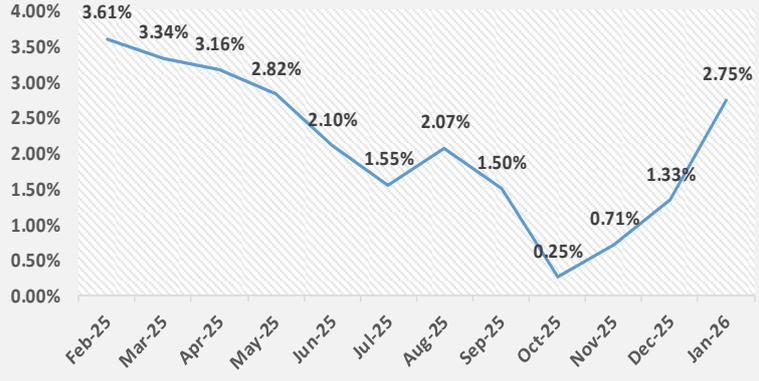
IIP (YoY)



Infrastructure Output (YoY)



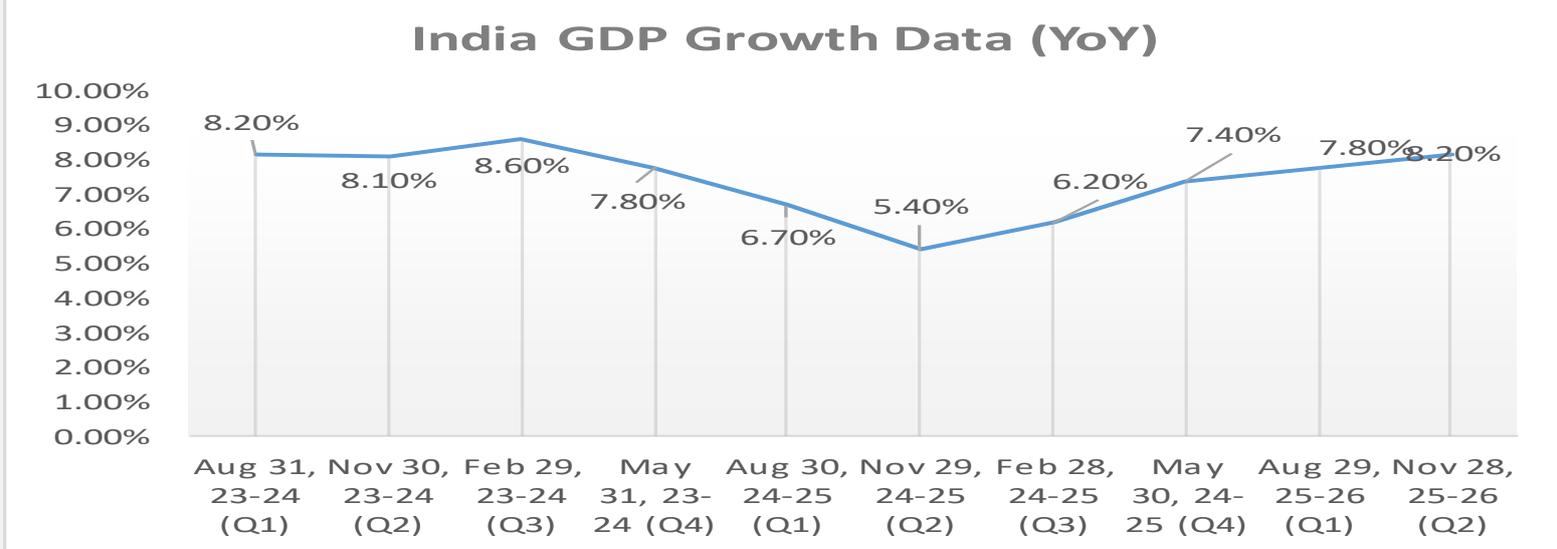
CPI (YoY)



WPI (YoY)



Market View from Research Desk:



NIFTY (25,471.10): The last week reflected a mild risk-off trend globally with limited domestic stress. The decline in Nifty 50 alongside sharper falls in the S&P 500, Dow Jones Industrial Average, and Nasdaq Composite suggests pressure on risk assets, particularly impacting Indian IT and export-oriented stocks. The decline in industrial metals (copper, silver, platinum) indicates weaker global demand expectations, negatively affecting Indian metal and commodity sectors. Brent crude's slight rise is marginally negative for oil-import-dependent sectors such as aviation and paints, but supportive for upstream energy companies. The fall in India's 10-year bond yield is positive for banks, NBFCs, real estate, and autos due to improved rate outlook. A stable USD/INR near ₹90.55 signals no major currency stress. Negatively affected sectors: IT, metals, commodity exporters, oil-sensitive industries. Positively affected sectors: Banking, NBFCs, real estate, upstream energy, and domestic consumption.

India continued to stand out as one of the world's fastest-growing major economies, with robust infrastructure investment and deepening ties with Singapore expected to bolster the aviation and construction sectors and support sustained expansion. The services sector and civil aviation improvements were highlighted as key growth drivers. In the United States, policy shifts including plans to roll back certain tariffs on steel and aluminium aimed at reducing consumer price pressures were reported, with implications for the manufacturing, trade, and consumer goods sectors. Markets reacted to signs of global policy uncertainty and shifting trade dynamics, with investors weighing opportunities in non-U.S. equities and energy stocks as the U.S.'s economic strategies evolved. In Europe, sentiment improved as euro-zone investor morale rose sharply in February, signalling potential strength in financial markets and investment flows, although broader productivity and green policy debates continue to influence industrial strategy. Meanwhile in Asia, Singapore raised its 2026 growth forecast driven by strong trade and tech investment suggesting positive spill overs for the technology, manufacturing, and export sectors even as global fragility was flagged as a risk.

The NIFTY 50 witnessed a volatile but range-bound week, closing at 25,471.10 with a weekly loss of 0.87%, after failing to sustain above the 26,000 psychological mark. The index registered a high near 26,009 and a low around 25,444 during the week, indicating selling pressure at higher levels and support-based buying on dips. After starting strong with gains on 1st 2 sessions, momentum faded as the index formed lower highs and closed negative in the last two sessions, suggesting short-term exhaustion. The weekly structure indicates consolidation within a broader uptrend, but near-term bias has turned cautious. The resistance range is between 25924-26423 and support stands between 24861-25359.

In the next week global markets will focus on key inflation, growth, and central bank cues. The US will release Core PCE Price Index, FOMC Minutes, Employment data, and Housing numbers, Japan's Q4 GDP and National CPI will indicate growth and inflation trends, while the UK's CPI and Retail Sales will reflect price pressure and consumer demand. In India, WPI Inflation and HSBC PMI Flash data will provide signals on inflation and economic activity.

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