

Pre-Session: GIFT Nifty signals subdued start amid muted global cues**Morning Market Snapshot – 13 Feb 2026 (Friday)**

- Indian equity benchmarks Sensex and Nifty are expected to open on a negative note on February 13, despite GIFT Nifty trading around the 25,720 level.
- In the previous session, markets ended lower amid renewed concerns over the impact of artificial intelligence on IT stocks, with the Nifty closing near the 25,750 mark and snapping its four-day winning streak.
- India's consumer price index (CPI)-based inflation rose to 2.75 per cent in January 2026, driven by higher food and precious metal prices, according to the first set of data released under the new CPI series with the base year revised to 2024 from 2012. Inflation in rural areas stood at 2.73 per cent, while urban inflation was recorded at 2.77 per cent, as per data released by the Ministry of Statistics on Thursday.
- On Thursday, the 30-share benchmark index ended at 83674.92 down by -558.72 points or by -0.66 % and then NSE Nifty was at 25807.2 down by -146.65 points or by -0.57 %.
- On the global front, Asian markets were trading lower on Friday after renewed concerns over artificial intelligence (AI) disruption in the US dragged Wall Street benchmarks down, with the S&P 500 logging a third straight session of losses. Last checked, Japan's Nikkei 225 index fell 1.69 per cent, South Korea's KOSPI index was down 0.5 per cent, and Australia's S&P/ASX 200 was down 1.3 per cent. US equity indexes settled sharply lower on Thursday as investors moved out of technology stocks while assessing a heavy stream of economic data and corporate earnings reports. The S&P 500 fell 1.57 per cent, tech-heavy Nasdaq Composite dropped 2.03 per cent, and the Dow Jones Industrial Average was down 1.34 per cent. Back home, Top traded Volumes on NSE Nifty – Wipro Ltd. 40899346.00, Eternal Ltd. 34873811.00, HDFC Bank Ltd. 33872203.00, State Bank of India 33214985.00, Infosys Ltd. 26048896.00,
- On NSE, total number of shares traded was 434.49 Crore and total turnover stood at Rs. 119233.39 Crore. On NSE Future and Options, total number of contracts traded in index futures was 94780 with a total turnover of Rs. 16253.79 Crore. Along with this total number of contracts traded in stock futures were 1447007 with a total turnover of Rs. 98741.56 Crore. Total numbers of contracts for index options were 53487574 with a total turnover of Rs. 9051205.66 Crore. and total numbers of contracts for stock options were 9726888 with a total turnover of Rs. 696982.88 Crore.
- The FII's on 12/02/2026 stood as net buyer in equity and debt. Gross equity purchased stood at Rs. 19372.51 Crore and gross debt purchased stood at Rs. 243.80 Crore, while the gross equity sold stood at Rs. 16259.66 Crore and gross debt sold stood at Rs. 436.57 Crore. Therefore, the net investment of equity and debt reported were Rs. 3112.85 Crore and Rs. -192.77

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