

**Pre-Session: Markets likely to open lower; Asia markets fall****Morning Market Snapshot – 13 Mar 2026 (Friday)**

- Indian equity benchmarks, Sensex and Nifty, are expected to open on a weak note on March 13, following negative cues from GIFT Nifty, which was trading lower around 23,584 during early trade.
- In the previous session, domestic equity indices extended their losses for the second consecutive day on March 12. Market sentiment remained under pressure due to rising geopolitical tensions, which pushed crude oil prices above USD 100 per barrel. Additionally, weak global cues, depreciation in the Indian rupee, and continued selling by foreign institutional investors (FIIs) further weighed on investor confidence.
- On Thursday, the 30-share benchmark index ended at 76034.42 down by -829.29 points or by -1.08 % and then NSE Nifty was at 23639.15 down by -227.7 points or by -0.95 %. On the global front, most markets in the Asia-Pacific region were trading with losses as the possibility of a protracted tension in the Middle East sparked fears of a weak economic outlook.
- Japan's Nikkei 225 and South Korea's Kospi were trading 1.13 per cent and 1.23 per cent down, respectively. Meanwhile, Australia's S&P ASX 200 rose 0.25 per cent.
- Overnight, the US share indices ended lower as risk-off sentiment prevailed. The S&P 500 and the Dow Jones Industrial Average ended 1.52 per cent and 1.56 per cent down, respectively.
- Back home, Top traded Volumes on NSE Nifty – Eternal Ltd. 65732459.00, HDFC Bank Ltd. 46107561.00, Coal India Ltd. 27328045.00, Kotak Mahindra Bank Ltd. 25048123.00, Tata Steel Ltd. 24413736.00,
- On NSE, total number of shares traded was 503.48 Crore and total turnover stood at Rs. 123891.41 Crore.
- On NSE Future and Options, total number of contracts traded in index futures was 224242 with a total turnover of Rs. 35358.11 Crore. Along with this total number of contracts traded in stock futures were 1417217 with a total turnover of Rs. 90384.90 Crore. Total numbers of contracts for index options were 51849058 with a total turnover of Rs. 8138450.59 Crore. and total numbers of contracts for stock options were 6648640 with a total turnover of Rs. 442072.97 Crore.
- The FIIs on 12/03/2026 stood as net buyer in equity and debt. Gross equity purchased stood at Rs. 12624.03 Crore and gross debt purchased stood at Rs. 295.56 Crore, while the gross equity sold stood at Rs. 18535.93 Crore and gross debt sold stood at Rs. 585.78 Crore. Therefore, the net investment of equity and debt reported were Rs. -5911.90 Crore and Rs. -290.22.

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