

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	85,632.68	85,347.40	85,609.40	85,187.84	85,231.92	-400.76	-0.47
NIFTY	26,192.15	26,109.55	26,179.20	26,052.20	26,068.15	-124.00	-0.47

BOURSES CLOSED THE WEEK WITH POSITIVE NOTE

The 30-share BSE Sensex was down by 400.76 points or 0.47% to settle at 85,231.92 and the Nifty was down by 124.00 points or 0.47% to settle at 26,068.15. The BSE Mid-Cap was down by 1.30% and BSE Small Cap was down by 1.30%. On the sectoral front, there were no gaining index. On the flip side, Auto, FMCG, Capital Goods, Oil & Gas, Banks, Consumer Durables Healthcare, Metal, IT and Realty were losing indices. Maruti, Mahindra & Mahindra, TMPV, ITC and Asian Paint were the top gainers on the Sensex; on the flip side, Tata Steel, HCL Tech, Bajaj Finance, Bajaj Finserv and BEL were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
MARUTI	16,010.00	15,801.00	1.32
TATACONSUM	1,184.50	1,173.90	0.90
MAXHEALTH	1,179.10	1,168.90	0.87
INDIGO	5,835.00	5,785.50	0.86
M&M	3,747.00	3,716.70	0.82

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
JSWSTEEL	1,135.90	1,170.00	-2.91
HINDALCO	777.35	799.80	-2.81
TATASTEEL	168.00	172.46	-2.59
BAJFINANCE	1,005.00	1,028.60	-2.29
HCLTECH	1,608.80	1,645.40	-2.22

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,74,99,833	998.00	1,751.86
KOTAKBANK	78,38,791	2,086.50	1,644.72
ICICIBANK	1,14,83,537	1,369.00	1,572.39
RELIANCE	96,15,214	1,543.70	1,489.72
BHARTIARTL	67,20,937	2,165.00	1,453.49

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	2,84,11,074	168.00	481.26
HDFCBANK	1,74,99,833	998.00	1,751.8
ETERNAL	1,37,27,411	302.00	416.63
POWERGRID	1,29,41,393	277.60	359.05
ICICIBANK	1,14,83,537	1,369.00	1,572.3



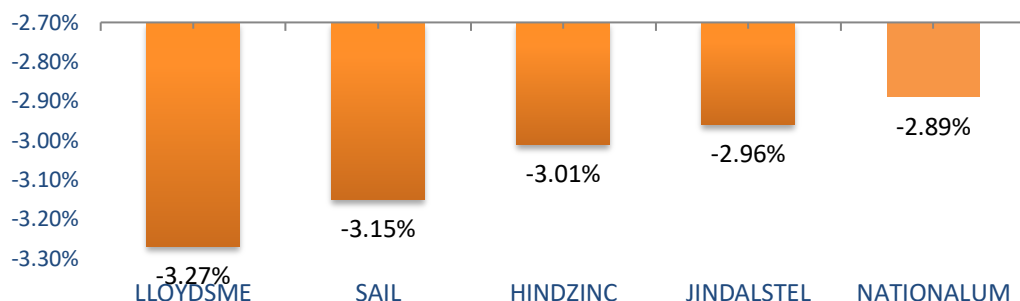
Indian equity benchmarks settled near the day's low points on Friday amid weak global cues. Indices made a slightly negative start and remained under selling pressure throughout day, as traders were cautious after India's flash Purchasing Managers' Index (PMI) data report showed that India's private sector activity expanded at its slowest pace in six months in November. In the last leg of trade, the markets extended their losses and ended lower amid selling in most of the sectoral stocks. Sentiments were subdued as the government data showed that the growth of India's eight key infrastructure sectors remained flat in October as expansion in output of petroleum refinery products, fertiliser and steel was offset by a contraction in coal and electricity production. Traders remained cautious as data released by S&P Global showed the HSBC Flash India Composite Output Index, which measures the combined performance of India's manufacturing and services sectors, fell to 59.9 in November from 60.4 in October, marking a six-month low.

On Global front: European markets were trading lower as investors worried about overvalued tech valuations and an uncertain path for U.S. monetary policy. Asian markets ended in red after the Ministry of Internal Affairs and Communications of Japan said overall consumer prices in Japan were up 3.0 percent on year in October.
Source: Ace Equity

NEWS BULLETIN

- **KNR Constructions** has received Letter of Acceptance (LoA) from Musi Riverfront Development Corporation for 'Construction of an Iconic bridge across Mir Alam Tank connecting Bengaluru National Highway at Shastripuram to Chintalmet under Engineering, Procurement and Construction (EPC) Mode' worth Rs 319.24 crore excluding GST. The construction period for the said project is 24 months.
- **Jhandewalas Foods** has received an order valued at Rs 4.07 crore for the supply of butter from Hocco, under which the company has been empanelled as a new vendor.
- **Groww** has reported 7.37% rise in its net profit at Rs 354.03 crore for the quarter ended September 30, 2025 as compared to Rs 329.74 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : METAL



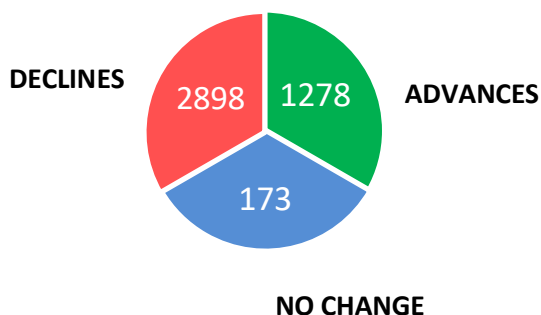
S&P BSE: METAL

CLOSING: 33,611.97

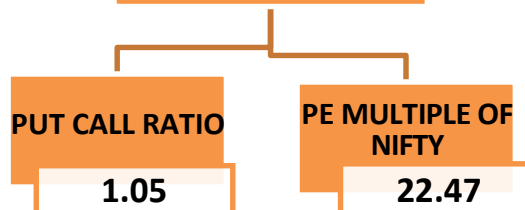
CHANGE: - 809.50

CHANGE: - 2.35%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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