

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	85,641.90	85,325.51	85,553.51	85,053.00	85,138.27	-503.63	-0.59
NIFTY	26,175.75	26,087.95	26,154.60	25,997.85	26,032.20	-143.55	-0.55

INDICES EXTENDED LOSSES FOR THE SECOND DAY OF THE WEEK

The 30-share BSE Sensex was down by 503.63 points or 0.59% to settle at 85,138.27 and the Nifty was down by 143.55 points or 0.55% to settle at 26,032.20. The BSE Mid-Cap was down by 0.14% and BSE Small Cap was down by 0.49%. On the sectoral front, Auto and Consumer Durables were gaining indices. On the flip side, Banks, Realty, Metal FMCG, Oil & Gas, IT, Capital Goods and Healthcare were losing indices. Asian Paint, Maruti, Bharti Airtel, Hindustan Unilever and Bajaj Finance were the top gainers on the Sensex; on the flip side, Axis Bank, HDFC Bank, Reliance, ICICI Bank 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
ASIANPAINT	2,958.00	2,867.60	3.15
DRREDDY	1,276.50	1,260.10	1.30
MARUTI	16,245.00	16,097.00	0.92
BHARTIARTL	2,107.80	2,089.70	0.87
SBILIFE	1,985.00	1,971.60	0.68

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
INDIGO	5,700.00	5,794.00	-1.62
ICICIBANK	1,373.80	1,390.10	-1.17
RELIANCE	1,548.30	1,566.10	-1.14
HDFCBANK	991.40	1,002.10	-1.07
AXISBANK	1,262.30	1,275.70	-1.05

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,73,16,662	991.40	2,705.01
RELIANCE	1,13,89,150	1,548.30	1,766.02
ICICIBANK	1,21,26,396	1,373.80	1,666.98
BHARTIARTL	65,91,396	2,107.80	1,386.05
SBIN	1,34,44,314	969.90	1,308.43

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,73,16,662	991.40	2,705
ETERNAL	2,35,17,461	300.60	704.49
TATASTEEL	1,53,55,023	167.89	257.64
SBIN	1,34,44,314	969.90	1,308.4
ICICIBANK	1,21,26,396	1,373.80	1,666.9



Indian equity benchmarks ended near day's low points on Tuesday ahead of the Reserve Bank of India's Monetary Policy Committee meeting, weighed down further by selling from Foreign Institutional Investors (FIIs). Markets made a negative start, and extended losses throughout the session, due to profit-booking across most sectors. Sentiments remained subdued as India's industrial output growth, measured in terms of the Index of Industrial Production (IIP), grew 0.4 per cent (Year-on-Year) in October 2025. Traders were also cautious as Gross Goods and Services Tax (GST) collection rose at a slower pace of 0.7% in November 2025 at Rs 1.70 lakh crore, as domestic revenues declined. Gross Goods and Services Tax collection was over Rs 1.69 lakh crore in November 2024. Sentiments remained downbeat as Foreign Institutional Investors (FIIs) offloaded equities worth Rs 1,171.31 crore on Monday, according to exchange data.

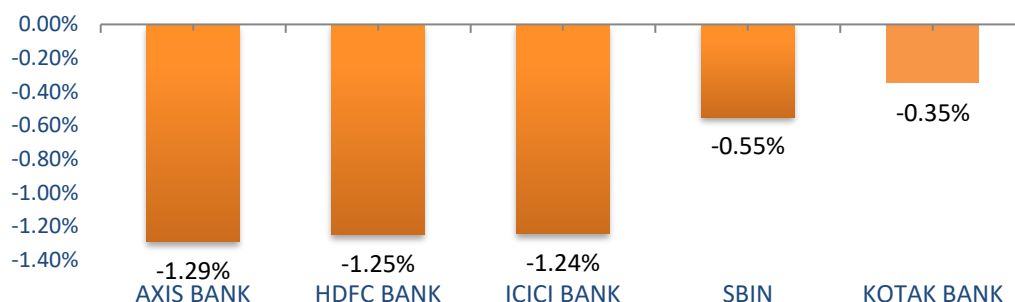
On European markets were trading in green ahead of the euro zone's flash inflation data for November and unemployment figures. Asian markets ended mostly in green after U.S. Commerce Secretary Howard Lutnick confirmed that the general tariff rate on imports from South Korea, including on autos, would drop to 15 percent.

Source: Ace Equity

NEWS BULLETIN

- **Mazda** has received order worth Rs 24.50 crore (excluding tax) for manufacture and supply of Condensers from a leading EPC consultant in Mumbai. The order is to be executed within 11 months from the date of approval of technical drawings and documents.
- **ITCONS E-Solutions** has secured new contract worth around Rs 30.60 lakh (inclusive of all taxes and duties) from Centre for Development of Telematics, Ministry of Communications, Bangalore, for deployment of 10 resources.
- **Insolation Energy's wholly owned subsidiary - Insolation Green Energy** has secured sale orders amounting to Rs 516.05 crore (inclusive of GST). Insolation Green Energy has secured a purchase order aggregating to Rs 357 crore (including GST) for the supply of Solar PV Module N Type Topcon by a well-renowned IPP Company.

MARKET DRIVING SECTOR : BANK



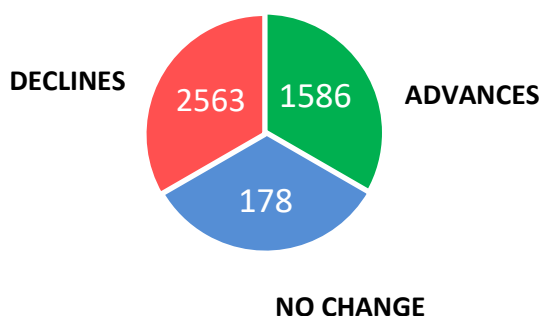
S&P BSE: BANK

CLOSING: 66,369.05

CHANGE: - 498.56

CHANGE: - 0.75%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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