



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,559.65	84,518.33	84,780.19	84,238.43	84,481.81	-77.84	-0.09
NIFTY	25,818.55	25,764.70	25,902.35	25,726.30	25,815.55	-03.00	-0.01

INDICES CLOSED ON A FLAT NOTE

The 30-share BSE Sensex was down by 77.84 points or 0.09% to settle at 84,481.81 and the Nifty was down by 03.00 points or 0.01% to settle at 25,815.55. The BSE Mid-Cap was up by 0.05% and BSE Small Cap was down by 0.28%. On the sectoral front, IT, Metal, Oil & Gas, Banks, Consumer Durables were gaining index. On the flip side, Realty, FMCG, Capital Goods, Healthcare and Auto were losing indices. TCS, Tech Mahindra, Infosys, Axis Bank and HCL Tech were the top gainers on the Sensex; on the flip side, Sunpharma, Tata Steel, Powergrid, Asian Paint and NTPC were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
INDIGO	5,125.00	4,980.50	2.9
TCS	3,281.20	3,217.80	1.97
MAXHEALTH	1,048.00	1,031.10	1.64
TECHM	1,605.00	1,579.40	1.62
INFY	1,627.10	1,602.00	1.57

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
SUNPHARMA	1,746.00	1,792.90	-2.62
TATASTEEL	167.95	170.34	-1.40
POWERGRID	257.90	261.10	-1.23
ASIANPAINT	2,758.40	2,785.70	-0.98
TATACONSUM	1,169.00	1,179.80	-0.92

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
INDIGO	42,60,878	5,125.00	2,158.23
HDFCBANK	1,49,12,404	980.00	1,463.61
SHRIRAMFIN	1,24,81,527	866.00	1,086.98
INFY	65,77,278	1,627.10	1,067.93
RELIANCE	65,80,644	1,543.50	1,016.90

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TMPV	1,54,17,489	346.25	528.25
HDFCBANK	1,49,12,404	980.00	1,463.6
ETERNAL	1,41,59,699	285.00	402.18
TATASTEEL	1,31,52,372	167.95	222.33
SHRIRAMFIN	1,24,81,527	866.00	1,086.9



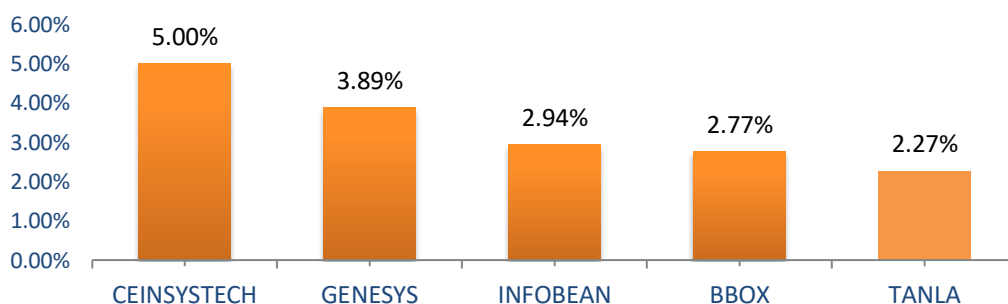
Indian equity benchmarks ended flat with negative bias on Sensex weekly expiry day of derivative contracts. After making a week start, soon indices turned positive, as traders took some support amid renewed foreign investor buying and CareEdge Ratings' latest report estimating India's Gross Domestic Product (GDP) growth at 7.5% in FY26 and 7.0% in FY27. However, in the final leg of trade, markets erased intra-day gains and settled just below the neutral lines. Traders took note of CareEdge Ratings' latest report estimating India's Gross Domestic Product (GDP) growth at 7.5% in FY26 and 7.0% in FY27. Besides, nominal GDP growth is projected at 8.3%, lower than the budgeted 10.1% for FY26. Traders paid no heed towards Think tank GTRI's statement that the free trade pact between India and Oman, slated to be signed on December 18, will provide greater market access to domestic products such as petroleum, machinery, rice, iron and steel articles.

On Global market: European markets were trading in green, ahead of interest rate decisions from the European Central Bank and the Bank of England. Asian markets ended mostly in red ahead to the Bank of Japan's policy meeting conclusion on Friday, with the central bank expected to raise interest rates to the highest level in three decades. Source: Ace Equity

NEWS BULLETIN

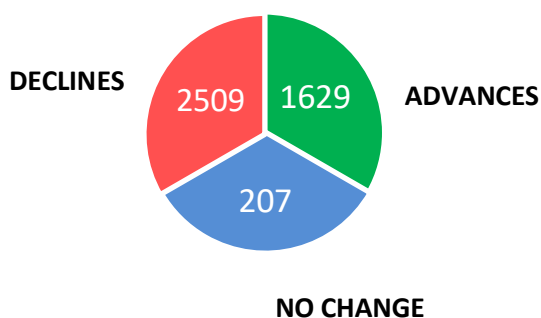
- **CFF Fluid Control** has received the Contract for Procurement of various Equipment for P75 Project from Material Organisation (Indian Navy). Value of order is approximately Rs 5.31 crore (Including Tax). The said order is expected to be completed by December 2026.
- **Artefact Projects** has received letter of Award (LoA) from National Highways Authority of India (NHAI) for Consultancy services for independent engineer services during operation. Broad commercial consideration or size of the order is Rs 7.67 crore (excluding GST), and the project is to be executed over a period of 60 months.

MARKET DRIVING SECTOR : IT

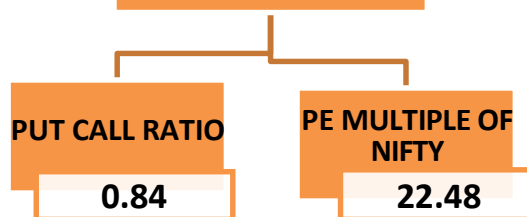


S&P BSE: IT
CLOSING: 37,263.85
CHANGE: + 404.21
CHANGE: + 1.10%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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