

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	85,567.48	85,690.10	85,704.93	85,342.99	85,524.84	- 42.64	-0.05
NIFTY	26,172.40	26,205.20	26,233.55	26,119.05	26,177.15	+ 04.75	+0.02

INDICES CLOSED ON A FLAT NOTE

The 30-share BSE Sensex was down by 42.64 points or 0.05% to settle at 85,524.84 and the Nifty was up by 4.75 points or 0.02% to settle at 26,177.15. The BSE Mid-Cap was up by 0.07% and BSE Small Cap was up by 0.38%. On the sectoral front, Metal, Oil & Gas, FMCG, Capital Goods, Auto and were gaining indices. On the flip side, Healthcare, IT, Banks Consumer Durables and Realty were losing indices. ITC, Ultratech Cement, TMPV, Tata Steel and HDFC Bank were the top gainers on the Sensex; on the flip side, Infosys, Bharti Airtel, Adani Ports, Sunpharma and Tech Mahindra 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
COALINDIA	400.65	386.25	3.73
SHRIRAMFIN	957.50	934.85	2.42
ITC	408.85	402.70	1.53
ULTRACEMCO	11,682.00	11,532.00	1.30
TMPV	362.60	359.15	0.96

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INFY	1,664.60	1,689.60	-1.48
BHARTIARTL	2,123.00	2,147.60	-1.15
ADANI PORTS	1,492.80	1,508.70	-1.05
SUNPHARMA	1,753.40	1,769.80	-0.93
TECHM	1,631.50	1,646.70	-0.92

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,79,27,843	997.00	1,783.48
SHRIRAMFIN	1,46,32,455	957.50	1,388.52
ICICIBANK	91,05,416	1,362.40	1,239.98
RELIANCE	75,06,528	1,569.00	1,180.78
INFY	65,92,875	1,664.60	1,098.60

Most Active (by volume)

Name	Qty	Pr.	Value CR
COALINDIA	1,84,87,393	400.65	736.13
HDFCBANK	1,79,27,843	997.00	1,783.4
TATASTEEL	1,73,48,051	170.82	295.84
SHRIRAMFIN	1,46,32,455	957.50	1,388.5
ETERNAL	1,27,62,620	284.25	364.32



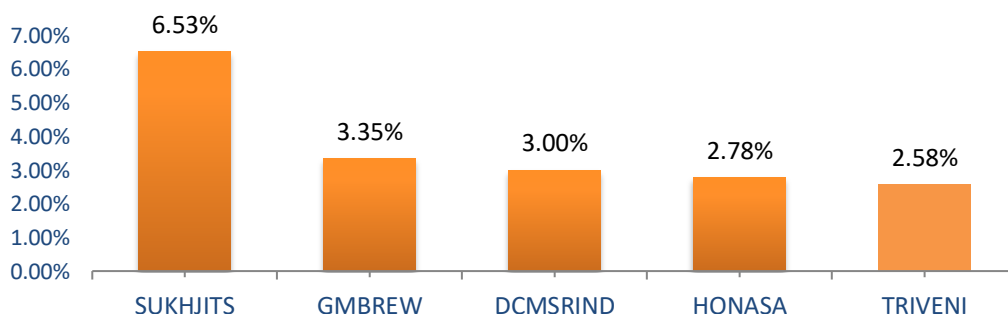
Indian equity benchmarks ended flat on Tuesday, pressured by selling in IT stocks and foreign institutional investors turning net sellers. Despite making a positive start, soon indices turned negative, as traders were cautious after the government data showed that India's eight key infrastructure sectors grew at a slower pace of 1.8 per cent in November. In afternoon session, markets hovered near flat lines and remained range-bound throughout the session. Some concerns came as the Ministry of Commerce & Industry's data showed that the output of eight key infrastructure sectors grew at a slower pace of 1.8 per cent in November 2025 as compared to 5.8 per cent in the same month last year, amid a dip in production of crude oil, natural gas, refinery products, and electricity. Traders took note of Commerce and Industry Minister Piyush Goyal's statement that India is at an advanced stage of negotiations for a bilateral trade agreement with the US. Traders remained cautious as exchange data showed FIIs returned to selling mode, offloading Rs 457 crore worth of Indian equities on Monday.

On Global market European markets were trading mostly in green, amid hopes of further interest rate cuts by Federal Reserve in 2026 and renewed optimism about technology stocks. Asian markets ended mostly in green tracking Wall Street's gains on Monday.
Source: Ace Equity

NEWS BULLETIN

- **Shakti Pumps (India)** has secured order worth around Rs 356.77 crore (inclusive of GST) from Maharashtra State Electricity Distribution Company. The order is for design, manufacture, supply, transport, installation, testing and commissioning of 12,883 Off-Grid DC Solar Photovoltaic Water Pumping Systems (SPWPS).
- **Aurionpro Solutions' subsidiary -- Integro Technologies** has bagged order from a reputed global bank headquartered in Singapore. The order value of approximately Rs 63 crore is one of the largest engagements in Asia in 2025 among lending product vendors. The engagement reflects strong customer confidence in Aurionpro's differentiated, future-ready lending products and reinforces its position as a trusted long-term technology partner to leading global banks.

MARKET DRIVING SECTOR : FMCG



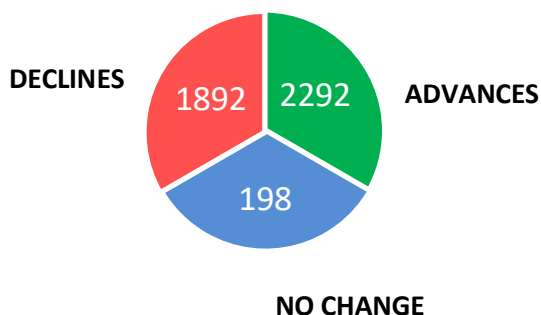
S&P BSE: FMCG

CLOSING: 20,310.38

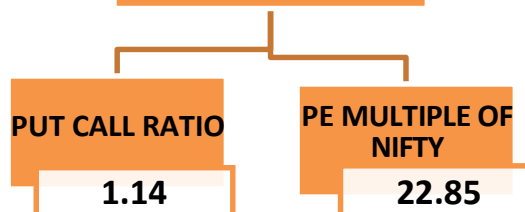
CHANGE: +96.99

CHANGE: + 0.48%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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