

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,695.54	84,600.99	84,806.99	84,470.94	84,675.08	- 20.46	-0.02
NIFTY	25,942.10	25,940.90	25,976.75	25,878.00	25,938.85	- 03.25	-0.01

CHOPPY SESSION END ON A FLAT NOTE

The 30-share BSE Sensex was down by 20.46 points or 0.02% to settle at 84,675.08 and the Nifty was down by 03.25 points or 0.01% to settle at 25,938.85. The BSE Mid-Cap was down by 0.05% and BSE Small Cap was down by 0.20%. On the sectoral front, Auto, Banks and Metal were gaining indices. On the flip side, FMCG, Consumer Durables, Realty, Oil & Gas, Capital Goods, Healthcare, and IT were losing indices. Tata Steel, Mahindra & Mahindra, Bajaj Finserv, Axis Bank and SBIN were the top gainers on the Sensex; on the flip side, Eternal, Infosys, Asian Paint, Ultratech Cement and Bajaj Finance 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
BAJAJ-AUTO	9,298.00	9,087.00	2.32
HINDALCO	883.30	865.00	2.12
SHRIRAMFIN	974.55	955.50	1.99
TATASTEEL	175.68	172.30	1.96
M&M	3,660.00	3,592.10	1.89

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	276.60	282.85	-2.21
EICHERMOT	7,132.50	7,272.00	-1.92
TATACONSUM	1,173.80	1,195.20	-1.79
MAXHEALTH	1,046.60	1,064.10	-1.64
INDIGO	5,008.00	5,085.50	-1.52

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	3,31,55,840	995.00	3,279.61
ICICIBANK	1,86,21,277	1,347.00	2,498.85
MARUTI	10,55,843	16,625.0	1,758.91
SHRIRAMFIN	1,77,57,531	974.55	1,734.04
INFY	93,95,933	1,623.50	1,527.51

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ETERNAL	3,78,16,382	276.60	1,049.1
BEL	3,77,26,282	395.95	1,481.8
TATASTEEL	3,37,41,110	175.68	588.31
HDFCBANK	3,31,55,840	995.00	3,279.6
ICICIBANK	1,86,21,277	1,347.00	2,498.8



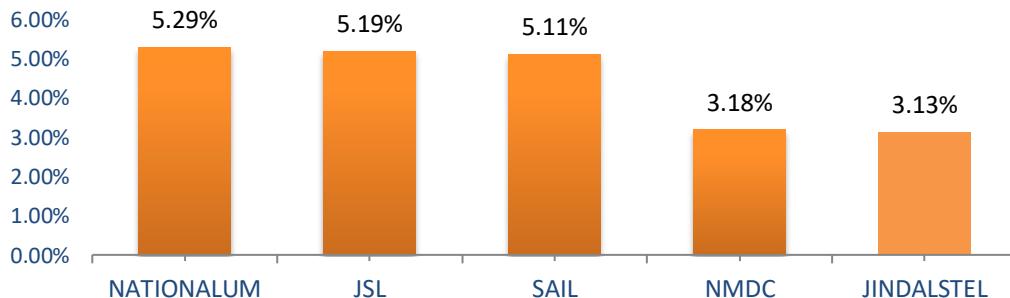
In choppy trading session, Indian equity benchmarks ended flat with negative bias on Tuesday. Traders avoided risky bids amid monthly F&O expiry. After making negative start, markets slipped below neutral lines amid persistent foreign fund outflows. In second half of the session, markets made some recovery but wavered between green and red terrain. Traders took note of report that India's industrial output growth, measured in terms of the Index of Industrial Production (IIP), jumped to two-year high of 6.7 per cent in November 2025 from 0.5 per cent in October 2025 and 5.0 per cent in November 2024. Commerce and Industry Minister Piyush Goyal has said that 100 per cent Australian product categories will be duty-free for Indian exports from January 1, 2026, unlocking fresh opportunities for labour-intensive sectors, under the Economic Cooperation and Trade Agreement (ECTA) between the both countries.

On Global market: European markets were trading higher as traders await the release of the FOMC minutes. Asian markets ended mixed amid concerns surrounding valuations of AI related stocks, and geopolitical tensions following China's military exercises around Taiwan. Source: Ace Equity

NEWS BULLETIN

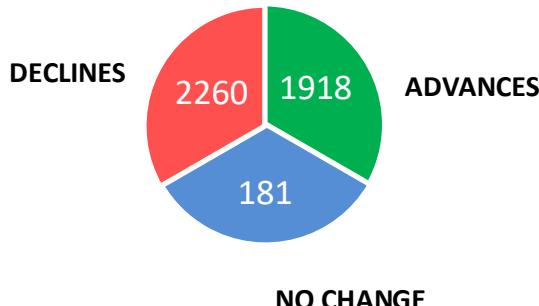
- B. L. Kashyap and Sons** has secured an order from ESNP Property Builders and Developer for Civil and Structural work for commercial project 'Embassy Splendid Tech Zone- Block' at Pallavaram, Chennai. Broad consideration or size of the order is Rs 364.07 crore. The said order is expected to be completed in around 24 months.
- Shakti Pumps (India)** has secured a work order worth Rs 21 crore from Jharkhand Renewable Energy Development Agency (state of Jharkhand). This is the third order secured by the company from the state of Jharkhand. The order is for design, manufacture, supply, transport, installation, testing and commissioning of 1,000 off Grid SPWPS at various locations across the state of Jharkhand under Component-B of PM-KUSUM scheme. The order is to be executed within 120 days from the date of NTP.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 36,263.47
CHANGE: + 693.13
CHANGE: + 1.95%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO

0.85

PE MULTIPLE OF NIFTY

22.57

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