

END DAY

COMMENTARY

31th DEC 2025



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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,675.08	84,793.58	85,437.17	84,705.57	85,220.60	+545.52	+0.64
NIFTY	25,938.85	25,971.05	26,187.95	25,969.00	26,129.60	+190.75	+0.74

INDICES CLOSED ON A STRONG NOTE

The 30-share BSE Sensex was up by 545.52 points or 0.64% to settle at 85,220.60 and the Nifty was up by 190.75 points or 0.74% to settle at 26,129.60. The BSE Mid-Cap was up by 1.01% and BSE Small Cap was up by 1.19%. On the sectoral front, Auto, FMCG, Consumer Durables, Realty, Oil & Gas, Capital Goods, Healthcare, Banks, Metal were gaining indices. On the flip side, IT were losing index. Tata Steel, Kotak Bank, Reliance, Axis Bank and Titan were the top gainers on the Sensex; on the flip side, TCS, Tech Mahindra, Infosys, Bajaj Finance and Sunpharma 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
JSWSTEEL	1,165.90	1,111.60	4.88
ONGC	240.46	234.68	2.46
TATASTEEL	179.93	175.80	2.35
KOTAKBANK	2,203.00	2,152.70	2.34
RELIANCE	1,569.00	1,539.80	1.90

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TCS	3,210.00	3,246.80	-1.13
TECHM	1,591.00	1,604.60	-0.85
GRASIM	2,833.00	2,841.70	-0.31
BAJFINANCE	986.50	989.30	-0.28
INFY	1,617.90	1,621.60	-0.23

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	1,09,63,228	992.90	990.9
TCS	33,62,576	3,210.00	3,246.80
INFY	65,38,656	1,617.90	1,621.60
BAJFINANCE	98,95,270	986.50	989.30
SHRIRAMFIN	97,95,994	996.80	979.40

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	5,08,97,078	179.93	916.61
ETERNAL	2,19,63,960	278.05	610.47
ONGC	1,15,14,698	240.46	275.56
HDFCBANK	1,09,63,228	992.90	1,088.2
TMPV	1,04,38,517	367.40	381.74



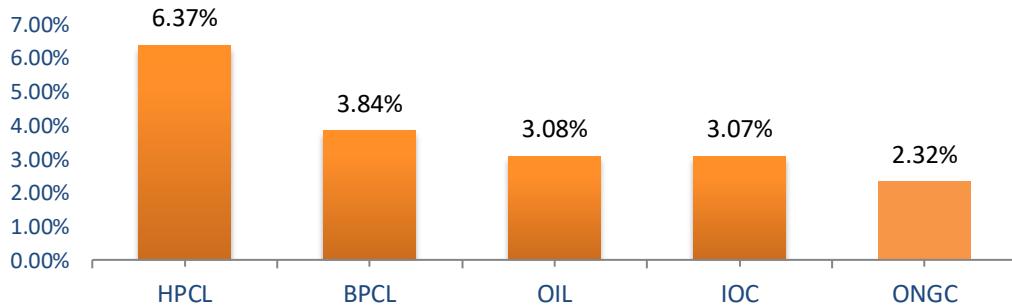
Indian equity benchmarks held their momentum till the end of the session and settled with gains of over half a percent on last day of calendar year 2025 as traders preferred to buy fundamentally strong stocks. Indices made positive start and extended their gains amid sustained buying by domestic institutional investors. In dying hour of trade, markets off their intraday high but managed to end higher with notable gains. Some support came as government launched Rs 4,531 crore market access support for exporters under which financial support will be provided to participate in activities such as international fairs and exhibitions. Investors took note of Reserve Bank of India's statement that it will conduct an auction of open market operations purchase of government securities worth Rs 50,000 crore on January 5, 2026, to inject liquidity in the system.

On Global market: European equity markets remained closed on account of New Year's Day. Asian markets ended mostly lower even though China's manufacturing activity rebounded in December as output returned to growth amid higher inflows of new work. The RatingDog headline factory Purchasing Managers' Index posted 50.1 in December, up from 49.9 in November. A score above 50.0 indicates expansion. Source: Ace Equity

NEWS BULLETIN

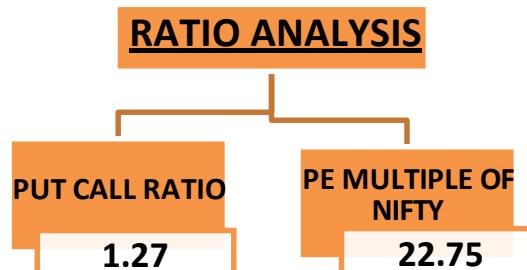
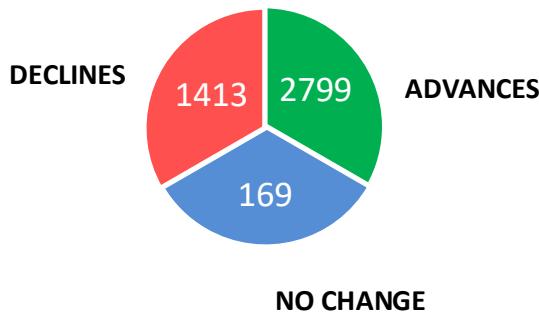
- **Praruh Technologies** has secured purchase order worth around Rs 3.23 crore from RailTel Corporation of India. The order is for procurement of Routers, Switches, SFP Modules, TP, Racks, and Other Equipment for Customer Delivery and Projects in the Western Region.
- **Mazda** has received an order of Rs 28.75 crore (excluding tax) for supply of Multi Effect Evaporator System and Agitated Thin Film Dryer from a leading Waste Management company. The said order is expected to be completed in 8 months from the date of approval of technical drawings and documents.
- **Shakti Pumps (India)** has secured a new work order worth around Rs 170.25 crore from Madhya Pradesh Urja Vikas Nigam. The order is for design, manufacture, supply, transport, installation, testing and commissioning of 4,840 Stand-alone Off-Grid DC Solar Photovoltaic Water Pumping Systems.

MARKET DRIVING SECTOR : OIL & GAS



S&P BSE: OIL & GAS
CLOSING: 28,708.83
CHANGE: + 763.51
CHANGE: + 2.73%

MARKET BREADTH – POSITIVE



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