

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	85,439.62	85,331.14	85,397.78	84,900.10	85,063.34	-376.28	-0.44
NIFTY	26,250.30	26,189.70	26,273.95	26,124.75	26,178.70	-71.60	-0.27

INDICES SHUT THE DAY IN NEGATIVE NOTE

The 30-share BSE Sensex was down by 376.28 points or 0.44% to settle at 85,063.34 and the Nifty was down by 71.60 points or 0.27% to settle at 26,178.70. The BSE Mid-Cap was down by 0.24% and BSE Small Cap was down by 0.39%. On the sectoral front, Banks, Healthcare, IT, Auto, FMCG, Consumer Durables and Metal were gaining indices. On the flip side, Realty, Capital Goods, and Oil & Gas were losing indices. ICICI Bank, Hindustan Unilever, Sunpharma, SBIN and TCS were the top gainers on the Sensex; on the flip side, Trent, Reliance, ITC, Kotak Bank and Indigo 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
APOLLOHOSP	7,331.00	7,083.00	3.50
ICICIBANK	1,409.90	1,371.50	2.80
TATACONSUM	1,215.00	1,182.10	2.78
HDFCLIFE	776.05	759.30	2.21
BAJAJ-AUTO	9,668.00	9,497.50	1.80

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
TRENT	4,055.00	4,429.80	-8.46
RELIANCE	1,508.90	1,578.10	-4.39
KOTAKBANK	2,142.30	2,190.90	-2.22
INDIGO	5,002.50	5,102.50	-1.96
ITC	343.25	349.70	-1.84

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
RELIANCE	2,74,17,125	1,508.90	4,156.90
HDFCBANK	3,19,88,783	962.95	3,078.73
TRENT	61,44,187	4,055.00	2,508.47
ITC	7,25,82,738	343.25	2,486.18
ICICIBANK	1,72,60,416	1,409.90	2,423.62

Most Active (by volume)			
Name	Qty	Pr.	Value CR
ITC	7,25,82,738	343.25	2,486.1
HDFCBANK	3,19,88,783	962.95	3,078.7
ETERNAL	2,95,77,754	279.00	825.49
TATASTEEL	2,85,14,282	186.32	531.73
RELIANCE	2,74,17,125	1,508.90	4,156.9



Indian equity benchmarks extended their losing streak on Tuesday amid worries over fresh warning from the US to further raise tariffs against India. Markets made negative start and continued to trade lower amid foreign institutional investors (FII) outflows. In second half of the session, indices added losses but soon managed to off their day's lows and ended in red. Traders were cautious ahead of Q3FY26 earnings season. Some concerns came as apex exporters' body Federation of Indian Export Organisations (FIEO) stated that beyond the existing 50 percent tariff, a further hike by the US, will badly hit Indian exports, particularly in traditional sectors of exports. Traders took note of report that India's services sector growth moderated in December, as the rates of expansion in incoming new work and output eased to the slowest in 11 months, and companies refrained from recruiting additional staff. The seasonally adjusted HSBC India Services PMI Business Activity Index fell from 59.8 in November to 58.0 in December, indicating the slowest rate of expansion since January.

On Global market: European markets were trading mostly in green ahead of Germany's flash December CPI and HICP numbers. All Asian equity markets ended higher despite latest geopolitical developments involving the US and Venezuela as well as the ongoing Russia-Ukraine war.
Source: Ace Equity

NEWS BULLETIN

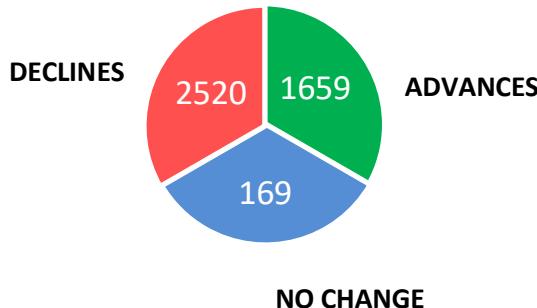
- **Faalcon Concepts** has received work order worth Rs 18.41 crore from Splendor Information Technology for the design, fabrication, built & installation of aluminium glazing facade glass. The order is to be executed within 15 months.
- **Desco Infratech** has received three orders totalling around Rs 5.37 crore (inclusive of GST). The first order is from Adani Total Gas for PE PNG works at Faridabad, Palwal. Another order from Bharat Petroleum Corporation for the operations & maintenance services for PNG Network of BPCL GA in Hanumangarh, Rajasthan.
- **DCX Systems** has secured purchase order worth Rs 11.33 crore from Rafael Advanced Defence Systems, Israel to manufacture and supply of Cable and Wire Harness Assemblies.

MARKET DRIVING SECTOR : OIL & GAS



S&P BSE: OIL & GAS
CLOSING: 28,221.65
CHANGE: - 347.30
CHANGE: - 1.22%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.92

PE MULTIPLE OF NIFTY
22.78

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