

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	85,063.34	84,961.14	84,961.14	84,961.14	84,961.14	-102.20	-0.12
NIFTY	26,178.70	26,143.10	26,187.15	26,067.90	26,140.75	-37.95	-0.14

INDICES CLOSED WITH TINY LOSS

The 30-share BSE Sensex was down by 102.20 points or 0.14% to settle at 84,961.14 and the Nifty was down by 37.95 points or 0.14% to settle at 26,140.75. The BSE Mid-Cap was up by 0.47% and BSE Small Cap was up by 0.12%. On the sectoral front, Healthcare, IT, Capital Goods, Consumer Durables and Metal were gaining indices. On the flip side, FMCG, Auto, Banks, Realty and Oil & Gas were losing indices. Titan, HCL Tech, Tech Mahindra, Infosys and Sunpharma were the top gainers on the Sensex; on the flip side, Maruti, Powergrid, TMPV, HDFC Bank and Asian Paint 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TITAN	4,273.90	4,111.80	3.94
HCLTECH	1,654.50	1,616.30	2.36
WIPRO	270.35	265.60	1.79
TECHM	1,630.00	1,601.80	1.76
JIOFIN	303.70	298.55	1.73

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
CIPLA	1,465.30	1,530.80	-4.28
MARUTI	16,806.00	17,292.00	-2.81
POWERGRID	264.25	268.55	-1.60
TMPV	363.00	368.90	-1.60
MAXHEALTH	1,034.90	1,051.60	-1.59

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HFDCBANK	5,28,84,712	950.25	5,024.52
ICICIBANK	1,58,13,795	1,425.60	2,248.69
RELIANCE	1,11,99,340	1,505.10	1,687.52
TITAN	34,96,331	4,273.90	1,494.76
ETERNAL	3,81,84,297	280.50	1,073.97

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HFDCBANK	5,28,84,712	950.25	5,024.5
ETERNAL	3,81,84,297	280.50	1,073.9
ITC	2,94,40,378	341.75	1,006.1
JIOFIN	2,04,16,751	303.70	619.28
TATASTEEL	1,82,31,338	183.55	335.95



Indian equity benchmarks extended their losses for a third consecutive session on Wednesday, as profit booking continued at higher levels. Markets made a negative start and traded around the flat line amid rising geopolitical tensions between the US and Venezuela, as well as between China and Japan over escalating issues related to Taiwan. In the afternoon session, markets magnified losses and remained under pressure throughout the day, with most sectors witnessing broad-based selling. Traders took note of the External Affairs Minister S Jaishankar said that India views Luxembourg as a 'very important' partner, and the two countries can enhance bilateral cooperation in various fields, including fintech, space, and AI. Traders overlooked India Ratings & Research (Ind- Ra) in its latest report has said that India's Gross Domestic Product (GDP) is likely to grow by 6.9 per cent in the next financial year (FY27).

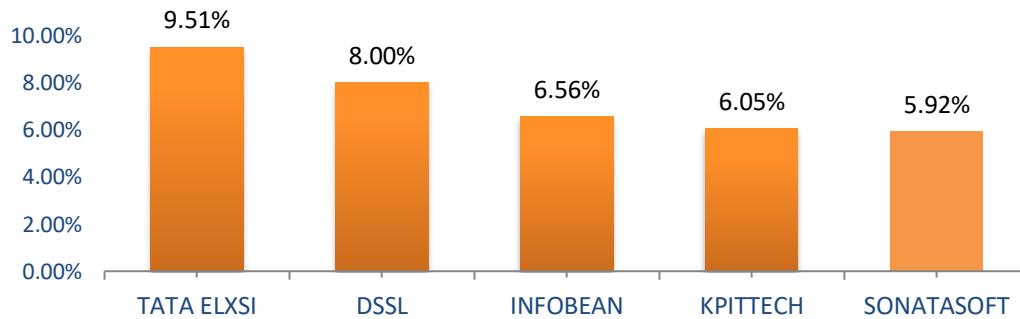
On Global market: European markets were trading mostly in red ahead of the release of flash inflation data from the euro area. Asian equity markets were trading mixed as tensions between China and Japan escalated, and weak U.S. data spurred hopes for more rate cuts.

Source: Ace Equity

NEWS BULLETIN

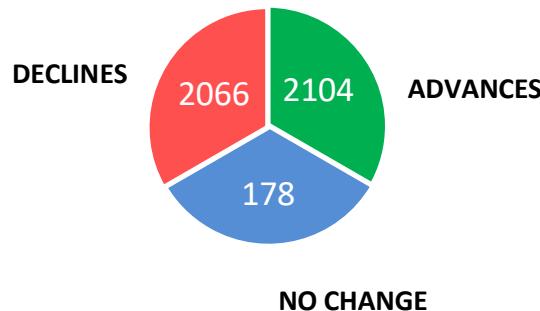
- **CMS Info Systems** has secured a contract worth Rs 1,000 crore from State Bank of India (SBI). This is the first such direct large PSU bank cash outsourcing contract, covering around 5,000 bank-owned ATMs across India.
- **Refex Industries** has secured an order worth Rs 43.74 crore from Large Business conglomerate for excavation, loading, transportation of pond ash to NHAI road projects. The order is to be executed within 4 months.
- **Arvi Encon** has secured work contract worth Rs 66.21 crore (Inclusive GST) from Bharat Petroleum Corporation (BPCL) for providing management, operation and maintenance services for Bina Dispatch Terminal (BDT) at BPCL Bina Refinery. The contract has term of 5 years, effective from January 14, 2026 until January 14, 2031.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 37,490.47
CHANGE: + 725.84
CHANGE: + 1.97%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO

0.89

PE MULTIPLE OF NIFTY

22.76

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