

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,961.14	84,778.02	84,965.27	84,110.10	84,180.96	-780.18	-0.92
NIFTY	26,140.75	26,106.50	26,133.20	25,858.45	25,876.85	-263.90	-1.01

INDICES CLOSED IN DEEP RED AMID GEOPOLITICAL TENSIONS

The 30-share BSE Sensex was down by 780.18 points or 0.92% to settle at 84,180.96 and the Nifty was down by 263.90 points or 1.01% to settle at 25,876.85. The BSE Mid-Cap was down by 1.99% and BSE Small Cap was down by 1.97%. On the sectoral front, there were no gaining index. On the flip side, Metal, Healthcare, IT, Capital Goods, Consumer Durables, FMCG, Auto, Banks, Realty and Oil & Gas were losing indices. Eternal, ICICI Bank, Bajaj Finance and BEL were the top gainers on the Sensex; on the flip side, Larsen & Toubro, Tech Mahindra, TCS, Reliance and Tata Steel 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 negative note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	283.15	280.95	0.78
SBILIFE	2,081.80	2,070.80	0.53
ICICIBANK	1,434.90	1,427.70	0.50
BAJFINANCE	970.10	968.80	0.13

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO	903.00	938.45	-3.78
JIOFIN	292.65	303.50	-3.57
WIPRO	261.90	270.80	-3.29
ONGC	231.20	239.06	-3.29
TECHM	1,575.90	1,625.20	-3.03

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
RELIANCE	1,65,18,684	1,470.70	2,441.00
ICICIBANK	1,48,61,699	1,434.90	2,134.04
HDFCBANK	2,19,28,849	948.00	2,077.96
TCS	41,59,336	3,196.00	1,335.76
ITC	3,67,06,319	340.50	1,252.16

Most Active (by volume)			
Name	Qty	Pr.	Value CR
TATASTEEL	3,84,54,951	179.90	697.61
ETERNAL	3,81,91,591	283.15	1,084.2
ITC	3,67,06,319	340.50	1,252.1
BEL	2,22,38,704	415.65	930.65
HDFCBANK	2,19,28,849	948.00	2,077.9



Indian equity benchmarks declined for the fourth consecutive session on Thursday, weighed down by broad-based selling, with IT stocks leading the losers. Markets made a negative start amid escalating geopolitical tensions and uncertainty surrounding U.S. tariffs. Selling intensified in the second half of the session, dragging indices to close near their day's low points. Traders ignored External Affairs Minister S Jaishankar's statement that India is strengthening its relationship with Europe and both sides can bring greater stability to the international economy and global politics. Stocks of oil marketing companies (OMCs) traded under pressure amid reports that US President approved a bill that threatens to raise tariffs on countries buying energy products from Russia to at least 500 per cent. Traders remained cautious as exchange data showed foreign institutional investors (FIIs) offloaded equities worth Rs 1,527.71 crore on Wednesday.

On Global market: European markets were trading mostly in red as investors monitored the latest U.S.-Venezuela developments and awaited upcoming U.S. labor market data for additional clues on the Federal Reserve's trajectory. Asian equity markets were trading mostly in red amid escalating China-Japan tensions.

Source: Ace Equity

NEWS BULLETIN

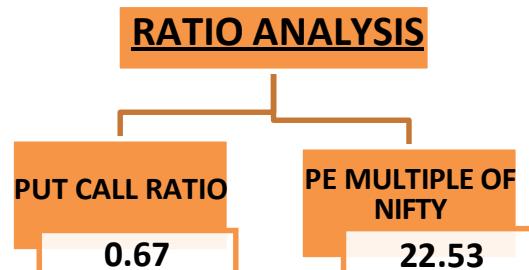
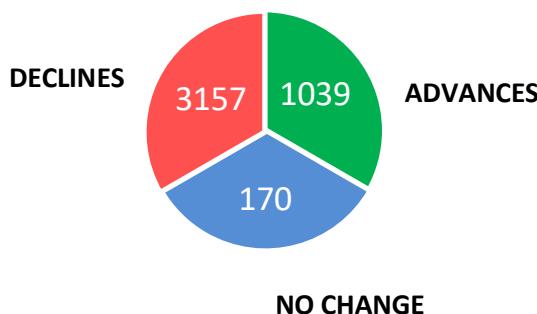
- **NCL Industries** has reported 5% growth in cement production at 6,94,854 MT for the quarter ended December 31, 2025 (Q3FY26) as compared to 6,61,049 MT in the same quarter last year (Q3FY25). Further, its cement dispatches grew 5% to 6,93,229 MT during Q3FY26 against 6,62,936 MT in Q3FY25.
- **Angel One** has reported 21% growth in client base to 35.71 million in December 2025 as against 29.52 million recorded in December 2024. The company's client base rose by 1.8% Month-on-Month (MoM) from 35.08 million clients in November 2025.
- **PTC Industries** has received a prestigious order from the Vikram Sarabhai Space Centre (VSSC), a key centre of the Indian Space Research Organisation (ISRO). The order involves the conversion of 40 tonnes of Grade 1 Titanium sponge into Ti-6Al-4V Titanium alloy ingots.

MARKET DRIVING SECTOR : METAL



S&P BSE: METAL
CLOSING: 36,724.16
CHANGE: - 1270.88
CHANGE: - 3.34%

MARKET BREADTH – NEGATIVE



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