



| Index | Previous Close | Open | High | Low | Close | Change | Change% |
|--------|----------------|-----------|-----------|-----------|-----------|---------|---------|
| SENSEX | 83,570.35 | 83,494.49 | 83,539.93 | 82,898.31 | 83,246.18 | -324.17 | - 0.39 |
| NIFTY | 25,694.35 | 25,653.10 | 25,653.30 | 25,494.35 | 25,585.50 | -108.85 | - 0.42 |

INDICES SHUT THE DAY IN RED NOTE

The 30-share BSE Sensex was down by 324.17 points or 0.39% to settle at 83,246.18 and the Nifty was down by 108.85 points or 0.42% to settle at 25,585.50. The BSE Mid-Cap was down by 0.43% and BSE Small Cap was down by 1.28%. On the sectoral front, FMCG, Auto and Capital Goods, were gaining indices. On the flip side, Realty, Consumer Durables, Healthcare, IT, Metal, Oil & Gas and Banks were losing indices. Indigo, Tech Mahindra, Hindustan Unilever, Bajaj Finance and Kotak Bank were the top gainers on the Sensex; on the flip side, Reliance, ICICI Bank, Eternal, Titan and Adani Ports 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 |
| INDIGO | 4,937.00 | 4,740.00 | 4.16 |
| TECHM | 1,710.40 | 1,670.50 | 2.39 |
| HINDUNILVR | 2,414.40 | 2,360.40 | 2.29 |
| KOTAKBANK | 427.50 | 418.20 | 2.22 |
| MARUTI | 16,182.00 | 15,859.00 | 2.04 |

| Top Losers | | | |
|------------|-------------|--------------|-------|
| Name | Closing Pr. | Previous Pr. | %Ch |
| WIPRO | 245.50 | 267.45 | -8.21 |
| RELIANCE | 1,413.20 | 1,457.90 | -3.07 |
| ETERNAL | 279.45 | 287.70 | -2.87 |
| TMPV | 343.55 | 353.60 | -2.84 |
| MAXHEALTH | 1,011.00 | 1,037.00 | -2.51 |

MARKET STATS (NSE)

| Most Active (by value) | | | |
|------------------------|-------------|----------|----------|
| Name | Qty | Pr. | Value CR |
| HDFCBANK | 3,81,91,942 | 925.95 | 3,542.57 |
| ICICIBANK | 2,33,02,883 | 1,377.70 | 3,202.33 |
| RELIANCE | 2,03,92,765 | 1,413.20 | 2,886.31 |
| ETERNAL | 8,36,64,844 | 279.45 | 2,359.26 |
| TECHM | 1,06,21,562 | 1,710.40 | 1,831.01 |

| Most Active (by volume) | | | |
|-------------------------|-------------|----------|----------|
| Name | Qty | Pr. | Value CR |
| ETERNAL | 8,36,64,844 | 279.45 | 2,359.2 |
| WIPRO | 6,58,33,247 | 245.50 | 1,627.2 |
| HDFCBANK | 3,81,91,942 | 925.95 | 3,542.5 |
| ICICIBANK | 2,33,02,883 | 1,377.70 | 3,202.3 |
| KOTAKBANK | 2,22,28,439 | 427.50 | 947.71 |



Indian equity benchmarks ended lower on Monday, dragged down by losses in heavyweight stocks, including ICICI Bank, Reliance Industries, and Wipro. Markets made a negative start and remained under selling pressure throughout the session, as traders were cautious amid concerns over escalating geopolitical tensions and tariff-related issues. Sentiments remained down beat as foreign portfolio investors (FPIs) withdrew over Rs 22,530 crore (\$2.5 billion) from Indian equities so far this month amid rising US bond yields and a stronger dollar, continuing their selling streak from last year. Traders remained cautious as Crisil Ratings' report warned that India's merchandise exports are likely to face strong headwinds due to uncertainty persists over India's trade negotiations with the United States (US) and concerns grow over further US tariffs on Russian crude oil purchases. Traders took note of the CII statement that its BCI climbed to a five-quarter high of 66.5 in Q3 FY26, driven by optimism around demand, profitability, and investment conditions.

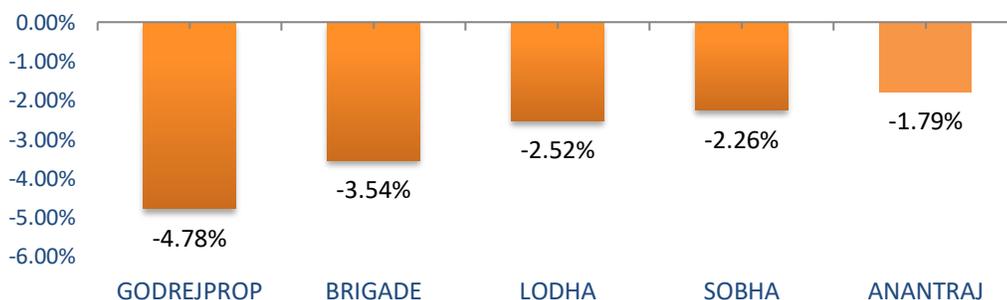
On Global market: European markets were trading in red amid lingering geopolitical tensions and ahead of the December consumer inflation data for the eurozone due later in the day. Asian equity markets ended mostly in green, despite Japan's industrial production decreased more than initially estimated in November.

Source: Ace Equity

NEWS BULLETIN

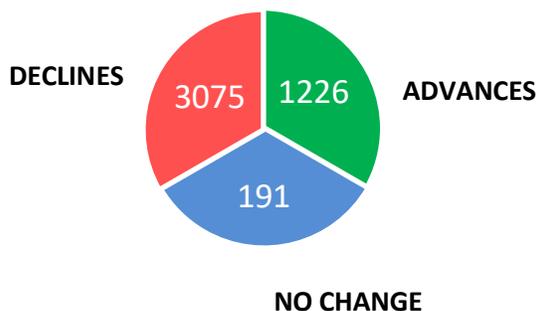
- **Hindustan Zinc** has reported 46.54% rise in its net profit at Rs 3,879.00 crore for third quarter ended December 31, 2025 as compared to Rs 2,647.00 crore for the same quarter in the previous year. The total income of the company increased by 27.79% at Rs 11,216.00 crore for Q3FY26 as compared to Rs 8,777.00 crore for the corresponding quarter previous year.
- **JD Cables** has received additional work order worth Rs 163 crore from Kaushal Engineering in continuation with the last order of Rs 244 crore received on December 23, 2025.
- **BHEL** has reported over three-fold jump in its net profit at Rs 382.49 crore for third quarter ended December 31, 2025 as compared to Rs 124.77 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : REALTY

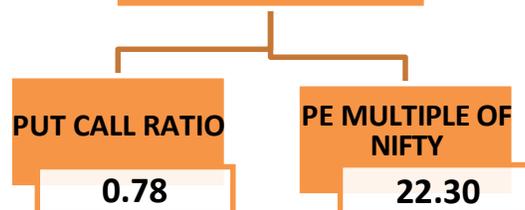


S&P BSE: REALTY
CLOSING: 6,518.92
CHANGE: - 129.26
CHANGE: - 1.94%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS



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