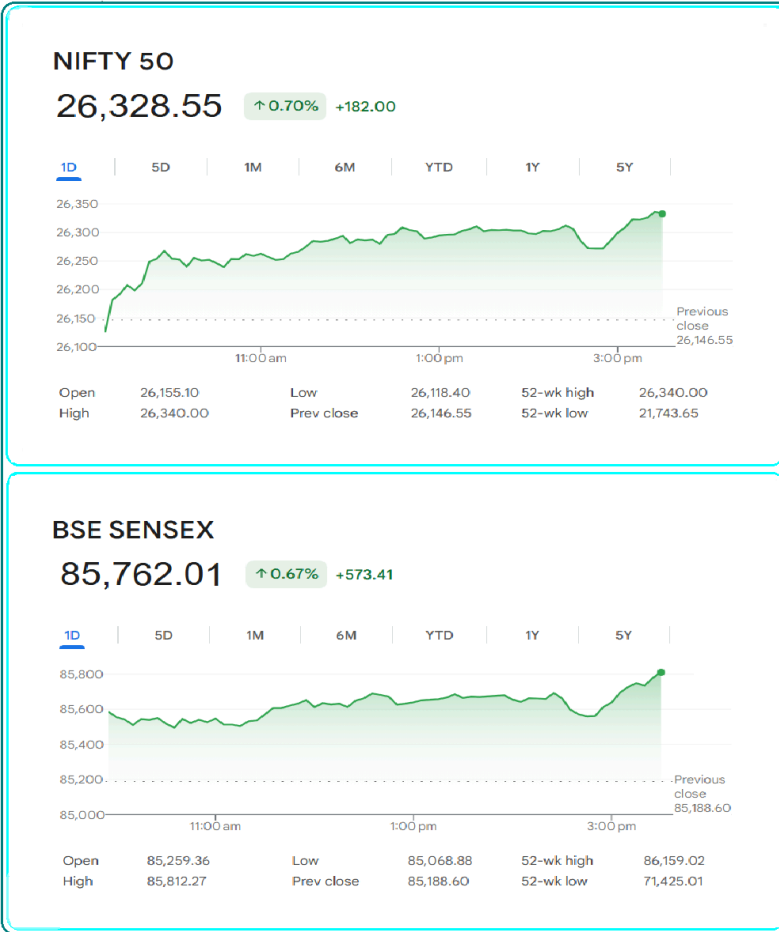


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	26328.55	26146.55	<b>0.70%</b>
<b>S&amp;P BSE SENSEX</b>	85762.01	85188.60	<b>0.67%</b>
<b>NIFTY MID100</b>	61365.90	60750.45	<b>1.01%</b>
<b>NIFTY SML100</b>	17832.05	17704.90	<b>0.72%</b>

(Source: [NSE](#), [BSE](#))

## Market Wrap Up

- The key equity benchmarks ended the session with solid gains, with the Nifty closing above the 26,300 mark after touching a record high in late trade. Market sentiment stayed upbeat throughout the day, supported by optimism over strong monthly auto sales data and continued buying interest across sectors. Attention is now shifting to the upcoming corporate earnings season, which is expected to guide market direction in the near term. The S&P BSE Sensex advanced 573.41 points or 0.67% to 85,762.01. The Nifty 50 index climbed 182 points or 0.70% to 26,328.55. The Nifty hit a fresh record high of 26,340, and the Bank Nifty climbed to an all-time high of 60,203.75 in late trade. The S&P BSE Mid-Cap index jumped 0.97% and the S&P BSE Small-Cap index gained 0.79%. Among the sectoral indices, the Realty index (up 1.52%), the Nifty Metal index (up 1.47%) and the Nifty Auto index (up 1.13%) outperformed the Nifty 50 index. Meanwhile, the Nifty FMCG index (down 1.19%), the Nifty IT index (up 0.39%) and the Nifty Private Bank index (up 0.40%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **January** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **1221** contracts at the end of the day.
- Long** position build up for the **January** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK, INFY**.
- Short** position build up for the **January** series has been witnessed in **BHARTIARTL, ITC**.
- Unwinding** position for the **January** series has been witnessed in **TATATECH, LTIM**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	60150.95	59711.55	0.74%
NIFTY AUTO	28803.65	28480.55	1.13%
NIFTY FMCG	53078.80	53718.50	-1.19%
NIFTY IT	38320.30	38171.50	0.39%
NIFTY METAL	11421.85	11256.00	1.47%
NIFTY PHARMA	22790.90	22632.75	0.70%
NIFTY REALTY	898.80	885.30	1.52%
BSE CG	67872.72	67259.78	0.91%
BSE CD	60481.93	59963.66	0.86%
BSE Oil & GAS	28910.20	28685.36	0.78%
BSE POWER	6725.89	6577.13	2.26%

(Source: [NSE](#), [BSE](#))

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	CLOSED	50339.48	-
HANG SENG	26338.47	25630.54	2.76%
STRAITS TIMES	4656.12	4646.21	0.21%
SHANGHAI	CLOSED	3968.84	-
KOSPI	4309.63	4214.17	2.27%
JAKARTA	8748.13	8646.94	1.17%
TAIWAN	29349.81	28963.60	1.33%
KLSE COMPOSITE	1669.76	1680.11	-0.62%
ALL ORDINARIES	9036.60	9018.80	0.20%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	102438.51	80232.39
NSE F&O	145037.11	93410.57

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	289.80
NET SELL	-

(Source: [NSE](#))

## Corporate News

- Larsen & Toubro** announced that its Minerals & Metals (M&M) business vertical has secured major orders from the Steel Authority of India (SAIL) and other customers, for EPC projects and products in the domestic metals sector. The contract value is in the range of Rs 5,000 crore to Rs 10,000 crore.
- Hero MotoCorp** reported a 40% increase in wholesales to 4,56,479 units in December 2025 compared to 3,24,906 units in the same month of 2024. Domestic sales were 4,19,243 units last month against 2,94,152 units in December 2024. Exports were at 37,236 units last month against 30,754 units in December 2024.
- Tata Motors Passenger Vehicles Ltd** reported a 14.1% growth in total sales to 50,519 units in December 2025 compared to 44,289 units in the same month of 2024. Domestic passenger vehicle sales were at 50,046 units last month against 44,230 units in December 2024, up 13.1%.
- Tata Motors (formerly TML Commercial Vehicles)** posted total sales commercial vehicle (CV) jumped 25% to 42,508 units in December 2025 compared with 33,875 units sold in December 2024. Sales of heavy commercial vehicle (HCV) trucks climbed 31% YoY to 12,483 units in December 2025, while intermediate, light and medium commercial vehicle (ILMCV) truck sales surged 40% YoY to 7,959 units. Total domestic CV sales increased 24% YoY to 40,057 units in December 2025.
- Bajaj Auto** reported 14% increase in total auto sales for December 2025, selling 3.69 lakh units as against 3.23 lakh units sold in December 2024. Domestic sales aggregated to 1.69 lakh units (up 4% YoY) and exports added up to 2 lakh units (up 25% YoY).
- TVS Motor Company** reported a 50% growth in sales at 4,81,389 units in December 2025 against 3,21,687 units in the same month of 2024. The total two-wheeler sales grew by 48% at 4,61,071 units last month compared to 3,12,002 units in December 2024. Domestic two-wheeler sales increased 54% to 3,30,362 units against 2,15,075 units in the year-ago month. Exports registered a growth of 40% at 1,46,022 units last month from 1,04,393 units in December 2024.

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
COALINDIA	427.90	400.45	6.85%
NTPC	352.10	336.30	4.70%
HINDALCO	925.70	894.95	3.44%
TRENT	4409.60	4297.40	2.61%
JIOFIN	301.70	295.70	2.03%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ITC	350.05	363.85	-3.79%
NESTLEIND	1279.70	1295.00	-1.18%
KOTAKBANK	2195.10	2217.80	-1.02%
SHRIRAMFIN	1010.35	1019.70	-0.92%
AXISBANK	1266.90	1274.40	-0.59%

(Source: [Moneycontrol](#))

- **Coal India** reported a 4.6% year-on-year (y-o-y) growth in production and a 5.2% fall in offtake in December. The miner, along with its eight subsidiaries, produced 75.7 million tonnes (MT) of coal in December 2025, higher than 72.4 MT in the same month in 2024.
- **Devyani International** and Sapphire Foods India are merging operations. This union will create India's largest quick-service restaurant entity. The combined company will operate over 3,000 stores. The merger is set to become effective from April 1.
- **Aurobindo Pharma's** subsidiary, Auro Pharma has acquired non-oncology prescription formulations business of Khandelwal Laboratories through business transfer agreement.

- **Maruti Suzuki India's** total production rose 34.43% to 211,939 units in December 2025 as against 157,654 units recorded in December 2024. Sequentially, the auto giant's total production rose 0.18% as compared with 211,555 units produced in November 2025. Passenger vehicle production stood at 208,591 units in December 2025, registering a 34.1% increase from 155,553 units produced in December 2024. Additionally, the production of light commercial vehicles reached 3,348 units in December 2025, up 59.35% year-on-year.
- **Indian Bank's** total deposits jumped 12.5% to Rs 7.90 lakh crore as of 31 December 2025, compared with Rs 7.02 lakh crore as of 31 December 2024. Gross advances increased 14.5% to Rs 6.40 lakh crore as of 31 December 2025 as against Rs 5.59 lakh crore as of 31 December 2024. The bank's total business grew 13.4% to Rs 14.30 lakh crore as of 31 December 2025 as against Rs 12.61 lakh crore as of 31 December 2024.
- **NTPC** has signed non-disclosure agreements with Russia's Rosatom and France's EDF to explore collaboration on deploying large, pressurised water reactor (PWR) projects in the country.
- **KPI Green Energy** said it has received approval to connect 32.40 megawatts of solar and hybrid power projects to the main electricity grid. The company said the projects were developed for clients of its subsidiary under its captive power producer business.
- **Olectra Greentech** announced the start of commercial operations at its greenfield EV manufacturing facility in Hyderabad. The company declared 31 December 2025 as the commercial operation date for the plant at Seetharampur, Telangana.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

## Global News

- U.K. S&P Global Manufacturing PMI rose to 50.6 in November from 50.2 in the previous month.
- Eurozone HCOB Manufacturing PMI fell to 48.8 in December 2025, below November's final reading of 49.6.
- Eurozone bank lending to households rose 2.9% year-on-year to EUR 7.094 trillion in November 2025. Lending to businesses also grew 3.1%, the most since June 2023. M3 money supply rose by 3% year-on-year to a fresh peak of EUR 17.2 trillion in November 2025, following a revised 2.9% increase in October.
- Germany's HCOB Manufacturing PMI fell to 47 in December 2025 from 48.2 in November.
- France's HCOB Manufacturing PMI rose to 50.7 in December 2025 from 47.8 in November.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

## Economic News

- Crude Oil traded at US\$ 57.41/bbl (IST 17:00).
- INR weakened to Rs. 90.20 from Rs. 89.97 against each US\$ resulting in daily change of 0.26%.
- India HSBC Manufacturing PMI fell to 55.0 in December 2025, revised lower from initial estimates of 55.7, down from 56.6 in November.
- India's goods and services tax (GST) collections reached Rs. 1.75 lakh crore (\$19.45 billion) in December, up 6.1% from the same month last year. GST collection was Rs 1,64,556 crore in December 2024.
- State-run banks led the increase, raising lending rates by 16 bps month-on-month to 8.05%, while rates at private banks remained unchanged at 9.44%. Foreign banks, meanwhile, lowered lending rates by 6 bps to 8.18% from 8.24% in October.
- Petrol, diesel and LPG sales in December exceeded their average growth rates for the year, with diesel demand rising sharply by 5% on-year. Petrol sales increased 6.7% in December, compared with a growth of 6.3% in the April-December period, according to provisional data from the oil ministry. Diesel consumption rose 5% in December, significantly higher than the 3% growth recorded during April-December. LPG consumption, largely used for cooking in India, climbed 12.7% in December, compared with 7.9% growth in the April-December period. Aviation turbine fuel (ATF) sales, however, declined 0.5% in December, against a growth of 1.4% during the same nine-month period.

(Source: [Economic Times](#), [Business Standard](#))

## Forthcoming Events

### Board Meetings as on 03/01/2026

Neueon Corporation Limited	Financial Results
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### Board Meetings as on 05/01/2026

Music Broadcast Limited	Dividend
Satin Creditcare Network Limited	Fund Raising
Torrent Pharmaceuticals Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 05/01/2026

Fairchem Organics Limited	Buy Back
Orient Technologies Limited	Bonus 1:10
Silgo Retail Limited	Rights 3:10 @ Premium Rs 50/-

(Source: NSE)

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