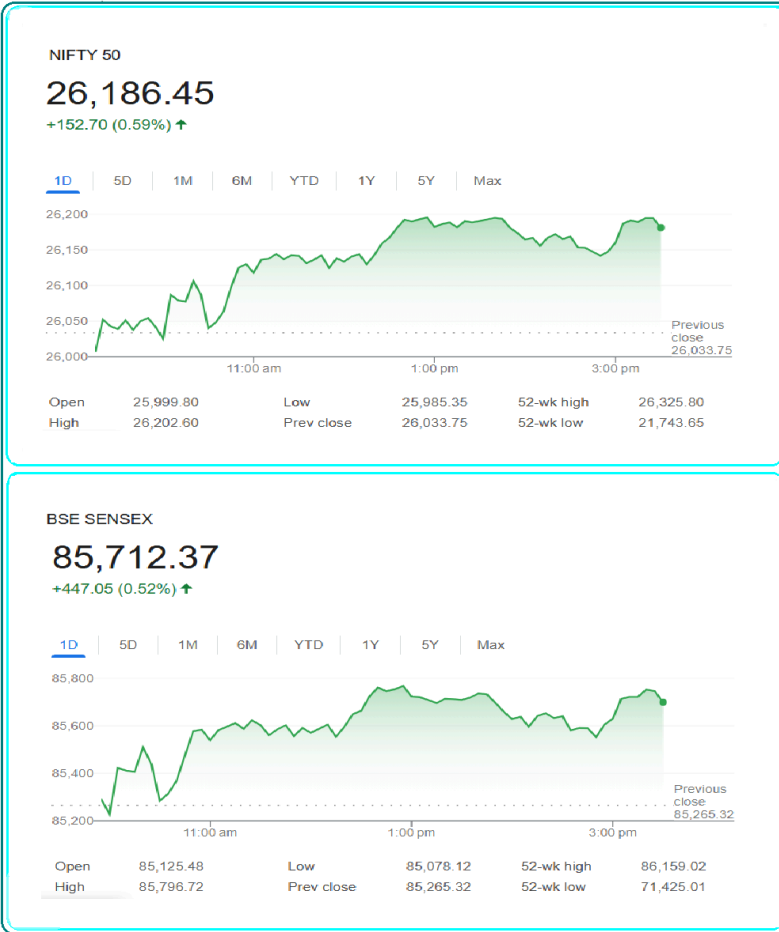


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	26186.45	26033.75	0.59%
S&P BSE SENSEX	85712.37	85265.32	0.52%
NIFTY MID100	60594.60	60299.80	0.49%
NIFTY SML100	17507.75	17607.85	-0.57%

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

Market Wrap Up

- The key equity indices ended with strong gains today, extending their winning run to a second straight session after the Reserve Bank of India (RBI) cut the repo rate by 25 basis points to 5.25%. The Nifty regained momentum and closed above the 26,150 mark after slipping to an intraday low of 25,985.35.
- The S&P BSE Sensex advanced 447.05 points or 0.52% to 85,712.37. The Nifty 50 index added 152.70 points or 0.59% to 26,186.45. In the past two trading sessions, the Nifty and Sensex declined 0.77% and 0.71%, respectively.
- The S&P BSE Mid-Cap index declined 0.19% and the S&P BSE Small-Cap index fell 0.32%.
- Among the sectoral indices, the Nifty PSU Bank index (up 1.51%), the Nifty Financial Services index (up 0.98%) and the Nifty Bank index (up 0.82%) outperformed the Nifty 50 index. Meanwhile, the Nifty Media index (down 0.48%), the Nifty Consumer Durables index (down 0.07%) and the Nifty Pharma index (down 0.05%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **December** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **2511** contracts at the end of the day.
- Long** position build up for the **December** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- Short** position build up for the **December** series has been witnessed in **TMPV**, **ETERNAL**, **VEDL**.
- Unwinding** position for the **December** series has been witnessed in **SBIN**, **BAJFINANCE**, **ITC**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	59777.20	59288.70	0.82%
NIFTY AUTO	27939.10	27732.70	0.74%
NIFTY FMCG	55202.85	55209.30	-0.01%
NIFTY IT	38703.65	38360.25	0.90%
NIFTY METAL	10340.35	10271.45	0.67%
NIFTY PHARMA	22947.15	22958.95	-0.05%
NIFTY REALTY	893.15	890.10	0.34%
BSE CG	67647.37	67933.24	-0.42%
BSE CD	60828.52	60812.41	0.03%
BSE Oil & GAS	27947.46	27902.70	0.16%
BSE POWER	6501.06	6485.21	0.24%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	50491.87	51028.42	-1.05%
HANG SENG	26085.08	25935.90	0.58%
STRAITS TIMES	4531.36	4535.14	-0.08%
SHANGHAI	3902.81	3875.79	0.70%
KOSPI	4100.05	4028.51	1.78%
JAKARTA	8632.76	8640.20	-0.09%
TAIWAN	27980.89	27795.71	0.67%
KLSE COMPOSITE	1616.52	1621.07	-0.28%
ALL ORDINARIES	8926.10	8906.70	0.22%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	91780.56	88337.00
NSE F&O	162639.75	119709.47

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	438.90

(Source: [NSE](#))

Corporate News

- **HCL Technologies** and The University of Western Australia (UWA) have announced a collaboration to co develop globally accessible micro-credential programs in AI and cybersecurity, marking the first global micro-credential initiative under UWA's Enterprise Education ecosystem.
- Strategy (Nasdaq: MSTR), the world's independent (formerly publicly traded enterprise analytics company MicroStrategy), and **HCL Technologies** announced a strategic partnership to accelerate the global adoption and deployment of Strategy Mosaic, Strategy's AI-powered Universal Semantic Layer, for global enterprise clients.
- **Adani** and **Hindalco Industries** are looking to invest in Peru's copper sector. Peru, a major copper producer, is seeking new investments. India, a growing economy, wants to secure its copper supply chains. Discussions are underway for a free trade agreement between India and Peru. This pact could ensure a fixed quantity of copper concentrate for India.
- **Mahindra & Mahindra** announced a significant divestment. Its subsidiary, Mahindra Overseas Investment Company (Mauritius) Ltd, has sold a 3.58% stake in CIE Automotive S.A. This transaction brought in approximately 119 million euros. CIE Automotive S.A is an associate of the subsidiary.
- **Bharat Petroleum Corp** has ordered 2 million barrels each of Russian Urals and CPC Blend oil for January loading from non-sanctioned suppliers. The deals were secured at a discount of \$6-\$7 per barrel to dated Brent, with CPC Blend primarily sourced from Kazakhstan.
- **Suzlon Energy** is launching three new AI-powered smart blade factories. This expansion will boost its manufacturing capabilities across India. The new facilities aim to improve blade quality and production efficiency. Suzlon is also upgrading its existing plants. This strategic move supports its large order book and strengthens its position in India's growing wind energy sector.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	854.90	828.15	3.23%
SBIN	971.50	948.10	2.47%
BAJAJFINSV	2096.50	2049.20	2.31%
ADANIENIT	2265.40	2217.90	2.14%
BAJFINANCE	1048.00	1029.10	1.84%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	5370.50	5436.50	-1.21%
ETERNAL	292.40	295.75	-1.13%
TMPV	353.60	356.45	-0.80%
TRENT	4183.10	4215.80	-0.78%
SUNPHARMA	1805.30	1818.30	-0.71%

(Source: [Moneycontrol](#))

- **Diamond Power** has received a Letter of Intent (LoI) worth Rs. 747.64 Crore. The company has received the order from Adani Green Energy Limited. It underlines supply of power and solar cables to its Khavda and Rajasthan projects. The company will supply 2,126 km of 33KV high-voltage cables.
- **Lupin** announced that it has received tentative approval from the United States Food and Drug Administration (U.S. FDA) for its Abbreviated New Drug Application for Siponimod Tablets, 0.25 mg, 1 mg and 2 mg. This product would be manufactured at Lupin's Pithampur facility in India.
- **BEML** announced that it has secured an order worth Rs 157 crore from Loram Rail Maintenance India for the manufacturing of Switch Rail Grinding Machines.
- **Waaree Energies** announced that its wholly owned subsidiary, Waaree Solar Americas, has secured an order to supply 288 MW of solar modules to a prominent U.S.-based renewable energy developer.
- **Deepak Nitrite Ltd** said that its wholly-owned subsidiary, Deepak Chem Tech Ltd, has started manufacturing operations at its nitric acid plant. The plant is located in Nandesari, Vadodara district, Gujarat.
- **Zen Tech** has secured orders worth Rs. 120 Crore from India's Ministry of Defence. The contract underlines supply of a suite training simulators and equipment, bolstering its position in the military training systems segment.

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

Global News

- U.S. initial jobless claims slid to 191,000 in the week ended November 29th, a decrease of 27,000 from the previous week's revised level of 218,000. Continuing claims slipped by 4,000 to 1.939 million in the week ended November 22nd.
- U.S. factory orders rose by 0.2% in September after jumping by a downwardly revised 1.3% in August.
- Eurozone GDP growth for the third quarter of 2025 was revised slightly higher to 0.3%, above the previous quarter's 0.1% expansion. The economy grew 1.4% year-on-year in the third quarter of 2025, compared to second quarter.
- Germany's factory orders rose 1.5% month-on-month in October 2025, slowing from an upwardly revised 2.0% gain in the previous month.
- France's trade deficit narrowed sharply to EUR 3.9 billion in October 2025 from EUR 6.4 billion in September
- France's current account deficit narrowed to EUR 1.1 billion in October 2025 from EUR 1.6 billion in the previous month. .
- France's industrial production increased 0.2% month-on-month in October 2025, slowing from a downwardly revised a

0.7% gain in September. On a yearly basis, industrial output went up 1.1%.

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

Economic News

- Crude Oil traded at US\$ 59.32/bbl (IST 17:00).
- INR strengthened to Rs. 89.99 from Rs. 89.99 against each US\$ resulting in daily change of 0.00%.
- The Reserve Bank of India (RBI) lowered its key repo rate by 25 bps to 5.25% during its December 2025. Reverse Repo Rate remained unchanged at 3.35 percent in November. Cash Reserve Ratio (CRR) currently stands at 3.0%.
- India and Oman held their 14th Strategic Consultative Group meeting in Muscat. Discussions covered political, defense, security, trade, and cultural ties. Both nations reaffirmed their commitment to deepening bilateral cooperation. The next meeting will be held in New Delhi.

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

Forthcoming Events

Board Meetings as on 06/12/2025

Biocon Limited	Fund Raising
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Board Meetings as on 08/12/2025

Fujiyama Power Systems Limited	Financial Results
NACL Industries Limited	Fund Raising
One Point One Solutions Limited	Fund Raising
Physicswallah Limited	Financial Results

(Source: NSE)

Corporate Actions as on 08/12/2025

MODISON LIMITED	Interim Dividend - Rs 2.50 Per Share
Sikko Industries Limited	Bonus 1:1

(Source: NSE)

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