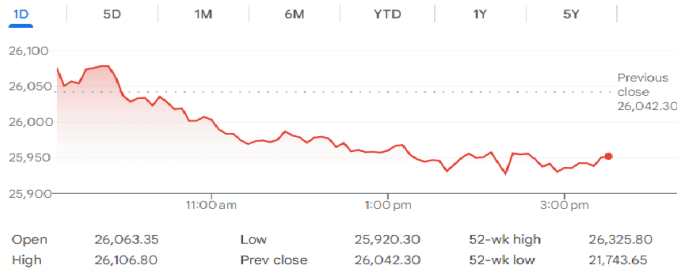


## Index Chart

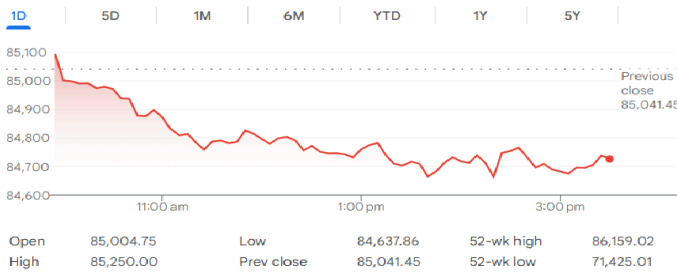
### NIFTY 50

25,942.10 ↓ 0.38% -100.20



### BSE SENSEX

84,695.54 ↓ 0.41% -345.91



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25942.10	26042.30	-0.38%
S&P BSE SENSEX	84695.54	85041.45	-0.41%
NIFTY MID100	60001.30	60314.45	-0.52%
NIFTY SML100	17567.70	17695.10	-0.72%

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

## Market Wrap Up

- The Key equity indices ended with modest cuts today amid persistent foreign institutional investor (FII) selling and a weakening rupee while investors remained cautious ahead of the upcoming corporate earnings season. The Nifty settled below the 25,950 mark after touching the day's high of 26,106.80 in early trade.
- The S&P BSE Sensex declined 345.91 points or 0.41% to 84,695.54. The Nifty 50 index lost 100.20 points or 0.38% to 25,942.10.
- The S&P BSE Mid-Cap index shed 0.45% and the S&P BSE Small-Cap index fell 0.58%.
- Among the sectoral indices, the Nifty Media index (up 0.93%), the Nifty FMCG index (up 0.11%) and the Nifty PSU Bank index (up 0.05%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (down 0.91%), the Nifty IT index (down 0.75%) and the Nifty Realty index (down 0.67%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **January** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **54980** contracts at the end of the day.
- **Long** position build up for the **January** series has been witnessed in **TMPV, ETERNAL, BHARATFORG**.
- **Short** position build up for the **January** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, HDFCBANK, INFY**.

(Source: Capitaline F&O)

## Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58932.35	59011.35	-0.13%
NIFTY AUTO	27592.50	27739.85	-0.53%
NIFTY FMCG	55192.45	55132.05	0.11%
NIFTY IT	38282.70	38572.30	-0.75%
NIFTY METAL	10789.10	10806.15	-0.16%
NIFTY PHARMA	22578.30	22684.65	-0.47%
NIFTY REALTY	877.20	883.15	-0.67%
BSE CG	66665.39	67141.56	-0.71%
BSE CD	59666.20	59932.90	-0.44%
BSE Oil & GAS	28017.78	27935.41	0.29%
BSE POWER	6431.87	6487.55	-0.86%

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

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	50526.92	50750.39	-0.44%
HANG SENG	25635.23	25818.93	-0.71%
STRAITS TIMES	4633.64	4636.15	-0.05%
SHANGHAI	3965.28	3963.68	0.04%
KOSPI	4220.56	4129.68	2.20%
JAKARTA	8644.26	8537.91	1.25%
TAIWAN	28810.89	28556.02	0.89%
KLSE COMPOSITE	1680.99	1677.10	0.23%
ALL ORDINARIES	9032.00	9069.00	-0.41%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	103927.90	81553.79
NSE F&O	358207.84	363293.35

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	2759.89

(Source: [NSE](#))

## Corporate News

- Larsen & Toubro** announced that its transportation infrastructure business vertical has secured a significant order for Hyderabad Greenfield Radial Road. As per L&T's internal classification, the contract falls under the 'significant' category, with an estimated value in the range of Rs 1,000 crore to Rs 2,500 crore.
- Coforge** said that it has signed definitive agreements to acquire Encora, an AI native firm born in the Silicon Valley with deep strengths across AI driven engineering underlaid by Cloud and Data.
- Vikran Engineering** has secured letter of awards (LoA) from M.P. Urja Vikas Nigam for the implementation of power plants with a total capacity of 45.75 MW AC in Vidisha, Madhya Pradesh.
- Jindal Steel** is set to double its structural steel manufacturing capacity at its Raigarh facility to 2.4 million tonnes per annum by mid-2028. This expansion will introduce a new mill and advanced technology, significantly boosting the availability of heavy and ultra-heavy structural steel sections in India to support infrastructure development.
- Bandhan Bank** has sold a Rs. 3,212 crore microfinance non-performing loan portfolio to ARCIL for Rs. 578 crore. This sale followed a Swiss Challenge process. The bank also initiated a process to sell an additional Rs. 3,720 crore in loans. These actions come as the bank's asset quality faced pressure from the microfinance segment.
- Adani Green Energy** announced that its wholly owned subsidiary, Adani Renewable Energy Holding Eleven (AREH11L), has incorporated a new wholly owned subsidiary named Ecothrive Renewables (ERL).
- NBCC (India)** announced that it will get a 21.23-acre land parcel in South Delhi as part of its settlement with the Delhi government. On this site, the business plans to develop a mixed-use real estate project. This shall have an estimated revenue of about Rs. 8,500 Crore.
- VA Tech Wabag** has secured a letter of award for a repeat 'large' order from the Saudi Water Authority. The order value as per the company's classification would be

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATASTEEL	172.30	169.12	1.88%
TATACONSUM	1195.20	1175.70	1.66%
ASIANPAINT	2775.40	2746.50	1.05%
GRASIM	2842.40	2817.70	0.88%
NESTLEIND	1280.00	1272.60	0.58%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANIPTS	1454.40	1487.10	-2.20%
POWERGRID	260.60	265.45	-1.83%
HCLTECH	1630.80	1660.90	-1.81%
TRENT	4226.00	4285.30	-1.38%
BEL	393.25	398.45	-1.31%

(Source: [Moneycontrol](#))

- **SEPC** announced that it has received a letter of acceptance (LoA) worth Rs 230 crore from MOIL, a Government of India undertaking.
- **Diamond Power Infrastructure** announced that it has secured an order worth Rs 66.18 crore from Hild Projects for the supply of power cables.

between \$30 Million to \$75 Million.

- **Ceigall India** has secured a significant infrastructure order exceeding Rs 1,000 crore in Madhya Pradesh. Its subsidiary, Ceigall Infra Projects Private Ltd, will construct the Indore-Ujjain Greenfield four-lane highway. The project, to be executed under the Hybrid Annuity Model, will take 24 months. This development is set to boost regional connectivity and access to key hubs.
- **Solarworld Energy Solutions** said that it has received a new EPC contract from NTPC Renewable Energy. The aggregate value of the order is Rs. 725.33 Crore.
- **Waa Solar** has received a contract worth Rs 225 crore from M.P. Urja Vikas Nigam (MPUVNL) for setting up grid-connected solar photovoltaic (PV) power plant.
- **Arfin India** announced that it has received a fresh order worth Rs 321 crore from Diamond Power Infrastructure Limited for the supply of aluminium sector conductor.
- **Arvind Fashions** said that it would acquire Flipkart Group's stake in Arvind Youth Brands (AYBPL) for Rs 135 crore, thereby making AYBPL a wholly owned subsidiary.
- **Madhav Infra Projects** announced that it has received multiple Letters of Award (LoAs) worth Rs 342 crore from M.P. Urja Vikas Nigam (MPUVNL), a Government of Madhya Pradesh enterprise.

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

## Global News

- China's profits industrial firms edged up 0.1% yoy to CNY 6.63 trillion in January-November 2025, notably easing from a 1.9% increase in the first ten months. In November alone, profits fell 13.1% yoy, deepening from October's 5.5% drop.
- Singapore's Domestic Supply Price Index increased by 2.2% year-on-year in November 2025, slowing from an upwardly revised 3.1% growth in the previous month. On a monthly basis, the Domestic Supply Price Index was unchanged, after an upwardly revised 0.5% rise in the preceding period.
- Malaysia's producer prices fell 1.8% year-on-year in November 2025, accelerating from a 0.1% decline in the previous month. On a monthly basis, producer prices slipped 0.3%, following a flat reading in October, underscoring broad weakness across key sectors.

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

## Economic News

- Crude Oil traded at US\$ 57.99/bbl (IST 17:00).
- INR weakened to Rs. 89.99 from Rs. 89.86 against each US\$ resulting in daily change of 0.14%.
- India's industrial production registered an annual growth of 6.7% in November, following October's 0.5% increase. During April to November, industrial production growth slowed to 3.3% from 4.1% in the same period last year.
- India's agriculture sector closed 2025 with a projection of record foodgrain output surpassing last year's 357.73 million tonnes (MT) despite US tariffs disrupting farm exports, while landmark GST reforms delivered input cost relief, and stakeholders await passage of key seed and pesticide bills in 2026 to tackle fake inputs.
- India and Australia celebrate three years of their trade agreement. Indian exports to Australia have grown significantly. From January 1, 2026, Australian tariffs on Indian goods will be zero. This opens new opportunities for Indian businesses. The agreement benefits manufacturing, agriculture, and other sectors.

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

## Forthcoming Events

### Board Meetings as on 30/12/2025

Finkurve Financial Services Limited	Fund Raising
STEEL EXCHANGE INDIA LIMITED	Fund Raising

(Source: NSE)

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