

Market Commentary

Overnight global action:

On 29th Dec 2025, US market delivered a negative performance with S&P500 down by -2.11 pts (-0.03%), Dow Jones down by -20.19 pts (-0.04%) and Nasdaq down by -11.76 pts (-0.05%). Gift Nifty declined by -8.5 pts (-0.03%) indicating Indian markets will open negatively. Advance-Dcline ratio on NSE was 3233:1350 and on BSE was 1798:2394 which showed balance in the overall markets.

Index Options Data Analysis:

Sensex max call OI is at 85500 max put OI is at 85400 with PCR of 1  
Nifty max call OI is at 26000 max put OI is at 26200 with PCR of 0.92  
Bank Nifty max call OI and put OI both are at 59500 with PCR of 0.69

Securities in Ban for F&O Trade:

SAMMAANCAP

Sector Performance:

NIFTY AUTO index grew by 0.58% driven by Tube Investments of India Ltd. (+0.2%) and Eicher Motors Ltd. (+0.16%)

NIFTY FMCG index declined by -0.24% driven by ITC Ltd. (-0.6%) and Dabur India Ltd. (-0.6%)

NIFTY IT index grew by 0.47% driven by Oracle Financial Services Software Ltd. (%) and Infosys Ltd. (%)

NIFTY METAL index grew by 2.63% driven by Hindustan Copper Ltd. (+8.9%) and National Aluminium Company Ltd. (+3.91%)

NIFTY PHARMA index grew by 0.11% driven by Ipca Laboratories Ltd. (+1.8%) and Abbott India Ltd. (+1.37%)

NIFTY PSU BANK index grew by 0.15% driven by Canara Bank (+0.3%) and Indian Bank (+0.16%)

NIFTY PRIVATE BANK index grew by 0.45% driven by IDFC First Bank Ltd. (+1%) and IndusInd Bank Ltd. (+0.21%)

NIFTY REALTY index grew by 1.53% driven by Oberoi Realty Ltd. (+0.5%) and Sobha Ltd. (+0.14%)

NIFTY CONSUMER DURABLES index grew by 1.46% driven by Titan Company Ltd. (+2.1%) and Kalyan Jewellers India Ltd. (+0.81%)

NIFTY OIL & GAS index grew by 1.11% driven by Castrol India Ltd. (+2.2%) and Adani Total Gas Ltd. (+0.81%)

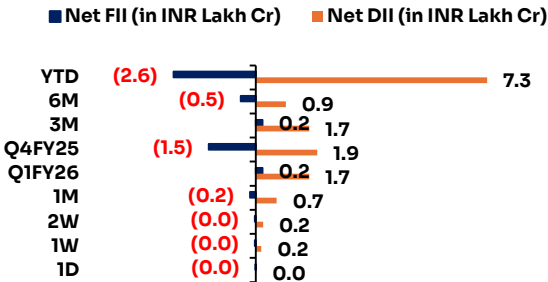
NIFTY CHEMICALS Index grew by 0.69% driven by Linde India Ltd. (+2.1%) and Deepak Nitrite Ltd. (+1.42%)

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Fund Flow	Buy	Sell	Net
FII/FPI	12,832	13,150	-318
DII	9,981	8,208	1,773



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	26,099	0.0%	9.8%	23.7
Sensex 30	85,041	-0.4%	8.8%	22.2
Nifty 50	26,042	-0.4%	10.1%	23.6
India VIX	9	-0.4%	-36.7%	
Nifty Bank	59,011	-0.3%	16.0%	17.4
Nifty Next 50	68,961	0.0%	1.4%	69.0
Nifty 500	23,780	-0.3%	6.3%	22.3
Nifty Mid 100	60,314	-0.2%	5.5%	31.0
Nifty Small 250	16,614	-0.2%	-6.4%	28.0
USD/INR	90	0.1%	5.0%	
India 10Y	6.6%			
India 2Y	5.8%			
India 1Y	5.6%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	6,930	0.0%	17.8%	30.0
Dow Jones	48,711	0.0%	14.5%	23.5
Nasdaq 100	25,644	-0.1%	22.1%	42.1
FTSE 100	9,871	-0.2%	20.8%	15.6
CAC 40	8,104	0.0%	9.8%	23.8
DAX	24,340	0.2%	22.3%	25.4
Nikkei 225	50,670	-0.2%	26.9%	27.0
Hang Seng	25,819	0.2%	28.7%	12.5
Shanghai Comp	3,964	0.1%	18.3%	17.9
KOSPI	4,198	1.7%	74.9%	20.8
S&P/ASX 200	8,751	-0.1%	7.2%	23.1

## Stocks in the News

### Vikran Engineering Limited (CMP: ₹1,250.5, MCap: 8,950 Cr)

Vikran Engineering secured a landmark ₹459.20 crore EPC contract from NTPC Renewable Energy Ltd for Balance of System (BoS) execution of a 400 MW AC grid-connected solar power project at Chitrakoot-1, Uttar Pradesh. The 12-month project involves inland transportation, insurance, installation, testing, commissioning, and guarantee tests, adhering to NTPC's stringent technical and safety standards. This order follows a ₹2,035 crore win earlier in the week, significantly bolstering the order book and validating Vikran's expertise in utility-scale solar infrastructure across 14 states.

[News Source](#) [cepl-ai-file-upload.s3.amazonaws+1](#)

### Brainbees Solutions Limited (CMP: ₹879.7, MCap: 19,242 Cr)

FirstCry parent Brainbees Solutions completed acquisition of K.A. Enterprises Hygiene Private Limited through wholly-owned subsidiary Swara Baby Products Private Limited, expanding its hygiene products portfolio in the competitive e-commerce baby care segment. This strategic move enhances vertical integration and strengthens market positioning amid festive season demand surge for infant essentials. The transaction follows recent stake acquisitions in fitness vertical, signaling aggressive M&A strategy for portfolio diversification.

[News Source](#) [cepl-ai-file-upload.s3.amazonaws](#)

### Chemcon Speciality Chemicals Limited (CMP: ₹245.3, MCap: 1,380 Cr)

Chemcon announced completion of a key strategic acquisition that bolsters its speciality chemicals manufacturing capabilities, targeting high-margin segments critical for pharmaceutical and agrochemical applications. The move aligns with management's focus on capacity expansion and backward integration to secure raw material supplies amid volatile global pricing. Investors await financial impact disclosure in upcoming quarterly results.

[News Source](#) [cepl-ai-file-upload.s3.amazonaws](#)

### JSW Energy Limited (CMP: ₹675.2, MCap: 1,17,500 Cr)

JSW Energy disclosed material litigation developments under SEBI Regulation 30(4) concerning MERC orders, requiring close monitoring by investors given potential implications for regulatory approvals and project execution timelines. The power major continues aggressive renewable capacity additions despite legal headwinds. Market awaits clarity on resolution timeline and financial impact.

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Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	27,740	-0.5%	21.5%	22.8
Nifty IT	38,572	-1.0%	-11.0%	30.1
Nifty Fin Ser	27,431	-0.5%	16.7%	17.9
Nifty Pharma	22,685	-0.3%	-3.1%	37.3
Nifty Services	33,721	-0.6%	7.3%	37.1
Nifty Cons Dur	36,824	0.3%	-11.9%	49.9
Nifty PSE	9,760	0.5%	2.4%	10.2
Nifty FMCG	55,132	0.0%	-2.9%	38.0
Nifty Pvt Bank	28,404	-0.2%	14.6%	10.6
Nifty PSU Bank	8,287	-0.3%	26.7%	13.6
Nifty Cons	12,232	-0.3%	7.7%	43.2
Nifty Realty	883	-0.2%	-16.1%	38.4
Nifty Infra	9,564	-0.2%	13.0%	22.2
Nifty Energy	35,059	-0.1%	-0.4%	11.1
Nifty Health	14,699	-0.3%	-1.7%	35.2
Nifty India Mfg	15,242	-0.3%	10.3%	28.4
Nifty Metal	10,806	0.6%	24.9%	19.4
Nifty Oil & Gas	11,958	0.0%	11.3%	18.3

## Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
<b>Long</b>		
360ONE	12.7	2.1
INFY	9.1	2.9
MUTHOOTFIN	6.5	0.4
IRCTC	5.6	1.2
BDL	5.6	3.7
<b>Short</b>		
CHOLAFIN	18.5	-3.9
NUVAMA	11.5	-0.5
ASTRAL	6.1	1.1
DALBHARAT	5.2	-0.1
TIINDIA	3.3	-1.6
<b>Long Unwinding</b>		
HFCL	6.1	-0.3
PAYTM	4.9	-0.4
TATACONSUM	3.7	-0.3
MPHASIS	3.1	-0.3
PGEL	3.1	-1.1
<b>Short Unwinding</b>		
CYIENT	-5.6	0.2
HINDZINC	-5.2	0.2
KPITTECH	-5.2	0.2
MANKIND	-4.4	0.3
TATAELXSI	-4.3	0.9

**Vedanta Limited (CMP: ₹485.8, MCap: 1,90,200 Cr)**

Vedanta updated ESG ratings disclosure under SEBI LODR, highlighting sustainability metrics across mining operations amid global pressure for responsible metal production. The ratings reflect improvements in environmental compliance and community engagement programs. Strategic focus on aluminium, zinc, and oil-gas diversification continues despite commodity volatility.

[News Source](#)[cppl-ai-file-upload.s3.amazonaws](#)

**Exxaro Tiles Limited (CMP: ₹92.4, MCap: 1,120 Cr)**

Exxaro Tiles completed postal ballot process with independent scrutineer's certification, marking key corporate governance milestone ahead of potential strategic decisions. Results indicate strong shareholder alignment on proposed resolutions. Ceramics sector player focuses on premium vitrified tile expansion amid real estate recovery.

[News Source](#)[cppl-ai-file-upload.s3.amazonaws](#)

**Gujarat Gas Limited (CMP: ₹585.6, MCap: 40,500 Cr)**

Gujarat Gas MD Milind Torawane (IAS) resigned effective December 24, 2025, triggering leadership transition at India's largest city gas distributor serving 40+ districts. The departure coincides with peak winter gas demand season and aggressive CNG infrastructure expansion. Board to nominate successor amid robust city gas distribution sector growth.

[News Source](#)[cppl-ai-file-upload.s3.amazonaws](#)

**Commodities**

	CMP	1D	YTD
Gold (\$)	4,528	-0.6%	71.4%
Silver (\$)	77.5	0.4%	165.0%
Brent Crude Oil (\$)	61.1	0.7%	-18.2%
WTI Crude Oil (\$)	57.2	0.7%	-20.3%

**Currency**

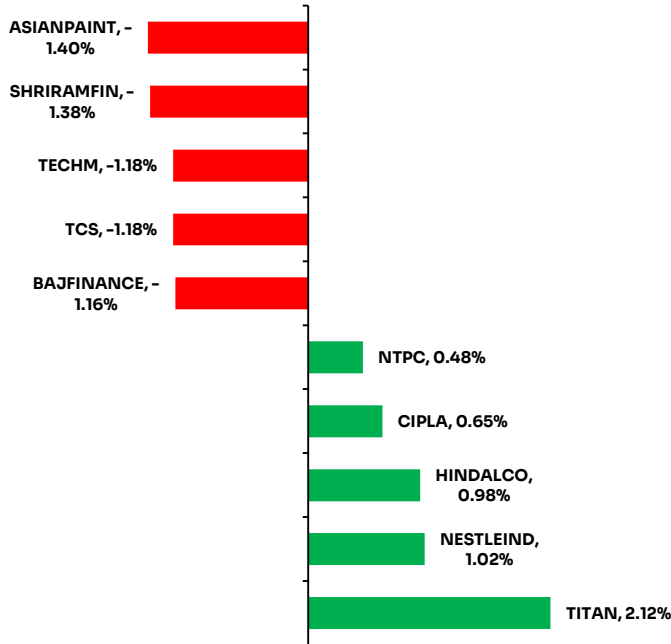
	CMP	1D	YTD
USD/INR	89.8	0.1%	5.0%
EUR/INR	105.8	0.1%	19.4%
GBP/INR	121.2	0.1%	13.3%
JPY/INR	0.6	0.2%	5.5%
EUR/USD	1.2	0.1%	13.8%

**Securities Lending & Borrowing Scheme (SLBS)**
**Company**

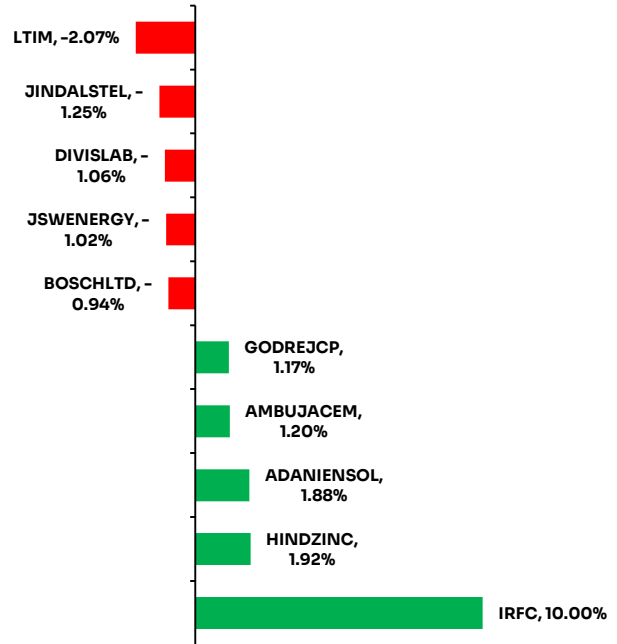
TORNTPHARM	3,835	3,810	0.7
INDHOTEL	743	739	0.5
ICICIGI	1,953	1,943	0.5
GLENMARK	2,018	2,008	0.5
LICI	850	847	0.4

## Top Gainers and Losers

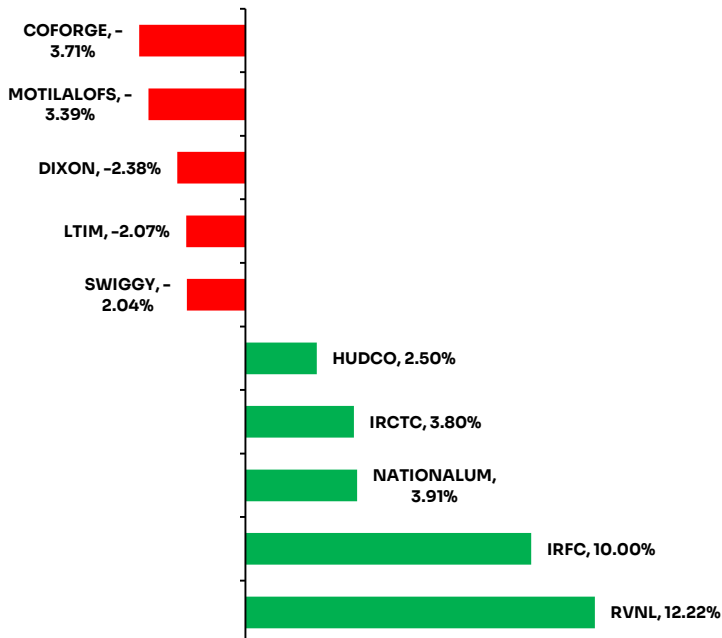
Nifty 50 index



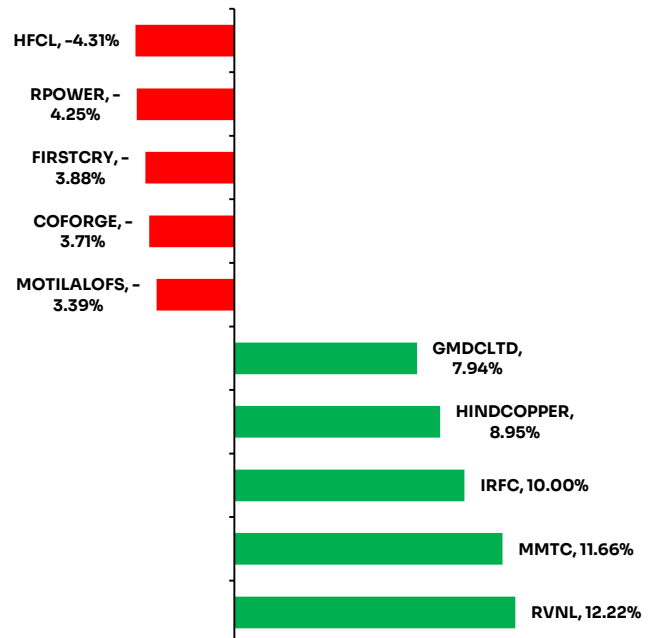
Nifty Next 50 index



Nifty 200 index



Nifty 500 index



## 52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
HINDZINC	640	647	632	24-Dec-25
HINDZINC	640	647	632	24-Dec-25
EICHERMOT	7,330	7,360	7,360	26-Dec-25
HINDCOPPER	477	481	440	24-Dec-25
HINDCOPPER	477	481	440	24-Dec-25

## 52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
UBL	1,605	1,604	1,616	9-Dec-25
ACC	1,736	1,725	1,725	26-Dec-25
TENNIND	450	445	447	16-Dec-25
POLYMED	1,760	1,740	1,740	26-Dec-25
JYOTHYLAB	280	277	277	26-Dec-25

## Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
PANACEABIO	24,466	6,151	2,762	409
20MICRONS	10,772	2,740	1,244	216
ENERGY	5,121	1,393	662	35
BAJEL	3,230	889	444	177
MMTC	71,880	20,035	9,588	65
RACLGear	246	69	39	1,175
IBULLSLTD	14,883	4,196	2,118	17
ITDC	415	117	61	591
STCINDIA	2,149	631	296	131
ATLASCYCLE	40	12	7	99
BANKADD	39	12	6	60
RNBDENIMS	215	65	48	129
HEMIPROP	3,439	1,035	569	141
CUBEXTUB	1,547	468	247	112
RMDRIP	1,365	417	351	79
LAGNAM	59	18	13	76
KARURVYSYA	15,109	4,739	2,736	264
PILANIINVS	17	5	10	5,400
PARACABLES	11,831	3,764	1,929	39
MODTHREAD	5	2	4	44
NEOGEN	688	225	271	1,154
NDTV	7,608	2,490	4,817	101
UNITEDTEA	6	2	2	458
STYLAMIND	764	261	146	2,250
ASTRAZEN	26	9	6	9,027

## Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty Traded	Trade Price
20MICRONS	Dharmik Viththalbhai Kapuriya	SELL	2,74,649	225.2
20MICRONS	Dharmik Viththalbhai Kapuriya	BUY	2,79,054	225.0
20MICRONS	Irage Broking Services Llp	SELL	2,43,451	227.6
20MICRONS	Irage Broking Services Llp	BUY	2,95,439	227.8
20MICRONS	Nk Securities Research Private Limited	SELL	7,79,427	228.4
20MICRONS	Nk Securities Research Private Limited	BUY	7,79,427	227.9
20MICRONS	Pace Stock Broking Services Pvt Ltd	BUY	2,63,313	225.7
20MICRONS	Pace Stock Broking Services Pvt Ltd	SELL	2,63,313	226.0
20MICRONS	Silverleaf Capital Services Private Limited	SELL	5,12,564	224.8
20MICRONS	Silverleaf Capital Services Private Limited	BUY	5,12,564	224.7
BIKEWO	Basan Equity Broking Limited	BUY	80,000	21.7
CUBEXTUB	Swarnim Avenues Private Limited	SELL	2,50,000	106.0
CURIS	Ss Corporate Securities Limited	BUY	61,000	116.5
DAVANGERE	Arihant Capital Markets Limited	SELL	1,15,59,446	3.5
DAVANGERE	Arihant Capital Markets Limited	BUY	3,80,33,116	3.5
DAVANGERE	Irage Broking Services Llp	BUY	1,65,707	3.6
DAVANGERE	Irage Broking Services Llp	SELL	1,06,42,314	3.5
FILATFASH	Prabhat Sethia	SELL	#####	0.4
KRISHFL-RE	India Sme Growth Fund-Series 2	BUY	24,166	33.6
KRISHFL-RE	Vijayabai Chandrakant Rao Mankoskar	SELL	35,000	34.5
MACOBSTECH	Acme Capital Market Limited	SELL	58,400	210.3
MACOBSTECH	Acme Capital Market Limited	BUY	1,00,800	210.0
MACOBSTECH	Acme Corporate Advisors Private Limited	BUY	60,000	209.7
MACOBSTECH	Raman Talwar	SELL	99,200	210.0
MARC	Capacious Wealth Management Llp	BUY	3,28,800	67.2
PANACEABIO	Cit Research Tech Private Ltd	SELL	3,93,146	410.9
PANACEABIO	Cit Research Tech Private Ltd	BUY	3,93,146	410.7
PANACEABIO	Elixir Wealth Management Private Limited	SELL	3,94,594	408.4
PANACEABIO	Elixir Wealth Management Private Limited	BUY	3,98,703	407.5
PANACEABIO	Grt Strategic Ventures Llp	SELL	4,66,205	410.6
PANACEABIO	Grt Strategic Ventures Llp	BUY	4,66,205	410.4
PANACEABIO	Irage Broking Services Llp	SELL	4,91,042	409.7
PANACEABIO	Irage Broking Services Llp	BUY	5,76,798	409.2
PANACEABIO	Jump Trading Financial India Private Limited	SELL	5,50,981	410.5
PANACEABIO	Jump Trading Financial India Private Limited	BUY	5,50,981	409.8
PANACEABIO	Junomoneta Finsol Private Limited	SELL	4,79,206	410.0
PANACEABIO	Junomoneta Finsol Private Limited	BUY	4,79,639	409.5
PANACEABIO	Musigma Securities	SELL	9,48,432	409.3
PANACEABIO	Musigma Securities	BUY	9,48,432	409.2
PANACEABIO	Nk Securities Research Private Limited	BUY	8,95,742	408.6
PANACEABIO	Nk Securities Research Private Limited	SELL	8,95,742	408.8
PANACEABIO	Pace Stock Broking Services Pvt Ltd	BUY	4,49,092	408.3
PANACEABIO	Pace Stock Broking Services Pvt Ltd	SELL	4,49,092	408.7
PANACEABIO	Puma Securities	SELL	4,86,777	410.8
PANACEABIO	Puma Securities	BUY	4,86,777	410.6
PANACEABIO	Silverleaf Capital Services Private Limited	BUY	3,78,742	406.5
PANACEABIO	Silverleaf Capital Services Private Limited	SELL	3,78,742	406.9
QUADFUTURE	Hrti Private Limited	BUY	2,15,281	344.8
QUADFUTURE	Hrti Private Limited	SELL	2,16,407	345.1

Security Name	Client Name	Buy / Sell	Qnty Traded	Trade Price
QUADFUTURE	Junomoneta Finsol Private Limited	SELL	2,14,593	344.3
QUADFUTURE	Junomoneta Finsol Private Limited	BUY	2,14,593	344.1
RICOAUTO	Hrti Private Limited	SELL	25,94,057	135.5
RICOAUTO	Hrti Private Limited	BUY	27,60,461	136.2
RICOAUTO	Junomoneta Finsol Private Limited	SELL	17,78,727	136.3
RICOAUTO	Junomoneta Finsol Private Limited	BUY	17,80,956	136.2
RICOAUTO	Mathisys Advisors Llp	BUY	19,76,739	136.2
RICOAUTO	Mathisys Advisors Llp	SELL	19,94,591	135.8
RICOAUTO	Microcurves Trading Private Limited	SELL	8,06,647	137.0
RICOAUTO	Microcurves Trading Private Limited	BUY	8,06,647	137.0
RICOAUTO	Musigma Securities	BUY	8,88,447	136.0
RICOAUTO	Musigma Securities	SELL	8,88,447	136.1
RICOAUTO	Qe Securities Llp	BUY	15,70,106	136.5
RICOAUTO	Qe Securities Llp	SELL	15,83,497	135.2
RVNL	Graviton Research Capital Llp	SELL	1,10,51,300	381.7
RVNL	Graviton Research Capital Llp	BUY	1,10,51,300	381.4
SAWALIYA	Baahubali Enterprise	BUY	10,800	319.0
SAWALIYA	Baahubali Enterprise	SELL	66,600	318.6
SBC	Shyam Ji Enterprise	SELL	4,37,730	28.3
SBC	Shyam Ji Enterprise	BUY	34,37,730	28.3
SHRIKANHA	Alacrity Securities Ltd	SELL	1,00,800	35.7
SHRIKANHA	Mansi Share And Stock Broking Private Limited	SELL	49,600	35.7
SHRIKANHA	Mansi Share And Stock Broking Private Limited	BUY	2,12,800	35.7
SHRIKANHA	Neo Apex Share Broking Services Llp	SELL	99,200	35.7
SHRIKANHA	Neo Apex Share Broking Services Llp	BUY	99,200	35.7
STCINDIA	Ankita Vishal Shah	BUY	3,23,460	142.4
STCINDIA	Ankita Vishal Shah	SELL	3,23,460	144.9
TECHD	Devi Traders Llp	SELL	50,400	644.2
TITAGARH	Graviton Research Capital Llp	SELL	7,40,617	892.9
TITAGARH	Graviton Research Capital Llp	BUY	7,40,617	892.5
VIKRAN	Qe Securities Llp	SELL	14,30,597	101.0
VIKRAN	Qe Securities Llp	BUY	14,43,277	100.9
ZTECH	M/S Rr Family Trust	BUY	84,000	650.0

Security Name	Client Name	Buy / Sell	Qnty Traded	Trade Price
No Deals				



## Insider Trading

Company Name	Person Name	Person Category	Buy / Sell	Shareholding prior	Shareholding post	Trade Price
DBCORP	D B Power Limited	Promoter Group	Buy	1.28	1.29	260.1
DBCORP	D B Power Limited	Promoter Group	Buy	1.27	1.28	260.0
CHALET	Neel C. Raheja	Promoters	Buy	4.72	4.73	900.2
CHALET	Ravi C. Raheja	Promoters	Buy	2.36	2.37	900.2
CHALET	Sanjay Sethi	Director	Sell	0.14	0.12	900.2
ROTO	Shalini Gupta	Promoter Group	Sell	0.33	0.33	71.8
MONEYBOXX	PREM PARKASH GUPTA	Immediate relative	Sell	0.09	0.03	62.5
ASIANILES	Kamleshkumar Bhagubh	Promoters	Buy	5.27	5.40	73.8
KPITTECH	KPIT TECHNOLOGIES LII	Other	Sell	0.74	0.73	10.0
KPITTECH	KPIT TECHNOLOGIES LII	Other	Sell	0.73	0.73	1,224.7
ZENSARTECH	Zensar Employees Welfare	Employees/Designated	Buy	0.33	0.34	729.1
ZENSARTECH	Zensar Employees Welfare	Employees/Designated	Buy	0.34	0.34	738.6
HOMESFY	Mukesh Kumar Mishra	Director	Buy	4.18	4.19	165.0
AVANTEL	P Bala Bhaskar Rao	Employees/Designated	Sell	0.04	0.03	149.8
MEIL	Aniketa Mangal	Promoters	Buy	8.06	8.07	361.5
BIL	Snehdeep Aggarwal	Promoters	Buy	8.53	8.90	NA
TCI	BHORUKA SUPPLY CHA	Promoter Group	Buy	44.11	44.11	1,030.0
INFY	Gavin Sheldon	-	Sell	0.00	0.00	1,645.8
INFY	Gavin Sheldon	-	Buy	0.00	0.00	1,645.8
INFY	Infosys Employee Benefit	Other	Sell	0.22	0.22	1,626.8
TATACAP	Tata Motors Passenger V	Promoter Group	Sell	0.10	0.00	NA
GPIL	VIDUSHI SINGHANIA	Immediate relative	Buy	0.00	0.00	238.0
SHIVALIK	Ashwani Kumar Sharma	Director	Sell	0.39	0.00	NA
JBCHEPHARM	Manish Gumber	Employees/Designated	Sell	0.01	-	1,795.1
JBCHEPHARM	Manish Gumber	Employees/Designated	Pledge Rev	0.01	0.01	1,795.1
IKS	Saransh Mundra	-	Sell	0.00	0.00	1,672.8
IKS	Mundra	Other	Sell	0.01	0.01	1,683.3
IKS	Abhay Kumar Srivastava	-	Sell	0.05	0.05	1,688.6
JAYNECOIND	ARVIND JAYASWAL	Promoters	Pledge Rev	0.52	0.52	70.6
JAYNECOIND	RAMESH JAYASWAL	Promoters	Pledge Rev	0.52	0.52	70.6
JAYNECOIND	BASANT LALL SHAW	Promoters	Pledge Rev	1.34	1.34	70.6
JAYNECOIND	NECO HOLDING PVT LTI	Promoter Group	Pledge Rev	0.05	0.05	70.6
JAYNECOIND	JYOTIKANT INVESTMEN	Promoter Group	Pledge Rev	0.05	0.05	70.6
JAYNECOIND	NAGPUR SCRAP SUPPLI	Promoter Group	Pledge Rev	0.06	0.06	70.6
JAYNECOIND	PARIVAR FOOD INDUST	Promoter Group	Pledge Rev	0.06	0.06	70.6
JAYNECOIND	VIBRANT ELECTRONICS	Promoter Group	Pledge Rev	0.07	0.07	70.6
JAYNECOIND	NAGPUR AGRO AND FC	Promoter Group	Pledge Rev	0.17	0.17	70.6
JAYNECOIND	NECO VALVES AND PUI	Promoter Group	Pledge Rev	0.37	0.37	70.6
JAYNECOIND	NECO LEASING AND FIN	Promoter Group	Pledge Rev	0.37	0.37	70.6
JAYNECOIND	JAYASWAL NECO STEEL	Promoter Group	Pledge Rev	2.27	2.27	70.6
JAYNECOIND	JAYASWAL NECO POWE	Promoter Group	Pledge Rev	4.13	4.13	70.6
JAYNECOIND	APEX SPINNING MILLS F	Promoter Group	Pledge Rev	4.20	4.20	70.6
JAYNECOIND	ANURAG SALES AND SE	Promoter Group	Pledge Rev	4.29	4.29	70.6
JAYNECOIND	AVON SALES AND SERV	Promoter Group	Pledge Rev	4.30	4.30	70.6
JAYNECOIND	JAYASWAL NECO INFR	Promoter Group	Pledge Rev	4.32	4.32	70.6
JAYNECOIND	JAYASWAL NECO META	Promoter Group	Pledge Rev	4.90	4.90	70.6
JAYNECOIND	KARAMVEER IMPEX PRI	Promoter Group	Pledge Rev	5.14	5.14	70.6
JAYNECOIND	NINE STAR PLASTIC PAC	Promoter Group	Pledge Rev	5.21	5.21	70.6

Company Name	Person Name	Person Category	Buy / Sell	Shareholding prior	Shareholding post	Trade Price
JAYNECOIND	JAYASWAL HOLDINGS	Promoter Group	Pledge Rev	5.75	5.75	70.6
JAYNECOIND	KARISHMA JAYASWAL	Promoter Group	Pledge Rev	0.46	0.46	70.6
JAYNECOIND	AVNEESH JAYASWAL	Promoters	Pledge Rev	0.37	0.37	70.6
JAYNECOIND	ANAND JAYASWAL	Promoters	Pledge Rev	0.32	0.32	70.6
JAYNECOIND	NISHA JAYASWAL	Promoters	Pledge Rev	0.28	0.28	70.6
JAYNECOIND	RITA JAYASWAL	Promoters	Pledge Rev	0.28	0.28	70.6
JAYNECOIND	HARGUNN BEDI JAYAS'	Promoter Group	Pledge Rev	0.22	0.22	70.6
JAYNECOIND	ARCHIT JAYASWAL	Promoters	Pledge Rev	0.19	0.19	70.6
JAYNECOIND	RITIKA JAYASWAL	Promoter Group	Pledge Rev	0.02	0.02	70.6
JAYNECOIND	POOJAA AGRAWAL	Promoter Group	Pledge Rev	0.07	0.07	70.6
RPTECH	MKC Family Trust	Promoter Group	Buy	0.00	11.22	NA
RPTECH	Keshav Choudhary	Director	Sell	11.22	0.00	NA
BERGEPAINT	Satyam Jaiswal	Employees/Designated	Sell	0.00	0.00	539.2
JINDRILL	SUDHA APPARELS LTD	Promoter Group	Buy	12.05	12.50	495.7
JINDRILL	SUDHA APPARELS LTD	Promoter Group	Buy	12.50	12.62	495.7
JINDRILL	SUDHA APPARELS LTD	Promoter Group	Buy	12.62	13.00	505.9
JINDRILL	SUDHA APPARELS LTD	Promoter Group	Buy	13.00	13.09	505.9
ECLERX	Eclerx Employee Welfare	Other	Sell	1.74	1.74	4,454.3
ECLERX	Eclerx Employee Welfare	Other	Buy	1.74	1.75	4,519.7
GOKULAGRO	Ritika Infracon Private Li	Promoter Group	Buy	1.11	1.68	NA
NCLIND	NCL Buildtek Ltd	Promoter Group	Buy	1.03	1.04	NA
TEJASCARGO	Manish Bindal	Promoters	Buy	37.61	37.62	253.6
TEJASCARGO	Manish Bindal	Promoters	Buy	37.58	37.61	251.3
USHAMART	Usha Martin Limited Em	Other	Buy	0.11	0.11	448.7
GANDHAR	Gandhar Coals & Mines I -		Buy	0.97	1.07	143.6
KEI	Lalit Sharma	-	Sell	0.08	0.08	4,084.4
KEI	Kishore Kunal	Key Managerial Personn	Sell	0.05	0.04	4,283.9
KSCL	Kaveri Employees Trust	-	Buy	1.28	1.30	945.7
KSCL	Kaveri Employees Trust	-	Buy	1.24	1.27	957.9
KSCL	Kaveri Employees Trust	-	Buy	1.27	1.28	956.0
AURUM	Aurum RealEstate Devel	Promoters	Buy	47.33	47.37	179.8
MEIL	Aniketa Mangal	Promoters	Buy	8.06	8.06	358.5
MEIL	Aniketa Mangal	Promoters	Buy	8.05	8.06	363.5
SIGIND	Mukesh Sangla	Promoters	Buy	3.47	3.48	55.1
IOB	President of India actin	Promoters	Sell	94.61	92.44	10.0
SHREDIGCEM	Girish Mehta	-	Sell	0.07	0.50	89.9
SHREDIGCEM	Girish Mehta	-	Sell	0.10	0.70	90.1
SHREDIGCEM	Girish Mehta	-	Sell	0.12	0.10	90.3
SHREDIGCEM	Girish Mehta	-	Sell	0.13	0.12	90.3
MCL	MR. RAJESHBHAI ODHA	Promoters	Sell	6.63	6.31	50.1
MCL	MR. RAJESH ODHAVJIB -		Sell	6.63	6.31	50.1
MCL	MR. RAJESH ODHAVJIB -		Sell	6.63	6.31	50.1
ALKYLAMINE	Sanjay Murlidhar Patil	-	Buy	0.00	0.00	1,040.0
KIRLOSENG	Kirloskar Systems Privat	Promoter Group	Sell	0.00	0.00	1,269.4
KIRLOSENG	Geetanjali Vikram Kirlos	Promoters	Sell	0.02	0.00	1,243.1
360ONE	NISHANT VASS	Employees/Designated	Sell	0.00	0.00	1,135.3
360ONE	-	-	-	0.00	-	NA
HCG	Ashutosh Kumar	Employees/Designated	Sell	0.12	0.11	725.1
KIRLPNU	KIRLOSKAR SYSTEMS PI	Promoter Group	-	0.00	0.00	1,042.4

Company Name	Person Name	Person Category	Buy / Sell	Shareholding prior	Shareholding post	Trade Price
VERITAAS	DEBOJYOTI BANERJEE	Promoters	Buy	65.53	65.95	116.0
KIRLOSIND	Geetanjali Kirloskar	Promoters	Sell	0.02	0.00	114.2
SHREDIGCEM	True North Fund VI LLP	Promoters	Sell	54.66	9.54	36.8
SARLAPOLY	Hindustan Cotton Com	Promoter Group	Buy	57.05	57.07	37.5
SENCO	Subhasri Sengupta	Employees/Designated	Sell	0.00	0.00	3,326.0
SARLAPOLY	Hindustan Cotton Com	Promoter Group	Buy	57.03	57.05	247.3
CHALET	Sanjay Sethi	Director	Buy	0.11	0.14	247.2
DBREALTY	Vinod K. Goenka	Promoters	Buy	0.34	0.49	11.3
DBREALTY	Jignesh Hasmukhlal Sha	Key Managerial Personn	Sell	0.01	0.01	248.0
MSPL	Jagran Vyapaar Pvt Ltd	Promoter Group	Buy	7.10	7.20	39.1
MSPL	Shree Vinay Finvest P Lt	Promoter Group	Buy	2.26	2.36	39.3
NAVINFLUOR	Mr. Radheshyam Singh	Employees/Designated	Buy	0.00	0.00	256.4
KARURVYSYA	M V Usha	Promoter Group	Sell	0.03	0.03	259.4
KARURVYSYA	MUNUGOOR K VENKATI	Promoters	Sell	0.04	0.04	584.1
GSTL	RAGAVAN RAJKUMAR	Promoters	Buy	19.21	19.60	2,190.0
KARURVYSYA	M V PRAJEETH	Promoter Group	Sell	0.03	0.03	0.0
SHRADHA	SGR HOLDINGS PRIVAT	Promoter Group	Sell	29.78	28.18	0.0
SHRADHA	RIAAAN VENTURES PRIVA	Promoter Group	Buy	0.00	1.60	10.0
DBCORP	D B Power Limited	Promoter Group	Buy	1.25	1.26	10.0
DBCORP	D B Power Limited	Promoter Group	Buy	1.26	1.27	199.0
STEL	SOFREAL MERCANTRAC	Promoter Group	Buy	0.84	0.93	197.7
SAFARI	SAFARI COMMERCIAL LI	Promoter Group	Sell	8.16	7.96	199.0
MILTON	Vikas Jain	Promoters	Buy	7.83	8.01	NA
MILTON	Sunit Jain	Promoter Group	Sell	1.63	1.45	NA
KPITTECH	KPIT TECHNOLOGIES LII	Other	Sell	0.74	0.74	267.6
KPITTECH	Priyamvada Hardikar	Employees/Designated	Buy	0.03	0.03	262.9
NCLIND	NCL Buildtek Ltd	Promoter Group	Buy	0.99	1.03	261.1
NCLIND	KALIDINDI RAVI	Director	Buy	6.57	6.57	267.7
NCLIND	Kakatiya Industries (P) L	Promoter Group	Buy	0.24	0.24	269.7
FUSION	Deepak Madaan	Other	Sell	0.07	0.07	231.7
DEEDEV	Krishan Lalit Bansal	Promoters	Buy	50.80	50.82	201.1
SURYAROSNI	Diwarkar Marketing Priv	Promoter Group	Buy	10.51	10.52	3,163.5
SURYAROSNI	Diwarkar Marketing Priv	Promoter Group	Buy	10.52	10.52	387.4
SURYAROSNI	Vinay Surya	Promoter Group	Buy	1.03	1.03	190.0
SURYAROSNI	Goel Die Cast Limited	Promoter Group	Buy	3.54	3.54	1,059.4

## Event Calendar – Corporate Action (Financial Results/ Dividend/other business matters)

Company	Purpose
AURIGROW	Other business matters
FUSION	Fund Raising
GAYAPROJ	Financial Results
GAYAPROJ	Financial Results
GAYAPROJ	Financial Results
GAYAPROJ	Financial Results
SHAH	Fund Raising/Other business m
SILGO	Fund Raising
SIMBHALS	Financial Results

Global Macro Events (29th Dec 2025)		
Event	Previous	Forecasted
<b>India</b>		
Industrial Production YoY NOV	0.004	0.041
Manufacturing Production YoY NOV	0.018	0.046
RBI Market Borrowing Auctions		
<b>United States</b>		
Pending Home Sales MoM NOV	1.90%	0.70%
Pending Home Sales YoY NOV	-0.40%	-0.60%
Dallas Fed Manufacturing Index DEC	-1040.00%	-250.00%
EIA Crude Oil Stocks Change DEC/19	-1.274M	
EIA Gasoline Stocks Change DEC/19	4.808M	
EIA Crude Oil Imports Change DEC/19	-0.719M	
EIA Cushing Crude Oil Stocks Change DEC/19	-0.742M	
EIA Distillate Fuel Production Change DEC/19	-0.228M	
EIA Distillate Stocks Change DEC/19	1.712M	
EIA Gasoline Production Change DEC/19	0.033M	
EIA Heating Oil Stocks Change DEC/19	0.267M	
EIA Refinery Crude Runs Change DEC/19	0.128M	
3-Month Bill Auction	3.56%	
6-Month Bill Auction	3.49%	
EIA Natural Gas Stocks Change DEC/19	-167Bcf	
Goods Trade Balance Adv NOV		\$-86.0B
Retail Inventories Ex Autos MoM Adv NOV		0.10%
Wholesale Inventories MoM Adv NOV		0.10%
Retail Inventories Ex Autos MoM SEP		
Housing Starts MoM NOV		
<b>Japan</b>		
BoJ Summary of Opinions		
<b>China</b>		
FDI (YTD) YoY NOV		
FDI (YTD) YoY NOV		
<b>Great Britain</b>		
<b>Germany</b>		

## Nifty Spot – Pivot Levels – 29/12/2025

	Closing	Support			Resistance		
		1	2	3	1	2	3
<b>Nifty</b>	26042	25985	25929	25850	26121	26200	25256



Previous week it was mentioned that **Our view is we have a high probability for Nifty to cross 26203 & proceed further towards 26325-26500- 26700. Corrective levels below 25727 are (25710-25492) - (25360-25192) as bounce back level.**

**Nifty crossed 26203 & made a high of 26236.40, but failed to cross 26325 & later Nifty corrected to 26008.** Corrective levels below 26008 are 25727- (25710-25492) - (25360-25192) as bounce back level. If the trend is strong Nifty will not breach **(25710-25492), which if breached then one should wait for (25360-25192)** as bounce back levels. Above 26236 we open for 26325-26500-26700.

**Our view is after minor correction we have a high probability for Nifty to cross 26236 & proceed further towards 26325-26500-26700.** The 200 SMA is 24880.

All the calls/opinions are subject to Disclosures and Disclaimer <http://goo.gl/8bCMYQ>

## Bank Nifty Spot – Pivot Levels – 29/12/2025

	Closing	Support			Resistance		
		1	2	3	1	2	3
Bank Nifty	59011	58912	58813	58679	59145	59279	59378



Previous week it was mentioned **Our view is we have a high probability for Bank Nifty to cross 60114 and reach 61050—62540—63470 area. Corrective levels below 58712 are (58080-57230)-56553-(55933-55345).**

**Bank Nifty made a high of 59478.15 but did not cross 60114 and later corrected to 58947.05.**

Corrective levels below 58947 are 58712-(58080-57230)-56553-(55933-55345). If the trend is strong Bank Nifty will not breach (58080-57230) area. If these levels are breached one should wait for 56553-(55933-55345).

**Above 59478 we open for (59713 -60114- 61050—62540—63470)**

levels. **Our view is after minor correction we have a high probability for Bank Nifty to cross 60114 and reach 61050—62540—63470 area.**

The 200 SMA is at 55698.

All the calls/opinions are subject to Disclosures and Disclaimer

<http://goo.gl/8bCMYQ>

## Craftsman Automation Limited – Technical Stock Call – 29/12/2025

Technical Stock Call	Action	Reco	Target	Support	SL
Craftsman Automation Limited	BUY	7370	10300	(7100-6885)-6730-(6550-6430)	6150



### View-Short Term Bullish

Primary move in stock commenced from 4420 (May 2025).

Stock started trading above averages & gradually reached high of 7254.5 (Aug 2025). Lower peaks were formed, Profit booking followed & the stock gave a valid correction making a low of 6324 (Oct 25). During the full up move the stock took support of averages and Super Trend was in Positive mode.

Recently after consolidating between Aug 2025 & Dec 2025, the stock has given a Ascending triangle break out reaching a high of **7444**.

**MACD, Aroon uptown & William % R & indicator suggest further Up Trend.**

Probability of Further Up Move is very high. Target of **10300** is expected with lower support levels at **(7100-6885)-6730-(6550-6430)** in case of intermediate fall. A stop loss of **6150** is to be followed in the trade.

All the calls/opinions are subject to Disclosures and Disclaimer

<http://qoo.gl/8bCMYQ>



## News

### Stock Specific News

**Gujarat State Petronet Limited** (CMP: ₹312.7, MCap: 17,800 Cr)

GSPL Executive Director Milind Torawane resigned effective December 24 from gas pipeline infrastructure major operating 15,000+ km network across Gujarat. The simultaneous exit from parent Gujarat Gas signals major leadership realignment in state's gas ecosystem ahead of expansion capex cycle.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Subex Limited** (CMP: ₹145.2, MCap: 4,020 Cr)

Subex appointed new independent Director strengthening telecom analytics governance amid 5G rollout and cybersecurity demand surge. The board addition brings expertise in digital transformation critical for AI-driven revenue assurance solutions. Strategic positioning for global telco contracts expansion.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Bharat Heavy Electricals Limited** (CMP: ₹285.9, MCap: 99,200 Cr)

BHEL announced senior management change impacting execution of ₹2 lakh crore order pipeline across thermal, hydro, and nuclear projects. Leadership transition occurs amid accelerated defence and metro rail order inflows. PSU giant targets 15% revenue growth FY26.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Aaron Industries Limited** (CMP: ₹320.4, MCap: 980 Cr)

Aaron Industries showcased EVOQ360 smart metering network expansion at Raipur generating strong B2B traction for annual maintenance contracts. The event highlighted IoT-enabled energy management solutions amid national smart meter rollout acceleration. Order pipeline visibility improves significantly.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**DCX Systems Limited** (CMP: ₹345.1, MCap: 8,650 Cr)

DCX Systems responded to NSE price movement query affirming no undisclosed material information, maintaining compliance amid 20%+ weekly gains. Defence electronics player benefits from ₹15,000 crore domestic order pipeline and export momentum to friendly nations.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Birla Corporation Limited** (CMP: ₹1,285.7, MCap: 7,950 Cr)

Birla Corp updated credit ratings for cement subsidiaries RCCPL and BCL signaling improved financial flexibility for capacity expansion amid infra boom. MP Birla group cement arm targets 20 MTPA capacity addition by FY28.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**InterGlobe Aviation Limited (IndiGo)** (CMP: ₹4,850.3, MCap: 1,87,000 Cr)

IndiGo disclosed tax authority orders requiring appellate remedies, standard compliance matter for aviation major expanding to 400+ aircraft fleet. International network growth continues despite regulatory scrutiny.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Mrs. Bectors Food Specialities Limited** (CMP: ₹1,420.5, MCap: 8,720 Cr)

Mrs Bectors scheduled analyst meetings to discuss bakery segment growth amid premiumisation trend and festive season volume surge. English Oven brand targets 25% revenue growth FY26 through distribution expansion.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Sukhjit Starch & Chemicals Limited** (CMP: ₹485.2, MCap: 1,520 Cr)

Sukhjit Starch announced institutional investor meetings covering Q3 performance and maize processing

capacity utilization at 90%+. Agro-processing leader benefits from ethanol blending policy tailwinds.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Vishnu Chemicals Limited** (CMP: ₹425.8, MCap: 4,350 Cr)

Vishnu Chemicals scheduled multiple investor interactions Jan 2 & 30 to showcase specialty chemical export growth to Europe/US amid China+1 diversification. Lithium derivative capacity expansion on track.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Whirlpool of India Limited** (CMP: ₹1,980.4, MCap: 25,300 Cr)

Whirlpool disclosed regulatory orders impacting consumer durables operations, routine compliance matter for market leader. Premium appliance portfolio drives 15% festive sales growth.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Finkurve Financial Services Limited** (CMP: ₹125.6, MCap: 980 Cr)

Finkurve enhanced credit ratings reflecting 40% AUM growth in MSME lending amid digital transformation. NBFC targets ₹5,000 crore book size FY26.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Megastar Foods Limited** (CMP: ₹95.2, MCap: 285 Cr)

Megastar Foods announced credit rating upgrade supporting dairy processing capacity expansion to 5 lakh litres/day. Basmath plant utilization crosses 80%.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Ag i Infra Limited** (CMP: ₹78.5, MCap: 1,250 Cr)

AGI Infra secured RERA registration for key infrastructure project enabling construction commencement and pre-sales momentum. HAM model expertise drives order pipeline.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Bhandari Hosiery Exports Limited** (CMP: ₹6.85, MCap: 85 Cr)

Bhandari Hosiery intimated board meeting under Reg 29A for strategic decisions including potential fundraising. Textile exporter targets EU/US market recovery.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Precision Camshafts Limited** (CMP: ₹718.95, MCap: 5,567 Cr)

Precision Camshafts closed trading window ahead of Q3 results showcasing auto ancillary export growth to Europe. Machining capacity utilization nears 85%.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

**Teamo Productions HQ Limited** (CMP: ₹145.3, MCap: 320 Cr)

Teamo Productions clarified NSE price query affirming regulatory compliance amid 30% rally. Media content production pipeline remains robust.

[News Sourceppl-ai-file-upload.s3.amazonaws](#)

## News - December 26-29, 2025

**NTPC Renewable Energy** (CMP: ₹425.8, MCap: 4,350 Cr)

NTPC Renewable Energy awarded multiple mega solar EPC contracts totaling over ₹10,000 Cr in December, including landmark 400 MW Chitrakoot-1 project. The state-owned green energy arm accelerates 20 GW capacity addition target by FY27 amid PLI scheme tailwinds and falling module prices. Aggressive tendering signals India's renewable dominance push.

[News Sourceppl-magazine-india](#)

**Titan Company Limited** (CMP: ₹3,850.2, MCap: 3,42,000 Cr)

Titan emerged top Nifty gainer (+2.17%) amid festive jewellery demand surge and wedding season inventory build-up. Tanishq brand clocked record quarterly sales while wearables segment grew 45% YoY. Management

guides 25% revenue growth FY26 despite gold price volatility.

[News Source5paisa](#)

**Hindalco Industries Limited** (CMP: ₹685.4, MCap: 1,45,200 Cr)

Hindalco gained 0.99% leading metal pack recovery on global aluminium price rebound and robust Q3 auto sector demand. Novelis recycling arm hits record EBITDA while domestic alumina cost advantages sustain margins. Copper expansion capex on schedule.

[News Source5paisa](#)

**Nestle India Limited** (CMP: ₹2,785.6, MCap: 2,69,000 Cr)

Nestle India rose 0.82% bucking FMCG weakness on strong Maggi and Nescafe volume growth amid rural recovery. Premiumisation drives 12% H1FY26 growth guidance while coffee capacity expansion supports exports. Health drinks portfolio gains urban traction.

[News Source5paisa](#)

**IDFC First Bank Limited** (CMP: ₹82.5, MCap: 57,200 Cr)

IDFC First Bank topped Bank Nifty gains (+1.02%) on robust deposit growth and retail loan book expansion to ₹2 lakh Cr. CASA ratio improvement to 45%+ signals liability franchise strength. Retail deposits surge 28% YoY.

[News Source5paisa](#)

**Power Finance Corporation Limited** (CMP: ₹485.2, MCap: 1,61,000 Cr)

PFC gained 0.75% leading financial services amid renewable financing boom and RBI rate cut expectations. Loan book crosses ₹5 lakh Cr milestone with 90%+ power sector exposure. RE project sanctions hit record ₹1.2 lakh Cr FY25.

[News Source5paisa](#)

**REC Limited** (CMP: ₹485.6, MCap: 1,28,500 Cr)

REC rose 0.69% on strong Q3 disbursement guidance of ₹1.2 lakh Cr and healthy 18% net interest margins. NBFC focuses 60% book on renewables while solar financing grows 40% YoY. Dividend payout ratio maintained at 25%.

[News Source5paisa](#)

**Axis Bank Limited** (CMP: ₹1,259.45, MCap: 3,90,937 Cr)

Axis Bank gained 0.22% bucking banking weakness on stable NIM trajectory and corporate loan growth revival. Treasury gains support Q3 profitability while digital acquisitions drive 25% CASA growth. Target price upgrades post analyst meets.

[News Sourcecppl-ai-file-upload.s3.amazonaws](#)

**Canara Bank** (CMP: ₹98.7, MCap: 91,200 Cr)

Canara Bank rose 0.20% amid PSU bank rotation on attractive 1.2x FY26 PBV valuations and 18% RoE trajectory. Loan growth accelerates to 15% with MSME focus while NIM stable at 3.2%. Dividend yield appeals value investors.

[News Source5paisa](#)

**Persistent Systems Limited** (CMP: ₹5,250.8, MCap: 40,800 Cr)

Persistent executed SPA for restructuring enhancing digital engineering focus amid \$1B+ FY26 revenue guidance. AI-led deal wins cross 50% growth while healthcare vertical hits record \$300M ARR. US market share gains accelerate.

[News Sourcecppl-ai-file-upload.s3.amazonaws](#)

## News - December 26-29, 2025 (Section 2: Macro & Sector Updates)

**Nifty Financial Services Index** (CMP: Index 26,850, +0.15%)

Nifty Financial Services slipped 0.9% amid profit booking in banking heavyweights despite robust credit growth data. Sector faces FII outflows pressure but DII buying supports valuations at 1.8x FY26 PBV. RBI rate cut

expectations provide cushion ahead of December policy.

[News Sourcebusiness-standard](#)

**Bank Nifty Index** (CMP: Index 59,681, +0.22%)

Bank Nifty hit new all-time high before profit booking; resistance at 60,000–60,100 critical for rally continuation toward 60,600. PSU banks rotate into favor on 1.2x valuations while private banks consolidate post Q3 guidance. Support at 59,332.

[News Sourcespidersoftwareindia](#)

**IPO Market Boom 2025** (Total: ₹1.6 Lakh Cr)

India's IPO market shattered records with ₹1.6 lakh crore raised, led by insurers, jewelers, and e-commerce platforms rushing public listings. Only 26% proceeds allocated to capex per BoB study raises long-term investment concerns amid debt repayment focus.

[News Sourcebloomberg](#)

**Q2 GDP Growth** (8.2% YoY)

India's Q2 GDP surged 8.2% beating estimates, driven by manufacturing revival and services resilience. Fiscal deficit widened to 52.6% of target but RBI likely holds rates amid inflation control. Strong capex momentum supports Nifty 29,300 FY26 target.

[News Sourceyoutube](#)

**Rupee vs USD** (CMP: ₹89.87)

Indian Rupee hit record low of ₹89.87 amid FPI outflows, trade uncertainties, and US tariff threats. Exporters diversify to Vietnam/Europe while RBI intervenes at key levels. Dollar index strength adds pressure ahead of Fed commentary.

[News Sourcebusiness-standard](#)

**Nifty Midcap Index** (CMP: Index 52,450, -0.22%)

Nifty Midcap fell 0.22% reflecting selective profit booking in high-beta names despite strong underlying earnings growth. Smallcaps down 0.55% as valuations stretch to 32x FY26 PE. Quality rotation favors infra, renewables over speculative themes.

[News Sourcebusiness-standard](#)

**FII vs DII Flows** (FII: -₹12,500 Cr, DII: +₹15,200 Cr)

FIIs sold ₹12,500 Cr amid global risk-off while DIIs absorbed flows with record ₹15,200 Cr buying. Domestic mutual funds hit ₹70 lakh Cr AUM milestone supporting structural bull market. Buy-on-dips strategy prevails.

[News Sourcegoodreturns](#)

**Sensex Closing** (CMP: 85,138, -503 pts)

Sensex closed at 85,138 down 503 points or 0.59% dragged by financials, metals, and Reliance. Asian Paints, Bharti Airtel, Maruti bucked trend amid sectoral rotation. Broader markets remain structurally bullish per analysts.

[News Sourcebusiness-standard](#)

**RBI MPC Preview** (Dec Meeting)

RBI MPC faces rate cut calls despite 8.2% GDP; 25 bps reduction widely anticipated amid favorable inflation trajectory. Repo rate steady at 6.25% likely with liquidity measures to support festive credit demand. Markets price in 75 bps cuts FY26.

[News Sourceyoutube](#)

**Capacity Utilisation Revival** (78%+ Industry Avg)

FICCI reports capacity utilization crossing 78% signaling private capex revival led by auto, cement, steel sectors. Government fiscal consolidation enables crowding-in effect for ₹12 lakh Cr corporate investments FY26. Infrastructure multiplier accelerates.

[News Sourcegoodreturns](#)

**##Companies with Investor Presentation or Annual Report Entries****##Macro/Non-Stock News****Markets Reopen Dec 29**

Indian markets resume trading Monday December 29 after Christmas weekend closure with year-end positioning dominating sentiment. January 1, 2026 confirmed as trading day per BSE/NSE holiday calendars signaling uninterrupted New Year momentum.[goodreturns](#)

**Nifty Range-Bound Outlook**

Nifty expected to consolidate 25,900-26,300 next week amid IIP data release and FII flows. Bearish candlestick patterns signal profit booking but 58,300-58,600 Bank Nifty support holds constructive structure.[goodreturns](#)

**IIP Data Dec 29**

Industrial Production numbers release Monday to validate manufacturing rebound and 78%+ capacity utilization. Auto, cement sectors capex revival key trigger for post-holiday directional move.[goodreturns](#)

**India-NZ FTA Signed**

India-New Zealand Free Trade Agreement boosts dairy, pharma exports amid Indo-Pacific diversification. Agreement counters China dependency while supporting agri-processing stocks.[goodreturns](#)

**Core Infra Growth Slows**

Eight core infrastructure sectors expanded just 1.8% in November versus 7%+ consensus signaling construction slowdown. Cement, steel stocks face headwinds despite long-term infra tailwinds.[goodreturns](#)

**Q3 Results January 2026**

Corporate earnings season kicks off January with margin surprises and guidance upgrades critical for valuation justification. IT, banking, metals lead early reporting calendar.[goodreturns](#)

**FII Outflows Persist**

Foreign investors sold ₹1,721 Cr on Dec 24 extending December net outflow to ₹23,830 Cr. DIIs counter with ₹62,000 Cr buying maintaining market stability.[goodreturns](#)

**India VIX Historic Lows**

Volatility index hits record lows signaling indecision phase ahead of decisive macro triggers. Compressed VIX historically precedes large directional moves.[goodreturns](#)

**Nifty Midcaps Fatigue**

Nifty Midcap100 slipped 0.2% reflecting profit booking after strong rally. Metals outperformed (+0.6%) on global commodity strength while high-beta names corrected.[goodreturns](#)

**Domestic Investors Anchor**

DIIs injected \$77B offsetting \$17B FII exodus ensuring market stability. Analysts project Nifty 28,500 by mid-2026 on robust domestic flows.[reuters](#)

**No Market Holiday Jan 1**

BSE/NSE confirm equity trading open January 1, 2026 unlike banking holidays. Year-end rebalancing flows expected to drive first session volatility.[etnownews](#)

**Smallcap Weakest Year**

Smallcaps delivered worst performance in 7 years prompting 2026 caution. Ventura Securities advises selective large-cap consumption bets.[economictimes](#)

**Analyst Nifty Target 28,500**

Reuters poll of 25 analysts projects Nifty reaching 28,500 by mid-2026 despite FII selling. Sensex targets 92,400 driven by domestic liquidity. [reuters](#)

**Corporate Earnings Muted**

Mid-single digit profit growth persists despite 7.3% GDP trajectory raising valuation sustainability concerns at 25x forward PE. [reuters](#)

**Largecaps Preferred 2026**

Ventura's Vinit Bolinjkar recommends quality largecaps with consumption focus as inflation bottoms. Smallcaps face IPO supply pressure. [youtube](#)

**IndiGo Operational Crisis**

InterGlobe Aviation shares plunged 8.3% amid major disruptions from revised FDTL norms catching inadequate pilot rostering. UBS maintains 'buy' but cuts target to ₹6,350 citing short-term capacity constraints during peak winter season. [moneycontrol](#)

**News - December 26-29, 2025 (Additional Company & Market Updates)****Asian Paints Pressure**

Asian Paints led Nifty declines with 1.40% loss amid margin compression fears from rising crude prices and competitive pricing pressures. Festive volume growth offset by input cost inflation challenging paint industry leaders. [5paisa](#)

**Bajaj Finance Selloff**

Bajaj Finance tumbled 1.52% extending losses as unsecured lending scrutiny intensifies post-RBI guidelines. NBFC giant faces growth moderation while asset quality remains pristine. [5paisa](#)

**Shriram Finance Weakness**

Shriram Finance dropped 1.37% amid used vehicle financing slowdown during festive peak. Rural recovery trajectory intact but quarterly guidance critical for sentiment revival. [5paisa](#)

**TCS Correction**

TCS shed 1.27% bucking selective IT resilience on US client spending freeze and deal ramp-up delays. Constant currency growth guidance holds key for valuation support. [5paisa](#)

**Tech Mahindra Decline**

Tech Mahindra fell 1.16% despite 5G telecom exposure amid broader IT sector rotation. Engineering services vertical provides margin cushion through Q3. [5paisa](#)

**HDFC Bank Drag**

HDFC Bank declined 0.52% reflecting deposit mobilization challenges and merger integration costs. CASA revival underway supporting long-term franchise value. [5paisa](#)

**ICICI Bank Pressure**

ICICI Bank lost 0.65% amid private bank rotation favoring PSU peers on attractive valuations. Corporate loan book revival offsets retail slowdown. [5paisa](#)

**Bank of Baroda Weakness**

Bank of Baroda topped Bank Nifty losers down 1.03% despite strong MSME lending growth. PSU bank rotation faces profit booking after recent outperformance. [5paisa](#)

**PNB Decline**

PNB slipped 0.56% amid broader PSU banking correction despite healthy loan growth trajectory. Dividend yield maintains value investor interest. [5paisa](#)



**Titan Company Resilience**

Titan bucked market weakness gaining 2.17% led by record Tanishq festive sales and wearables

**Indoco Remedies FDA Clearance**

Indoco Remedies gained 2.3% after US FDA issued clean inspection report for Patalganga API facility. Successful audit validates export manufacturing standards boosting US generics pipeline approvals.[moneycontrol](#)

**Dhampur Sugar Weakness**

Dhampur Sugar tumbled 3.53% amid ethanol policy uncertainty and subdued crushing margins despite record sugarcane arrivals. Agri-processing stocks face headwinds from delayed blending targets.[moneycontrol](#)

**Park Medi World IPO**

North India hospital chain Park Medi World IPO opens Dec 10 commanding 20% GMP at ₹193. Healthcare IPO momentum continues with 15% grey market premium signaling strong subscription prospects.[business-standard](#)

**DCM Shriram Buy Call**

DCM Shriram emerges analyst favorite at ₹1,276 target leveraging agri-inputs and chemicals diversification. Caustic soda capacity expansion supports 18% EBITDA growth trajectory.[thehindubusinessline](#)

**Indus Towers Recommendation**

Indus Towers highlighted at ₹415.70 buy amid telecom capex revival and 5G rollout acceleration. Towerco benefits from Jio/Airtel network densification investments.[thehindubusinessline](#)

**Kaynes Technology Rally**

Kaynes Tech led NSE volumes surging on electronics manufacturing services demand from defence and railways. EMS sector capex cycle accelerates with PLI scheme disbursements.[moneycontrol](#)

**Hindustan Copper Surge**

Hindustan Copper rallied amid global base metal rebound and domestic mining policy reforms. Khetri expansion targets 12 MT copper cathode capacity by FY28.[moneycontrol](#)

**Hindustan Zinc Recovery**

Vedanta group Hindustan Zinc gained on zinc price uptick and silver byproduct credits. Rampura Agucha mine optimization drives record output volumes.[moneycontrol](#)

**L&T Infra Momentum**

Larsen & Toubro active on NSE amid ₹3.5 lakh Cr order book visibility across metro, highways, and defence projects. Q3 execution guidance critical for re-rating.[moneycontrol](#)

**Vedanta Metals Rally**

Vedanta led metals recovery leveraging aluminium smelter restarts and zinc-lead output normalization. Sterlite Copper revival adds long-term growth trigger.[moneycontrol](#)

**Bharat Electronics Pressure**

BEL faced selling amid elevated defence valuations despite ₹75,000 Cr order pipeline. Execution risks and inventory buildup weigh on near-term momentum.[moneycontrol](#)

**JSW Steel Correction**

JSW Steel declined amid China steel dumping concerns and coking coal price volatility. Domestic infra demand provides long-term support.[moneycontrol](#)

**Trent Retail Weakness**

Trent faced profit booking after Zudio hyper-growth phase despite 35% same-store sales expansion. Valuation stretch prompts consolidation.[business-standard](#)

**Eternal Heavy Loss**

Eternal emerged biggest Nifty loser down 4.8% amid unexplained price action prompting NSE scrutiny. Low-float stock volatility spikes.[business-standard](#)

**Tech Mahindra Outperformance**

Tech Mahindra sole Sensex gainer up 1.3% bucking IT weakness on 5G telecom deals and engineering services ramp-up. Margin recovery underway.[business-standard](#)

**Wipro Resilience**

Wipro gained amid large deal wins offsetting macro IT slowdown. DCFSU business hits \$1B ARR milestone.[moneycontrol](#)

**HDFC Life Insurance Rally**

HDFC Life advanced on individual premium growth acceleration and bancassurance expansion. VNB margins expand to 28% trajectory.[moneycontrol](#)

**HCL Technologies Recovery**

HCL Tech rebounded leveraging engineering and R&D services strength amid US client tech spend normalization.[moneycontrol](#)

**HDFC Bank Stability**

HDFC Bank provided market support amid retail deposit mobilization and loan book rebalancing. CASA revival underway.[moneycontrol](#)



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