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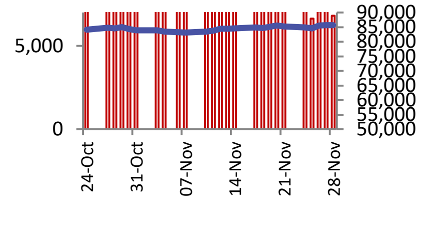
Daily Report

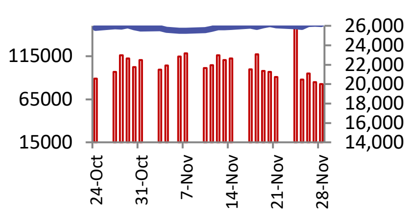
03rd December, 2025

BSE



Open	85326
High	85554
Low	85053
Close	85138
Change	-504
Volume (Lacs)	5894
Turnover (Rs.inCr)	8151

NSE



Open	26088
High	26155
Low	25998
Close	26032
Change	-144
Volume(Lacs)	48778
Turnover(Rs.in Cr)	93814

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	47474	47289	185	0.39%
Dow Futures	47620	47544	76	0.16%
Nasdaq	23414	23276	138	0.59%
FTSE	9702	9703	(1)	-0.01%
Nikkei	49863	49303	559	1.13%
Hang Seng	25848	26095	(247)	-0.95%
Gift Nifty	26190	26207	(17)	-0.06%
Straits Singapore	4548	4538	10	0.23%
South Korea	4039	3995	44	1.09%
Taiwan	27718	27564	153	0.56%
Shanghai	3887	3898	(10)	-0.26%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper ($/MT)	11145	11252	(107)	-1.0%
Alumin ($/MT)	2866	2893	(28)	-1.0%
Zinc ($/MT)	3063	3097	(34)	-1.1%
Brent Crude ($/bbl)	62	62	(0)	-0.4%
Gold ($/Ounce)	4226	4206	21	0.5%
Silver ($/Ounce)	59	58	0	0.5%
Light Crude ($/bbl)	58	59	(0)	-0.4%
N G ($/mmbtu)	5	5	0	0.4%
Sugar ($/MT)	429	421	8	2.0%
Rubber (Rs./kg)	185	185	0	0.0%
Baltic Dry Index	2600	2583	17	0.7%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./$ rate	89.88	89.56	0.35%
Rs./ Euro	104.36	104.09	0.26%
Rs./Chinese Yuan	12.72	12.71	0.07%
Yen /$ rate	155.72	155.88	-0.10%
$ US/Euro	1.16	1.16	0.12%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.23	99.36	-0.13%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	26160	59540
Support 2	26100	59420
Resistance	26300	59870

Securities in Ban For Trade
SAMMAANCAP

Market Review

US: U.S. stocks closed higher to record their sixth gain in seven sessions in muted trading on Tuesday, buoyed by gains in technology shares as expectations the Federal Reserve will cut interest rates next week remain elevated.

Asia: Asian stocks traded within tight ranges early on Wednesday, mirroring similar moves on Wall Street, as investors awaited fresh catalysts while a rebound in cryptocurrencies lost steam.

India: The Indian equity benchmark indices, tanked in trade on Tuesday primarily due to selling pressure in prominent bank stocks and Reliance Industries, alongside continued foreign fund outflows. **The market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy: South Korea's economy expanded by 1.3% in the third quarter, faster than the bank's earlier estimate of 1.2%. It was the fastest quarterly growth since the fourth quarter of 2021, when the economy grew by 1.6%. On an annual basis, gross domestic product increased 1.8% in the third quarter, also better than the advanced estimate of 1.7%.

South Korea's headline CPI inflation remained unchanged at 2.4% Y-o-Y in Nov'25. The November inflation figure came in slightly above the market consensus expectation of 2.3%, while showing a sequential increase of 0.25% month-over-month on a seasonally adjusted basis, following a larger 0.44% monthly rise in October.

Italy's unemployment rate decreased to 6.0% in Oct'25 from a revised 6.2% in Sept'25. The country added 75,000 jobs during the month, helping to push the jobless rate below analyst expectations. A survey of nine analysts had forecast an October unemployment rate of 6.1%.Youth unemployment, which measures job-seekers between 15 and 24 years old, showed improvement by dropping to 19.8% from 21.6% in September.

Commodities: Oil prices are experiencing fluctuations due to ongoing developments in the Russia-Ukraine conflict and potential peace talks.

Gold prices were little changed on Wednesday after a 1% drop in the previous session, as a rebound in equities and firm Treasury yields kept pressure on the metal while investors awaited key U.S. data for clues on potential rate cuts later this week.

Currency: The dollar was becalmed on Wednesday, as other assets hogged the limelight, though investors looking ahead to 2026 were starting to position for U.S. rate cuts to weigh on the greenback.

FII Derivative Transactions (Rs. Cr)											
Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value
Index Future	9296	1843	21985	4308	(2465)	146475	28791	139890	27688	6585	1103
Index Option	15103602	2965361	15054679	2955135	10226	1599094	313339	2272210	447273	(673116)	(133934)
Stock Future	266367	18640	214424	15009	3631	5784390	393517	5800539	395565	(16149)	(2048)
Stock Option	217098	15974	217048	15904	70	310330	21007	283986	19268	26344	1739
Total	**15596363**	**3001818**	**15508136**	**2990356**	**11462**	**7840289**	**756654**	**8496625**	**889794**	**(656336)**	**(133140)**

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
25-Nov-25	16728	15753	975
26-Nov-25	17172	12152	5021
27-Nov-25	11233	11736	(504)
28-Nov-25	10671	14160	(3489)
1-Dec-25	9893	10739	(846)
Month to date- Dec	**9893**	**10739**	**(846)**
FII (Prov.) (Rs Cr)	**Buy**	**Sell**	**Net**
26-Nov-25	16232	11454	4778
27-Nov-25	10262	11517	(1255)
28-Nov-25	10175	13970	(3796)
1-Dec-25	8979	10151	(1171)
2-Dec-25	15234	18876	(3642)
Month to date-Dec	**24213**	**29027**	**(4814)**
DII (Prov.) (Rs. Cr)	**Buy**	**Sell**	**Net**
26-Nov-25	16334	10086	6248
27-Nov-25	15559	11618	3941
28-Nov-25	14627	10479	4148
1-Dec-25	13025	10466	2559
2-Dec-25	15195	10549	4646
Month to date-Dec	**28219**	**21015**	**7205**
FII Debt - BBG (Rs. Cr)	**Buy**	**Sell**	**Net**
25-Nov-25	1352	2648	(1296)
26-Nov-25	3128	2345	782
27-Nov-25	1117	941	176
28-Nov-25	2608	2128	481
1-Dec-25	2789	1196	1594
Month to date- Dec	**2789**	**1196**	**1594**

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1482	34%	1185	34%
Decline	2677	62%	2181	63%
Unchanged	168	4%	91	3%

Market Turnover	02-Dec	01-Dec	Var (%)
BSE Cash	8151	7613	7%
NSE Cash	93814	85216	10%
NSE Futures	83341	82565	1%
NSE Options	56750817	27497562	106%
Total (Rs.Cr)	56936122	27672956	106%

Volatility Index	02-Dec	01-Dec
Volatility Index	11.23	11.63

Index PE - TTM	02-Dec	Yr. High	Yr. Low
Sensex	23.2	24.1	20.3
Nifty	22.7	23.0	19.6

Corporate News

Bansal Wire Industries Ltd has received a show-cause notice (SCN) from the Joint Commissioner, SGST, Corporate Circle-I, Ghaziabad Zone-I, Uttar Pradesh, for GST, interest, and penalty for the financial year 2020-21. (CNBC)

Bikaji Foods International Ltd has invested $250,000 in its wholly-owned US subsidiary, Bikaji Foods International USA Corp. The investment involves the purchase of 25,000 common stocks, reinforcing the company's commitment to expanding its presence in the US market. (BS)

Chalet Hotels has introduced Athiva Hotels & Resorts, a new premium lifestyle brand. The brand's initial portfolio includes six hotels with more than 900 keys. Athiva, which means "abundance" in Sanskrit, is centered on joy, wellness, and sustainability. (NDTV)

Quality Power Electrical Equipments Ltd has secured a major order valued at ₹13.90 cr for the supply of coil products. The order is classified as a single large order and will be executed within 12 months. (CNBC)

Economy

Indian seafood exports saw a strong rise in the first seven months of FY26. Shipments to the European Union, China, Vietnam, Russia, and the United Kingdom surged. This growth helped compensate for reduced exports to the United States. (ET)

FM Nirmala Sitharaman revealed that the recent adjustments to the Goods and Services Tax rates have effectively addressed the inverted duty challenges faced by various sectors. Now, essential goods are taxed at either zero or 5% GST. (ET)

International

Airbus engineers have found defects on a wider set of A320 fuselage panels as they prepare to inspect hundreds of jets for a flaw that the company's chief executive says is hurting deliveries. The total number of planes needing inspections for recently discovered quality problems on metal panels at the front of some planes was 628, including 168 already in service. (Invst)

Netflix's proposed acquisition of Warner Bros Discovery's studios and streaming unit is expected to reduce streaming costs for consumers by bundling Netflix and HBO Max, according to two people familiar with the proposal. Netflix said the potential combination of its streaming service with HBO Max would benefit consumers by lowering the cost. (Invst)

Top 5 Nifty Gainers	02-Dec	01-Dec	Var(%)
ASIANPAINT	2954	2868	3.0%
DRREDDY	1275	1260	1.2%
MARUTI	16239	16097	0.9%
BHARTIARTL	2104	2090	0.7%
HINDUNILVR	2478	2465	0.5%
Top 5 Nifty Losers	**02-Dec**	**01-Dec**	**Var(%)**
INDIGO	5698	5794	-1.7%
AXISBANK	1258	1276	-1.4%
RELIANCE	1546	1566	-1.3%
ICICIBANK	1373	1390	-1.2%
HDFCBANK	990	1002	-1.2%

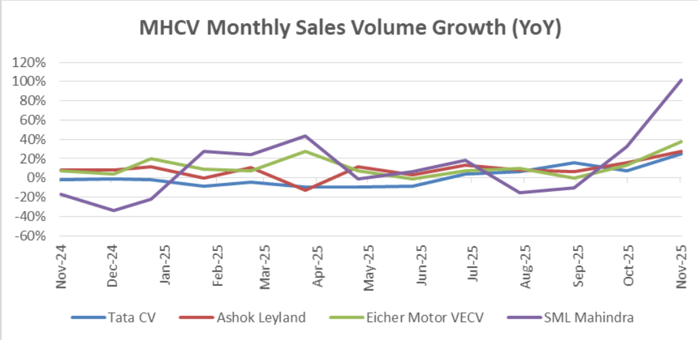
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	85138	-0.6%	0.7%	1.4%	5.3%
MIDCAP	47057	-0.1%	0.9%	-0.6%	0.2%
SMLCAP	51822	-0.5%	0.3%	-4.5%	-7.9%
AUTO	62286	0.1%	2.2%	3.9%	16.0%
BANKEX	66369	-0.7%	0.5%	1.6%	10.6%
Capital Goods	68980	-0.4%	0.6%	-2.2%	-4.0%
FMCG	20312	-0.2%	0.4%	-1.6%	-3.9%
Health Care	44575	-0.1%	0.6%	-1.0%	0.6%
IT	36365	-0.1%	1.8%	4.0%	-16.5%
METAL	34174	-0.4%	2.4%	-3.1%	9.4%
Oil & Gas	28082	-0.3%	-0.5%	-2.9%	3.4%
Power	6582	-0.4%	0.3%	-5.0%	-13.4%
Realty	6929	-0.2%	-1.0%	-7.9%	-15.9%

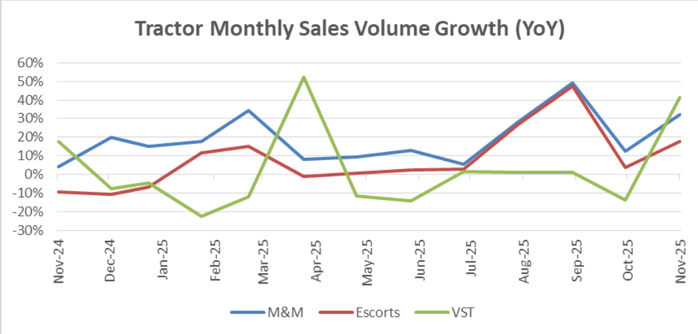
Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	112451	1%	0%	3%	19%
Fresh Exposure	2744	-17%	-17%	-36%	-47%
Exposure liquidated	2639	-2%	5%	-46%	-52%
Closing Net scripwise outstanding	112556	0%	-1%	4%	20%

NSE USD Futures	02-Dec	01-Dec	Var (%)
Dec Expiry (Rs./$)	88.75	88.75	0.0%
Jan Expiry (Rs./$)	88.43	88.43	0.0%
Total Turnover (Rs. Crore)	1977	2644	-25%

Sectors	TTM PE
Auto	32.29
Auto Ancillary	42.04
Banking	15.17
Engineering	37.55
Cement	64.18
Diamonds & Jewellery	46.93
Housing Finance	23.96
Infrastructure & Const	27.57
Metals-Aluminium	27.67
Metal – Steel	17.82
Oil Expl.	8.49
Pharma	11.15
Power – Gen. Supp.	40.19
Information Tech.	29.74
Sugar	17.5
Telecom Serv. Prov.	39.21
Tyres	33.78

MHCV & Tractor Monthly Sales Volume Growth (YoY) (Source:NBRR)





10 year G-Sec Yield	Current	Previous	Change
US	4.07%	4.09%	(1) bps
Japan	1.88%	1.87%	1 bps
India	6.49%	6.53%	(4) bps
UK	4.47%	4.48%	(1) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US$ in bn)	602	688	-12.5%
Inflation - WPI	0.13%	0.52%	(39) bps
Inflation - CPI	0.25%	1.44%	(119) bps

India GDP	Q3FY25	Q2FY25	Var (%)
Growth	8.20%	7.80%	40 bps

Monetary Policy	Current	Previous	Change
Repo Rate	5.50%	5.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	4.00%	(100) bps
O/S Banking System Liquidity (Rs bn)	2634	2377	257.5

IIP Growth %	Aug-25	Aug-24	Apr-Aug
IIP	0.4	3.7	3.4
Capital Goods	4.4	0.0	6.9
Mining	3.8	1.2	4.2
Manufacturing	4.1	-3.7	0.5
Electricity	6.0	-4.3	-2.5

ADR Price Movement									
Company	Price (US$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	17.41	6643047	17.45	5508412	-0.23%	1	1564.72	1561.00	0.2%
Wipro	2.73	3311717	2.72	4519779	0.37%	1	245.36	250.17	-1.9%
Dr.Reddy's	14.10	1010073	13.94	1067314	1.15%	1	1267.24	1275.20	-0.6%
ICICI Bank	30.60	4235630	30.58	6338856	0.07%	2	1375.09	1373.00	0.2%
HDFC Bank	35.84	3951528	35.44	8691208	1.13%	3	1073.71	989.80	8.5%

GDR's (US$)				
	Prices	Prev. Close	Change	Var %
L&T	45.65	45.55	0.1	0.2%
RIL	68.20	70.00	(1.8)	-2.6%
SBI	108.60	109.20	(0.6)	-0.5%

US Economy Data	Current	Previous
Inflation (%)(YoY)	3.00%	2.90%
Unemployment (%)	4.40%	4.30%

Interest Rate (%)	Current	Previous
Fed Rate	4.00%	4.25%

US GDP	Q2CY25	Q1CY25
Growth (QoQ Annualized)	3.80%	-0.60%

China Economy Data	Current	Previous
GDP	4.80%	5.20%
Inflation – CPI (%)	0.20%	-0.30%

Economic Calendar	Date
Indian GDP Data	27 Feb
Indian Inflation Data CPI	12 Dec
Indian Inflation Data WPI	15 Dec
Indian Monetary Policy	05 Dec
India's Industrial Production (IIP)	28 Dec
US Inflation Data	10 Dec
US GDP	23 Dec
US Unemployment Data	16 Dec
US Fed Rate	10 Dec
China GDP	To be Announced
China Inflation Data	10 Dec

Event Update		
Name	Date	Purpose
Engineers India Ltd.	04/12/25	Interim Dividend
Apis India Ltd.	05/12/25	Bonus issue
Computer Age Management Services Ltd.	05/12/25	Stock Split from Rs.10/- to Rs.2/-
Hindustan Unilever Ltd.	05/12/25	Spin Off
Sikko Industries Ltd.	08/12/25	Bonus issue
Mrs. Bectors Food Specialities Ltd.	12/12/25	Stock Split from Rs.10/-to Rs.2/-
VLS Finance Ltd.	12/12/25	Buy Back of Shares
Knowledge Marine & Engineering Works Ltd.	22/12/25	Stock Split from Rs.10/- to Rs.5/-

Bulk Deal As On 02/12/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
539773	ADVIKCA	FAIRPLAN DISTRIBUTORS PRIVATE LIMITED	B	3650000	1.34
531300	AMITINT	ARUN GUPTA	B	95069	3.94
526935	ARUNIS	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	S	375000	147.9
512301	CHMBBRW	NEO APEX VENTURE LLP	S	51357	26.23
512443	GANONPRO	JAIN CAPFIN PRIVATE LTD	B	50000	16.29
512443	GANONPRO	KAMLA BUSINESS VENTURES PRIVATE LIMITED	S	150000	15.51
512443	GANONPRO	NEERAJ KUMAR SINGLA	B	93193	16.21
524622	ISTRNETWK	ANIL SHRIPAL MAGDUM	S	111000	49.1
544524	JDCABLES	BONANZA PORTFOLIO LIMITED	S	3200	200.35
544524	JDCABLES	BONANZA PORTFOLIO LIMITED	B	201600	197.51
544524	JDCABLES	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	S	290400	197.5
544129	JUNIPER	NORGES BANK ON ACCOUNT OF THE GOVERNMENT PENSION FUND	S	2292010	239.01
544511	KARBON	BONANZA PORTFOLIO LIMITED	B	200000	189
544511	KARBON	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	S	250400	189
530547	KENFIN	SANTOSH KUMAR JAIN	S	20000	13.57
532397	KONNDOR	POURNIMA JAYVANT NICHITE	S	50000	20.26
532397	KONNDOR	RAGHAV BUSINESS CENTER PRIVATE LIMITED	B	50000	20.25
531328	KRETTOSYS	AKARSHIKA TRADERS LLP	B	3715234	1
537707	LADDU	ASHA DEVI	S	745375	1.04
537707	LADDU	ASHA DEVI	B	610000	1.04
537707	LADDU	SHAILESH DHAMELIYA	S	796836	1.05
543746	LOGICA	NIRAV SHETH -(HUF)	B	211800	225
540730	MEHAI	ANKITA VISHAL SHAH	S	14632509	1.73
540730	MEHAI	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	S	942772	1.79
540730	MEHAI	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	B	6200000	1.72
544553	MPKSTEELS	SHERWOOD SECURITIES PVT LTD	S	84800	141.37
544553	MPKSTEELS	SHERWOOD SECURITIES PVT LTD	B	92800	142.49
540386	ONTIC	DEEPAL PRAVINBHAI SHAH HUF	B	577242	2.21
540386	ONTIC	NISHIL SHAH	S	297595	2.25
540386	ONTIC	NISHIL SHAH	B	1500000	2.05
540386	ONTIC	SANJAYKUMAR SEVANTILAL SHAH	S	693716	2.25
540386	ONTIC	SHARE INDIA SECURITIES LIMITED	S	600000	2.15
540386	ONTIC	SHARE INDIA SECURITIES LIMITED	B	600000	2.25
540703	PROCLB	AMRIT NIRMAL CHAMARIA	S	129163	35.66
540703	PROCLB	NIRMALABEN SHANTILAL GADA	B	50000	35.66
511557	PROFINC	DEVI TRADERS LLP	S	3050000	14.55
511557	PROFINC	DEVI TRADERS LLP	B	3050000	14.56
511557	PROFINC	TATAD NAYAN GAUTAMBHAI	S	5575713	14.56
511557	PROFINC	TATAD NAYAN GAUTAMBHAI	B	4005501	14.56
536659	PVVINFRA	KTR CONSTRUCTIONS LLP	B	773794	4.99
531260	REFEXRENEW	GUTTIKONDA VARA LAKSHMI	B	32741	287.45
542145	RONI	SANDEEP VIJAYKUMAR LULLA	S	169200	51.73
512047	ROYALIND	PREMIER TRADING CORPORATION	S	1816113	7.56
544506	SHARVAYA	CRAFT EMERGING MARKET FUND PCC- CITADEL CAPITAL FUND	S	83400	187
544506	SHARVAYA	PARESH HARISHKUMAR THAKKER	B	145200	187.62
544047	SIYARAM	DWARKADHISH VENTURE PRIVATE LIMITED	S	181500	59.09
544047	SIYARAM	JOLLY WILSON	S	103500	59.45
544047	SIYARAM	JOLLY WILSON	B	114000	59.2
544621	SSMD	NEO APEX VENTURE LLP	B	200000	73
544621	SSMD	RADIANT GLOBAL FUND-CLASS B PARTICIPATING SHARES	B	200000	73
544621	SSMD	SHWETA AHUJA	S	83000	73
544621	SSMD	TGISME FUND	B	100000	76.65
539117	SUJALA	NIRAJ RAJNIKANT SHAH	B	28613	75.21
543745	SVS	VISHAL MAHESH WAGHELA	B	156000	12.62

530595	TELECANOR	SRI SURYANARAYANA RAJU VEGESNA	B	100000	26.47
543310	TIMESGREEN	ARYAMAN BROKING LIMITED	S	72000	87.1
543310	TIMESGREEN	NEO APEX VENTURE LLP	B	14000	85.74
543310	TIMESGREEN	PLUTUS CAPITAL MANAGEMENT LLP	B	100000	85.74
543310	TIMESGREEN	STATSOL RESEARCH LLP	S	32000	85.74

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
BAJAJHFL	Bajaj Housing Finance Ltd	BAJAJ FINANCE LIMITED	SELL	166600000	95.31
BESTAGRO	Best Agrolife Limited	NISHANT PITTI	BUY	214531	397.18
BESTAGRO	Best Agrolife Limited	WORTHY DISTRIBUTORS PRIVATE LIMITED	SELL	214520	397.17
EXCELSOFT	Excelsoft Technologies L	FINAVENUE GROWTH FUND	SELL	615968	105.01
GANGAFORGE	Ganga Forging Limited	MINERVA VENTURES FUND	SELL	758885	3.1
JUNIPER	Juniper Hotels Limited	NORGES BANK ON ACCOUNT OF THE GOVERNMENT PENSION FUND	SELL	2100000	239.02
MAGSON	Magson Retail And Dist L	KHODEEAR ENTERPRISE LLP LLP	BUY	50000	130.9
MAGSON	Magson Retail And Dist L	NIDHI MANISH PANCHOLI	SELL	134000	130.9
MPEL	Manas Polymer N Energie I	AVIRAT ENTERPRISE	SELL	78400	103.84
MOXSH	Moxsh Overseas Educon L	BRIJESH KUMAR SHARMA	SELL	48000	77.8
PRAMARA	Pramara Promotions Ltd	LE MERITE EXPORTS LIMITED	BUY	60000	349.5
PRAXIS	Praxis Home Retail Ltd	ELIMATH ADVISORS PRIVATE LIMITED	BUY	2830465	9.56
PRAXIS	Praxis Home Retail Ltd	MATHEW CYRIAC	SELL	2830465	9.56
RALLIS	Rallis India Ltd.	ASK INVESTMENT MANAGERS PVT LTD - PMS POOL ACCOUNT	BUY	1122800	266.73
VCL	Vaxtex Cotfab Limited	GOLDEN BIO ENERGY LIMITED	BUY	2480000	2
VCL	Vaxtex Cotfab Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	1752866	2
VCL	Vaxtex Cotfab Limited	NOVA GLOBAL OPPORTUNITIES FUND PCC - TOUCHSTONE	BUY	7500000	2
VCL	Vaxtex Cotfab Limited	QMIN INDUSTRIES LIMITED	SELL	20235000	2
VCL	Vaxtex Cotfab Limited	RAJVANSH ELECTRICALS PRIVATE LIMITED	BUY	990000	2
VCL	Vaxtex Cotfab Limited	STATSOL RESEARCH LLP	BUY	1000000	2
VCL	Vaxtex Cotfab Limited	ZEAL GLOBAL OPPORTUNITIES FUND	BUY	7500000	2

Disclosure:

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