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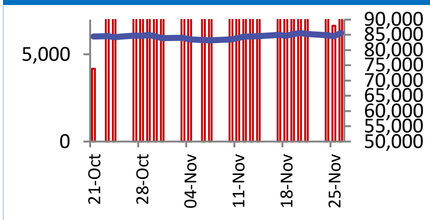
Daily Report

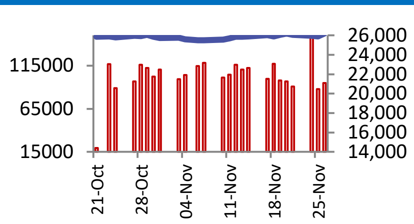
01st December, 2025

BSE



Open	85792
High	85970
Low	85578
Close	85707
Change	-14
Volume (Lacs)	6181
Turnover (Rs.inCr)	6809

NSE



Open	26237
High	26281
Low	26172
Close	26203
Change	-13
Volume(Lacs)	34808
Turnover(Rs.in Cr)	82568

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	47716	47427	289	0.61%
Dow Futures	47548	47743	(195)	-0.41%
Nasdaq	23366	23215	151	0.65%
FTSE	9721	9694	27	0.27%
Nikkei	49407	50254	(847)	-1.68%
Hang Seng	26040	25859	181	0.70%
Gift Nifty	26498	26387	111	0.42%
Straits Singapore	4533	4524	9	0.21%
South Korea	3918	3927	(8)	-0.22%
Taiwan	27536	27626	(90)	-0.33%
Shanghai	3899	3889	11	0.28%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper ($/MT)	11189	10940	250	2.3%
Alumin ($/MT)	2868	2829	40	1.4%
Zinc ($/MT)	3056	3015	41	1.3%
Brent Crude ($/bbl)	63	62	1	1.5%
Gold ($/Ounce)	4242	4239	3	0.1%
Silver ($/Ounce)	57	57	1	1.6%
Light Crude ($/bbl)	59	59	1	1.5%
N G ($/mmbtu)	5	5	(0)	-0.5%
Sugar ($/MT)	436	437	(1)	-0.2%
Rubber (Rs./kg)	186	185	1	0.5%
Baltic Dry Index	2560	2480	80	3.2%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./$ rate	89.46	89.31	0.17%
Rs./ Euro	103.49	103.39	0.09%
Rs./Chinese Yuan	12.65	12.65	0.00%
Yen /$ rate	155.57	156.18	-0.39%
$ US/Euro	1.16	1.16	-0.03%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.45	99.46	-0.01%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	26270	59500
Support 2	26200	59300
Resistance	26520	60400

Securities in Ban For Trade
SAMMAANCAP

Market Review

US: The Nasdaq Composite rose on Friday, scoring its fifth straight day of gains even as it recorded a losing month.

Asia: Asia-Pacific markets opened December mostly in the red Monday as traders parsed fresh manufacturing data from China and rising expectations of a U.S. Federal Reserve rate cut this month.

India: The Indian market closed flat with a slight negative bias on Friday, with the Sensex and the Nifty swinging between red and green as investors booked profits near record levels and assessed expectations of potential interest rate cuts in both the U.S. and India, alongside incoming domestic growth signals.

Nifty is expected to open on a gap up note and likely to witness positive move during the day.

Global economy:

China's factory activity in November contracted slightly as production growth came to a halt and new orders slowed. The RatingDog China General Manufacturing PMI, compiled by S&P Global, dropped to 49.9 in November from 50.6 in October, missing analysts' expectations of 50.5 in a Reuters poll. The 50-mark separates growth from contraction.

Japan's manufacturing activity shrank for the fifth consecutive month in November, weighed by sluggish demand, though the outlook improved slightly. The S&P Global Japan Manufacturing PMI slightly improved to 48.7 in November from 48.2 in October, roughly in line with the flash reading of 48.8. The rate of decline was the slowest since August. PMI readings above 50.0 indicate growth, while those below show contraction.

Australian home prices jumped in November but gains in Sydney and Melbourne slowed, as expectations there would be no interest rate cuts anytime soon undermined sentiment in those already expensive markets. Home prices nationwide increased 1% in November from October to a median value of A$888,941 ($581,990), slightly slower than the 1.1% gain the previous month, according to figures from Cotality, formerly CoreLogic. Prices have risen 7.5% this year.

Commodities:

Oil prices rose more than 1.5% on Monday after the OPEC+ meeting on Sunday decided against earlier planned production rises in the first quarter of next year.

Gold edged lower in early Asian trade on Monday from a near three-week peak, as investors booked profits amid increasing bets of a U.S. interest rate cut later this month, while silver hit a record high.

Currency:

The dollar began December on the back foot, as investors braced for a pivotal month that could bring the Federal Reserve's final rate cut of the year and the confirmation of a dovish successor to Chair Jerome Powell.

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	8100	1623	8433	1674	(51)	139936	27767	138787	27541	1149	226
Index Option	5731753	1123395	5704176	1118291	5104	2104425	414797	1832097	361411	272328	53386
Stock Future	187918	13129	190277	13477	(348)	5779030	394475	5771935	394454	7095	21
Stock Option	182949	13464	187793	13793	(329)	240015	16336	207111	14078	32904	2258
Total	**6110720**	**1151611**	**6090679**	**1147235**	**4376**	**8263406**	**853375**	**7949930**	**797484**	**313476**	**55891**

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
21-Nov-25	22237	14498	7739
24-Nov-25	56721	60572	(3851)
25-Nov-25	16728	15753	975
26-Nov-25	17172	12152	5021
27-Nov-25	11233	11736	(504)
Month to date- Nov	**342897**	**329719**	**13178**
FII (Prov.) (Rs Cr)	**Buy**	**Sell**	**Net**
24-Nov-25	54505	58677	(4172)
25-Nov-25	16596	15811	785
26-Nov-25	16232	11454	4778
27-Nov-25	10262	11517	(1255)
28-Nov-25	10175	13970	(3796)
Month to date-Nov	**307574**	**325074**	**(17500)**
DII (Prov.) (Rs. Cr)	**Buy**	**Sell**	**Net**
24-Nov-25	20445	15933	4513
25-Nov-25	15153	11241	3912
26-Nov-25	16334	10086	6248
27-Nov-25	15559	11618	3941
28-Nov-25	14627	10479	4148
Month to date-Nov	**318137**	**241053**	**77084**
FII Debt - BBG (Rs. Cr)	**Buy**	**Sell**	**Net**
21-Nov-25	2430	3774	(1344)
24-Nov-25	2027	2974	(946)
25-Nov-25	1352	2648	(1296)
26-Nov-25	3128	2345	782
27-Nov-25	1117	941	176
Month to date- Nov	**40029**	**39336**	**693**

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2019	47%	1553	47%
Decline	2128	49%	1672	50%
Unchanged	172	4%	107	3%

Market Turnover	28-Nov	27-Nov	Var (%)
BSE Cash	6809	8141	-16%
NSE Cash	82568	84815	-3%
NSE Futures	67914	88987	-24%
NSE Options	16420913	12398288	32%
Total (Rs.Cr)	16578205	12580231	32%

Volatility Index	28-Nov	27-Nov
Volatility Index	11.62	11.79

Index PE - TTM	28-Nov	Yr. High	Yr. Low
Sensex	23.4	24.1	20.3
Nifty	22.8	23.0	19.6

Corporate News

Sterling & Wilson Renewable Energy Limited has received Rs. 31.42 c from Mr. Khurshed Yazdi Daruvala as part of a total indemnity claim of Rs. 174.54 cr. The company is still awaiting Rs. 143.12 cr from Shapoorji Pallonji and Company Private Limited (SPCPL), due by January 31, 2026. (CNBC)

Refex Industries Ltd has secured a significant domestic contract worth ₹32.89 cr for transporting pond ash to National Highways Authority of India (NHAI) road development projects. The work is expected to be finished within five months. (CNBC)

Quick Heal Technologies has entered into contract with (NFSU Research and Innovation Council (NFSU is an Institution of National Importance under Ministry of Home Affairs), for implementation of the integrated cyber security solutions. The contract valued at Rs 64.25 cr is valid for a period of five years. (NDTV)

Marsons has received a purchase order worth Rs 13.46 cr (Including GST) from LC Infra Projects. The order is for the supply of Inverter Duty Transformers which includes, 11 nos. of 13.2 MV A 33/4x0.66 kV transformers, The order is to be executed within 6 months. (CNBC)

Economy

India achieved a historic milestone in 2025, producing 357 mn tonnes of foodgrains. This marks a significant increase of 100 mn tonnes over the past decade. Prime Minister Narendra Modi highlighted this achievement during his Mann Ki Baat address. (ET)

The Asian Development Bank has approved an $846 mn loan to India to modernize 650 Industrial Training Institutes and five National Skill Training Institutes. This initiative aims to create a future-ready workforce for manufacturing and emerging technology sectors, boosting employability for 1.3 mn Indian youth with industry-aligned and green skills training. (ET)

International

Six thousand Black Angus cattle chew on rolled barley, silage, cottonseed and molasses, fattening up in three rows of shaded pens under the hot Australian sun. After an average of 90 days at the Gundamain feedlot, their weight can increase as much as 50% to around 600 kg (1,323 lb), all to meet rising global demand for juicy grain-fed beef. (Invst)

Norway's $2 trn wealth fund it would vote for a shareholder proposal at Microsoft's annual general meeting. The world's largest sovereign wealth fund owned a 1.35% stake worth $50 bn in Microsoft, according to fund data, its second-largest equity holding overall, after Nvidia. (Invst)

Top 5 Nifty Gainers	28-Nov	27-Nov	Var(%)
M&M	3757	3681	2.1%
SUNPHARMA	1832	1810	1.2%
ADANIENT	2280	2255	1.1%
EICHERMOT	7054	6999	0.8%
DRREDDY	1259	1249	0.8%
Top 5 Nifty Losers	**28-Nov**	**27-Nov**	**Var(%)**
SBILIFE	1966	2005	-1.9%
SHRIRAMFIN	852	868	-1.8%
HDFCLIFE	764	778	-1.7%
POWERGRID	270	274	-1.4%
ETERNAL	300	303	-0.9%

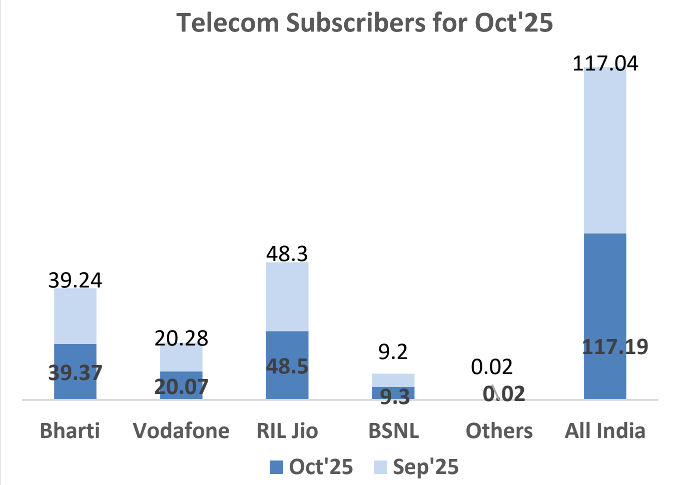
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	85707	0.0%	0.6%	2.1%	7.4%
MIDCAP	47211	0.0%	1.2%	0.4%	2.5%
SMLCAP	52054	-0.1%	0.1%	-3.4%	-5.7%
AUTO	61750	0.6%	0.8%	3.1%	16.7%
BANKEX	66946	0.1%	1.2%	3.1%	12.9%
Capital Goods	69209	-0.2%	-0.2%	-1.7%	-2.1%
FMCG	20407	0.2%	0.1%	-1.2%	-3.8%
Health Care	44884	0.4%	1.1%	0.8%	2.8%
IT	36306	-0.1%	1.2%	3.7%	-15.1%
METAL	34112	0.2%	1.5%	-2.9%	11.7%
Oil & Gas	28207	-1.0%	-1.5%	-1.5%	5.2%
Power	6613	-0.6%	-0.6%	-4.5%	-11.7%
Realty	7015	-0.2%	-0.3%	-4.7%	-11.9%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	111852	-1%	0%	3%	19%
Fresh Exposure	3304	23%	-10%	-27%	-36%
Exposure liquidated	2705	-26%	-22%	-27%	-51%
Closing Net scripwise outstanding	112451	1%	0%	3%	20%

NSE USD Futures	28-Nov	27-Nov	Var (%)
Nov Expiry (Rs./$)	89.99	89.99	0.0%
Dec Expiry (Rs./$)	88.75	88.75	0.0%
Total Turnover (Rs. Crore)	6706	2406	179%

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

Telecom Subscribers for Oct'25 (Source:TRAI,NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	4.04%	4.01%	2 bps
Japan	1.85%	1.81%	4 bps
India	6.51%	6.46%	4 bps
UK	4.44%	4.45%	(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)	1145	1012	132.7

IIP Growth %	Aug-25	Aug-24	Apr-Aug
IIP	4.0	3.2	3.5
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	17.48	3688870	17.42	8260063	0.34%	1	1563.72	1560.10	0.2%
Wipro	2.72	4205031	2.69	9815961	1.12%	1	243.32	249.53	-2.5%
Dr.Reddy's	14.05	771056	13.99	1017698	0.43%	1	1256.88	1258.80	-0.2%
ICICI Bank	31.23	2746981	31.01	3759285	0.71%	2	1396.88	1388.80	0.6%
HDFC Bank	36.82	1572858	36.63	2228081	0.52%	3	1097.94	1007.60	9.0%

GDR's (US$)				
	Prices	Prev. Close	Change	Var %
L&T	45.60	45.70	(0.1)	-0.2%
RIL	70.60	69.70	0.9	1.3%
SBI	109.80	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)	01 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
Mini Diamonds (India) Ltd.	02/12/25	Stock Split from Rs.10/- to Rs.2/-
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 28/11/25

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
517356	ACIIN	PUJYA GURUWAR TEXTILE INDIA PRIVATE LIMITED	S	1250000	1.52
531300	AMITINT	CHETANSURESHSONAWANE	B	190000	3.89
531300	AMITINT	KAVITA MAYANK VARIA	S	200000	3.89
539288	AVI	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	40000	32.94
539288	AVI	SAGAR BASAK	S	42043	32.94
539175	BLUEGOD	SHALENI BBISWAS VENTURES LLP	B	4100000	3.13
540829	CHANDRIMA	GREEN PEAKS ENTERPRISES LLP	S	2051500	13.93
540829	CHANDRIMA	GREEN PEAKS ENTERPRISES LLP	B	1851001	13.93
540829	CHANDRIMA	PRAS INVESTMENT PRIVATE LIMITED	B	2774820	13.93
543619	CNCRD	GAURAV LATH	S	62000	2433.51
543619	CNCRD	NITIN JAIN	S	62000	2425.16
531909	CROISSANCE	GAURI NANDAN TRADERS	S	225852	3.85
531909	CROISSANCE	GAURI NANDAN TRADERS	B	841906	3.9
531909	CROISSANCE	HEMANT BAHRI	S	1100000	3.93
531909	CROISSANCE	SUNAYANA INVESTMENT COMPANY LIMITED	S	500	3.8
531909	CROISSANCE	SUNAYANA INVESTMENT COMPANY LIMITED	B	450500	3.99
544331	DAVIN	KHUSHBOO HARIT PATEL	S	50000	46.98
539559	DDIL	INDIA FAST FORWARD ADVISORY SERVICES PRIVATE LIMITED	S	1609366	8.78
539559	DDIL	NIMIT JAYENDRA SHAH	S	800000	8.79
543500	EVOQ	NIRAJ RAJNIKANT SHAH	S	144000	3.05
541627	GUJWIND	RAJNISH RATHI	B	60000	7.92
541627	GUJWIND	SNEHA SANJEEV LUNKAD	S	50812	7.92
508918	IRONWOOD	BELA NAISHADH DESAI	S	100000	52.6
508918	IRONWOOD	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	B	141090	52.4
508918	IRONWOOD	VALUE LINE ADVISORS PRIVATE LIMITED	S	108743	52.6
501311	JAYBHCR	MAHENDRA GIRDHARILAL WADHWANI	S	28445	24.71
544013	KKSHL	10X FINWIN ADVISORS PRIVATE LIMITED	B	51000	40
544013	KKSHL	SHRENI SHARES LTD	S	51000	40
530119	NATRAJPR	SUSHILA VIJAYKUMAR	B	20000	37.28
530119	NATRAJPR	THYAGARAJANGURUMURTHY	S	20000	37.28
543798	PATRON	RAJARAMCHOUDHARY	B	140000	2.99
543798	PATRON	SNEH HIRJI GADA	S	208000	3.06
500143	PHCAP	RELITRADE STOCK BROKING PVT LTD	S	15050	191.77
530095	PRADHIN	SHARE INDIA SECURITIES LIMITED	S	5389182	0.25
530095	PRADHIN	SHARE INDIA SECURITIES LIMITED	B	7810606	0.25
506852	PRIMO	FLOWTECH INDUSTRIAL PROJECTS PVT. LTD.	B	2525000	25.6
506852	PRIMO	NAVEEN CHOPRA	S	2500000	25.6
511557	PROFINC	DILIP RAMANLAL DOSHI	S	1550282	12.9
511557	PROFINC	DILIP RAMANLAL DOSHI	B	1550282	12.4
511557	PROFINC	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	2217070	12.23
511557	PROFINC	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	2217070	12.27
511557	PROFINC	NAVRATRI SHARE TRADING PRIVATE LIMITED .	B	3000000	12.34
511557	PROFINC	SANDEEP GORAKH GIRASE	B	2144000	12.12
540159	PURPLE	SNEHA SANJEEV LUNKAD	B	83500	5.39
541601	RAJNISH	BLUE BELL FINANCE LTD	S	9087781	0.72
520008	RICOAUTO	IRAGE BROKING SERVICES LLP	S	1626503	118.66
520008	RICOAUTO	IRAGE BROKING SERVICES LLP	B	1433326	118.51
544428	SEVL	GREEN PEAKS ENTERPRISES LLP	S	84000	63.79
544428	SEVL	GREEN PEAKS ENTERPRISES LLP	B	87600	64.07
539593	SHIVA	KALINDI GARG	B	34171	9.16
539593	SHIVA	SNEHA SANJEEV LUNKAD	S	90000	9.16
544607	SHTL	RCSPL SHARE BROKING PRIVATE LIMITED	S	33600	63.18
516108	STHINPA	FORTUNE PACKAGING LLP	B	120000	85.75
539117	SUJALA	NIRAJ RAJNIKANT SHAH	S	62707	78.81

531499	SYBLY	SOMANI VENTURES AND INNOVATIONS LIMITED	B	64645	2.06
532159	TRESCON	MINAL PRAKASH DESHPANDE	S	450000	7.37
531411	TUNITEX	NIRAJ RAJNIKANT SHAH	B	1702954	1.48
544464	UML	COMELY ELECTRICAL PRIVATE LIMITED	S	88000	69.95

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
BAIDFIN-RE	Baid Finserv Limited	CHANDRA G SANKLECHA	SELL	191788	0.17
BAIDFIN-RE	Baid Finserv Limited	PERMILA DEVI	BUY	166721	0.16
FRESHARA	Freshara Agro Exports Ltd	RITU BAPNA	BUY	128400	155.74
MCLOUD	Magellanic Cloud Limited	VIRTUE FINANCIAL SERVICES PRIVATE LIMITED	SELL	4000000	29.93
MANGALAM	Mangalam Drugs And Orgar	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	SELL	88323	27.93
NIDAN	Nidan Labs and Health Ltd	VAGHANI VIRAJ	BUY	80000	21.98
PRAMARA	Pramara Promotions Ltd	ROHIT NANDKISHORE LAMBA	SELL	76000	350.83
SAWALIYA	Sawaliya Food Products L	BEACON STONE CAPITAL VCC - BEACON STONE I	SELL	124800	280
SAWALIYA	Sawaliya Food Products L	ORICON ENTERPRISES LIMITED	BUY	49800	280.11
SHIVASHRIT	Shivashrit Foods Limited	NECTA BLOOM VCC - REGAL FUND	SELL	106000	131.82
TAURIAN	Taurian MPS Limited	PRADEEP KUMAR MACHINGAL GOVINDAN	BUY	46400	242.94
VCL	Vaxtex Cotfab Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	952866	1.82
YATHARTH	Yatharth Hosp & Tra C S L	CARNELIAN ASSET MANAGEMENT & ADVISORS PRIVATE LIMITED	BUY	550323	721.89
YATHARTH	Yatharth Hosp & Tra C S L	KOTAK MAHINDRA MUTUAL FUND	BUY	800000	719.37
YATHARTH	Yatharth Hosp & Tra C S L	NEENA TYAGI	SELL	5633800	716.98

Disclosure:

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