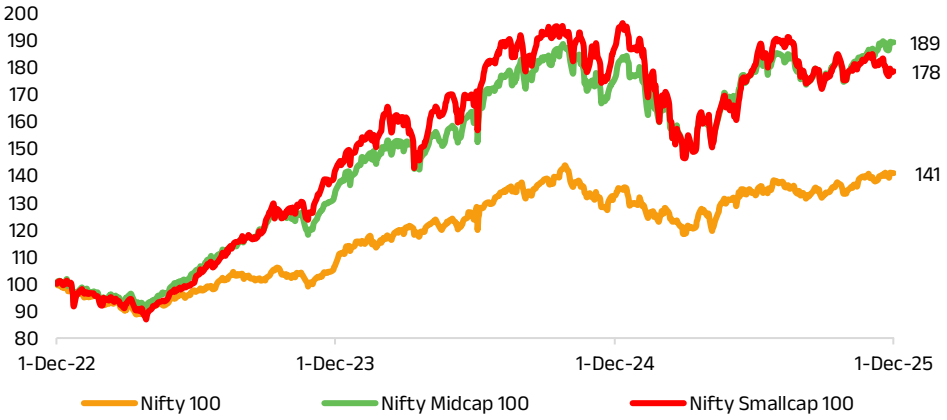


Broad Indices Historical Movement



Source: NSE

Broad Indices

	1-Dec-25	1 Day	1 Week	1 Month
Nifty 50	26,175.75	-0.10%	0.83%	1.76%
Nifty 100	26,719.75	-0.07%	0.99%	1.33%
Nifty 200	14,571.35	-0.05%	1.10%	1.46%
Nifty 500	23,922.45	-0.04%	1.05%	0.89%
Nifty Large Midcap 250	16,900.70	-0.09%	1.16%	1.40%
Nifty Midcap 150	22,372.30	-0.10%	1.33%	1.48%
Nifty Next 50	69,220.60	0.12%	1.80%	-0.87%
Nifty Smallcap 250	16,770.60	0.23%	0.93%	-3.14%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Smart Beta Index

Index	1-Dec-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	32,128.50	-0.05%	1.54%	2.18%
NIFTY 500 Value 50	15,019.45	0.27%	1.34%	-0.79%
Nifty 200 Quality 30	21,381.90	0.23%	1.05%	1.38%
Nifty 50 Equal Weight	33,203.00	-0.04%	0.77%	1.02%
NIFTY Alpha Low Volatility 30	27,008.30	0.00%	0.90%	0.80%
Nifty High Beta 50	3,958.20	-0.09%	1.96%	0.17%
Nifty Low Volatility 50	25,659.95	-0.07%	0.62%	1.06%
Nifty Midcap150 Momentum 50	63,500.45	-0.15%	1.30%	2.57%
Nifty PSE	9,758.65	0.15%	0.33%	-3.02%
Nifty SME Emerge	15,248.10	-0.37%	1.03%	-1.57%
Nifty 100 ESG	5,179.35	0.03%	1.01%	2.29%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Sector Indices

Index	1-Dec-25	1 Day	1 Week	1 Month
Nifty Auto	27,993.00	0.79%	2.01%	4.41%
Nifty Bank	59,681.35	-0.12%	1.44%	3.30%
Nifty Consumption	12,462.45	-0.08%	0.32%	0.38%
Nifty Financial	27,814.50	-0.27%	1.15%	2.49%
Nifty FMCG	55,500.50	-0.17%	0.66%	-1.26%
Nifty Healthcare	14,885.45	-0.97%	0.95%	1.31%
Nifty IT	37,549.70	0.39%	1.38%	5.14%
Nifty Media	1,464.80	-0.23%	1.97%	-4.78%
Nifty Metal	10,353.20	0.58%	3.35%	-2.44%
Nifty MNC	30,502.10	0.36%	1.96%	0.98%
Nifty Pharma	22,887.75	-0.48%	1.76%	3.21%
Nifty Realty	893.90	-1.02%	0.78%	-5.66%
Nifty Energy	35,539.25	-0.03%	0.31%	-2.03%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Nifty 50 Top 5 Gainers

Company	1-Dec-25	Prev_Day	% Change	1 Week
Tata Motors	363.80	356.80	1.96	1.54
Hero Moto	6,295.50	6,174.50	1.96	5.24
Maruti	16,097.00	15,900.00	1.24	0.87
HCL Tech	1,642.90	1,624.20	1.15	2.02
Kotak Bank	2,147.60	2,124.40	1.09	2.89

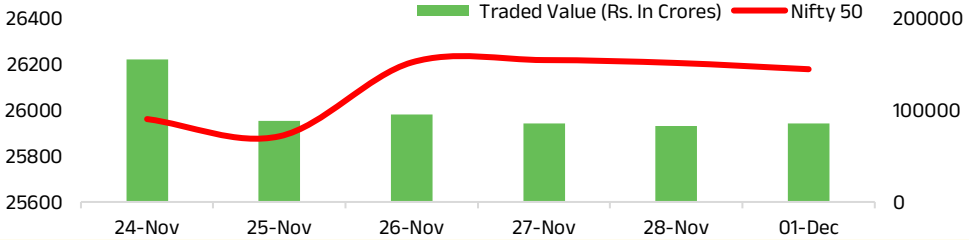
Source: NSE

Nifty 50 Top 5 Losers

Company	1-Dec-25	Prev_Day	% Change	1 Week
BPCL	354.00	359	-1.42	-1.57
IndusInd Bank	847.15	859	-1.33	1.33
Sun Pharma	1,807.40	1832	-1.32	1.49
United Phos	750.85	759	-1.03	1.10
Divi's Lab	6,422.50	6477	-0.84	1.00

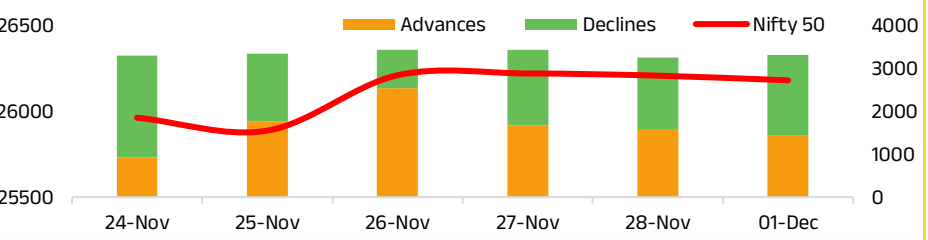
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

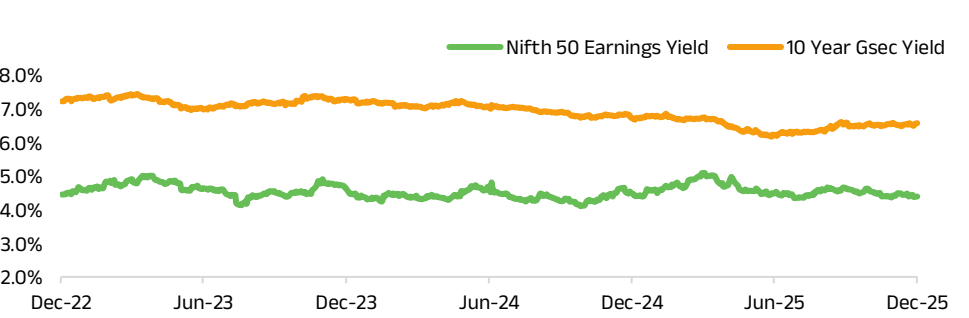
Indian equity markets gave up early gains to end slightly lower. Markets opened on a positive note after data showed the Indian economy grew at the fastest pace in six quarters during the three months to September 2025, defying expectations of a modest slowdown. However, early gains faded as the rupee hit a new record low amid foreign outflows.

Godrej Properties has emerged as the highest bidder for a 5-acre land parcel in Hyderabad's Kokapet, where it plans to develop a premium residential project with an estimated revenue potential of Rs. 4,150 crore.

Sun Pharmaceutical Industries, a global specialty pharmaceutical leader, announced on Monday the strategic launch of its innovative drug Ilumya (Tildrakizumab) in India, indicated for the treatment of moderate-to-severe plaque psoriasis.

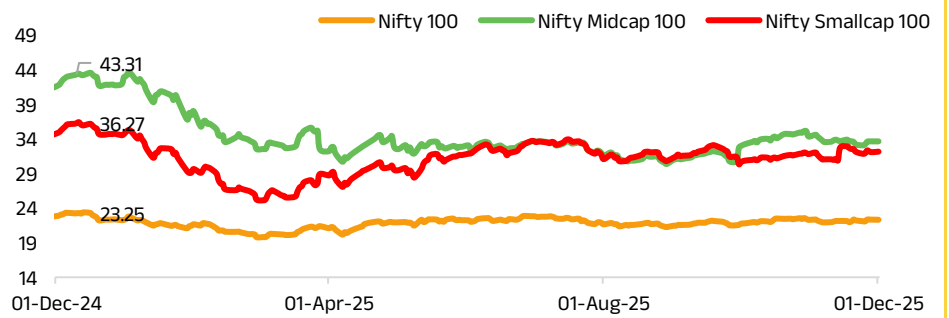
India's biggest carmakers, including Tata Motors and Hyundai, have urged the government to scrap the weight-based emission concession for small cars under the proposed new efficiency rules, arguing that the move would benefit only one company.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



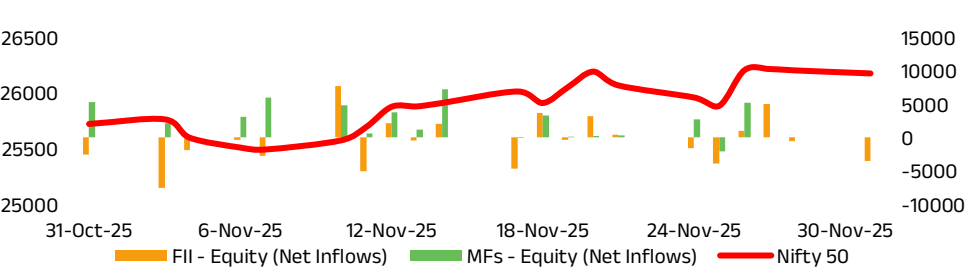
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	YTD
FII	-3489.27	-3,489	7,356	-1,47,162
MF**	5208.87		58,892	4,53,955
DII	2558.93	2,559	1,33,044	7,02,630

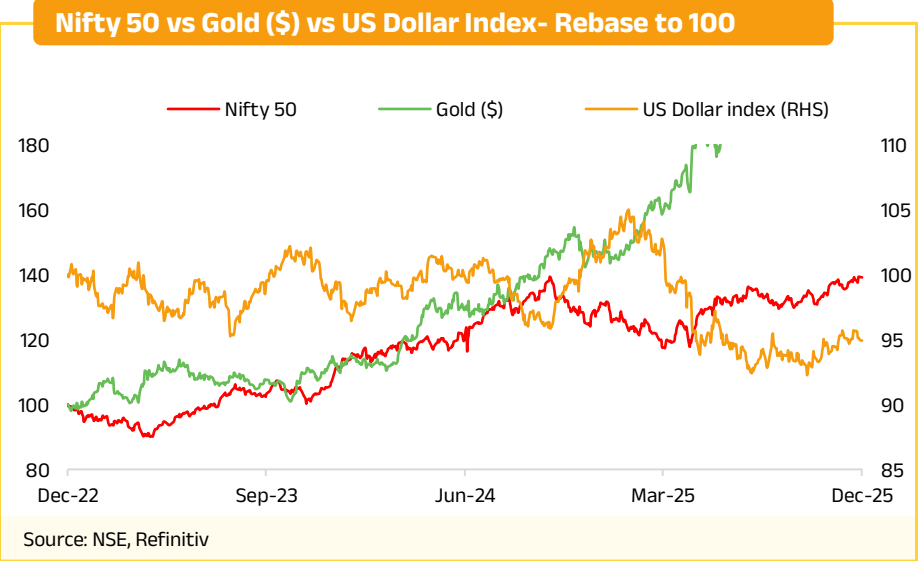
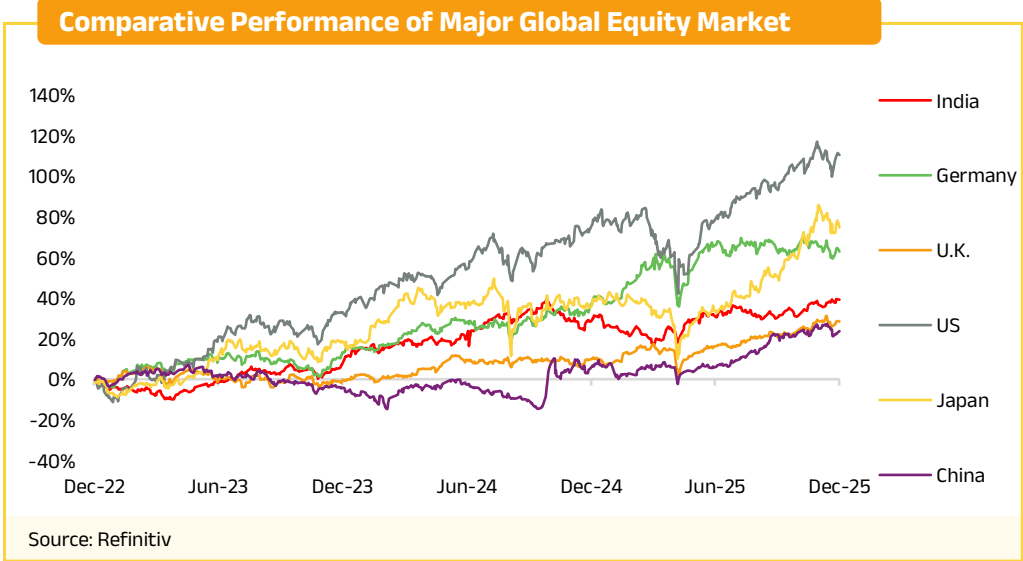
Source: SEBI, NSDL;**As on 26th Nov 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	26334.70	26387.40	-0.20%
Near Basis	158.95	184.45	-13.82%
Mid Futures	26503.10	26550.10	-0.18%
Mid Basis	327.35	347.15	-5.70%
Near Open Interest (Cr.)	1.41	1.36	3.36%
Mid Open Interest (Cr.)	0.09	0.09	1.16%
Rollover (%)	7.30	7.22	1.02%
Put Call Ratio (OI)	1.14	1.16	-1.43%
Put Call Ratio(Vol)	1.03	0.97	6.63%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	1645	1696	27804
Index Options	1212724	1208643	445929
Stock Futures	13129	13477	394475
Stock Options	13464	13793	16336
Total	1240963	1237609	884544
Source: NSE			

Global Equity Market				
Global Indices	1-Dec-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3716.83	-0.54%	1.70%	-0.41%
Nasdaq 100 (U.S.)	25342.85	-0.36%	1.89%	-1.99%
FTSE (U.K.)	9702.53	-0.18%	1.76%	-0.15%
DAX Index (Germany)	23589.44	-1.04%	1.51%	-1.54%
CAC 40 Index (France)	8097.00	-0.32%	1.73%	-0.30%
SSE Composite (China)	3914.01	0.65%	2.01%	-1.03%
Nikkei (Japan)	49303.28	-1.89%	1.39%	-5.93%
Kospi (South Korea)	3920.37	-0.16%	1.93%	-4.56%
HangSeng (Hong Kong)	26033.26	0.67%	1.23%	0.49%
Strait Times (Singapore)	4526.22	0.05%	0.66%	2.20%
Ibovespa Sao Paulo (Brazil)	158611.01	-0.29%	2.15%	6.07%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8565.20	-0.57%	0.47%	-3.57%
Jakarta Composite (Indonesia)	8548.79	0.47%	-0.25%	4.71%
KLSE (Malaysia)	1624.57	1.25%	0.36%	0.96%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	1-Dec-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,28,121	1.66%	4.35%	6.37%
Gold (\$/oz)	4,232.45	0.05%	2.25%	5.76%
Silver (INR/1 kg)	1,73,503	5.76%	13.23%	16.68%
Silver (\$/oz)	57.96	2.81%	12.77%	19.14%
Brent Crude(\$/bbl)	64.83	-0.31%	2.32%	-1.14%
Crude Oil (INR/1 bbl)	5,238.00	0.06%	1.91%	-2.40%
NYMEX Crude(\$/bbl)	59.37	1.52%	0.61%	-3.70%
Natural Gas (INR/1 mmbtu)	433.90	6.64%	6.22%	23.79%
Aluminium (INR/1 kg)	275.00	1.10%	2.84%	1.59%
Copper (INR/1 kg)	1,043.00	1.61%	3.65%	3.42%
Nickel (INR/1 kg)	1,338.00	0.29%	2.06%	-0.38%
Lead (INR/1 kg)	185.90	-0.13%	0.49%	0.95%
Zinc (INR/1 kg)	316.50	1.59%	1.52%	2.76%
Mentha Oil (INR/1 kg)	1,012.50	0.11%	-0.32%	0.84%
Baltic Dry Index	2,583	0.90%	12.55%	31.38%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Penny Stocks

Definition: Penny stocks are low-priced shares of small companies, often trading below \$5 per share.



Explanation

They are highly speculative and carry significant risk due to low liquidity and limited financial transparency. Investors are attracted by the potential for large gains, but losses can be equally severe. Common in emerging businesses or distressed companies. Suitable only for experienced investors with high risk tolerance.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.21	5.35	6.01	13.87
Flexi Cap Fund	0.62	5.20	3.42	15.57
Mid Cap Fund	0.51	6.14	3.93	20.90
Large & Mid Cap Fund	0.69	5.50	4.73	17.59
Small Cap Fund	-1.68	2.68	-2.94	18.73
Multi Cap Fund	0.23	4.88	2.98	18.01
Focused Fund	0.73	5.01	4.16	15.09
Value Fund	0.85	5.05	3.20	17.98
Contra Fund	1.15	5.75	4.08	19.23
ELSS	0.48	4.60	3.42	16.28
Equity Savings	0.68	3.87	6.49	9.70
Arbitrage Fund	0.56	2.83	6.21	6.88
Dividend Yield Fund	0.45	4.82	2.82	18.25
Aggressive Hybrid Fund	0.60	4.33	5.28	13.71
Balanced Advantage	0.75	3.89	5.25	11.46
Source: MFI 360 Explorer; Less than 1 year returns are absolute and greater than 1 year returns are CAGR. Category wise parent schemes are selected, which are available for investment to calculate average returns.				