

Indices	Current Value	% 1 D	% YTD
Sensex	85,525	-0.0	9.5
Nifty	26,177	0.0	10.7
BSE Midcap	46,979	0.1	1.2
BSE Small cap	51,567	0.4	-6.5

Sectors – Performance (BSE)

Metal	35,486	0.5	22.8
FMCG	20,310	0.5	-2.2
Power	6,515	0.4	-6.5
Tech	18,981	-0.8	-2.5
IT	37,923	-0.7	-12.2
Healthcare	44,168	-0.2	-2.4

Nifty Gainers/Losers	CMP	% Chg
COALINDIA	400	3.7
SHRIRAMFIN	958	2.5
ULTRACEMCO	11,678	1.3
INFY	1,668	(1.3)
BHARTIARTL	2,123	(1.2)
ADANIPTS	1,494	(1.0)

FII Trading activities in Cash

	Date	Net	MTD
FII	23-Dec-25	-1,755	-2,271
DII	23-Dec-25	3,720	7,619

Figs. in Rs Cr.

Global Indices	Current Value	% 1 D	% YTD
Dow Jones	48,442	0.2	13.9
Nasdaq	23,562	0.6	22.0
DAX	24,340	0.2	22.3
Nikkei 225	50,637	0.4	26.9
FTSE 100	9,889	0.2	21.0
Hang Seng	25,774	(0.1)	28.5
Shanghai	3,920	0.1	17.0

Forex Rate

INR/USD	89.7	-0.0	-4.5
INR/EUR	105.8	-0.6	-15.7
INR/GBP	121.2	-0.7	-11.3
INR/YEN (100)	57.5	-0.9	-4.9

Source: Bloomberg

Market Commentary

- **Asian markets** are trading slightly higher, as upbeat U.S. growth data and firm commodity prices lifted year-end sentiment. The Nikkei, Hang Seng, and Shanghai are trading higher by 0.29%, 0.15%, and 0.07%, respectively.
- **Indian indices** are expected to open on a positive note. GIFT Nifty was trading at 26,230 compared to yesterday's Nifty Futures close of 26,207.
- **U.S. markets** ended on a positive note, supported by strong economic momentum as robust GDP growth of 4.3% lifted growth-oriented and technology stocks. Dow Jones ended higher by 79 points or 0.16% to close at 48,442, and NASDAQ ended higher by 133 points or 0.57% to close at 23,561.

News in Focus

- **Vikran Engineering:** The company received a Rs 2,035 Cr order from Onix Renewables for EPC works for solar plant development.
- **GAIL:** The company signed an MoU with the Government of Chhattisgarh to develop a Gas-based fertiliser project. It will undertake techno-economic studies for setting up a urea manufacturing plant with a capacity of 12.7 Lc MT.
- **ITC:** The company has not increased cigarette MRPs, and therefore, there is no scope for traders to raise prices, a report said.
- **Reliance Communications:** The Central Bank of India declared the loan accounts of its arm, Reliance Telecom, as 'fraud'.
- **Spandana Sphoorty Financial:** The board allotted 41,500 NCDs to raise funds worth Rs 415 Cr on a private placement basis.
- **Thirumalai Chemicals:** The board approved the allotment of 18,96,614 shares to raise funds worth Rs 56.1 Cr.
- **Bank of India:** The bank issued long-term bonds to raise funds worth Rs 10,000 Cr. The issue includes a base of Rs 5,000 Cr and a green shoe option of Rs 5,000 Cr on a private placement basis.
- **Arisinfra Solutions:** The company received an asphalt order worth Rs 35 Cr from Goswami Infra Projects.
- **Supreme Petrochem:** The company clarified that the reports of a temporary shutdown of the entire Amdoshi plant are incorrect, stating that only the newly commissioned mABS plant has been temporarily shut due to an equipment malfunction, while the rest of the facility remains fully operational.
- **Laurus Labs:** The company invested Rs 49 Cr in JV KRKA Pharma to acquire 4.9 Cr shares.
- **Ultramarine & Pigments:** Thirumalai Chemicals allotted 15.2 Lc shares at Rs 296 per share on a preferential basis.
- **Bliss GVS Pharma:** The board appointed SN Kamath as Managing Director for three years. Kamath is currently the company's CEO.
- **Finolex Cables:** The company received a tax demand of Rs 22 Cr, including a penalty from the Chandigarh tax body.
- **Coal India:** The board gave in principle approval for the listing of its arm, South Eastern Coalfields.

Axis Intellect: Intraweek Stocks for the week 22nd Dec 2025 to 29th Dec 2025

Name of Stock	Mcap	Sector
HINDUSTAN AERONAUTICS LIMITED	Large Cap	Industrials
UNION BANK OF INDIA	Large Cap	Banks
FORTIS HEALTHCARE LTD	Mid Cap	Healthcare
ULTRATECH CEMENT LTD	Large Cap	Build Mate
VARUN BEVERAGES LIMITED	Large Cap	Staples
RELIANCE INDUSTRIES LTD	Large Cap	Oil & gas
SYRMA SGS TECHNOLOGY LIMITED	Small Cap	Industrials
SUN PHARMACEUTICAL INDUSTRIES LTD.	Large Cap	Healthcare
TATA CONSULTANCY SERVICES LTD.	Large Cap	IT
ASIAN PAINTS LTD.	Large Cap	Discretionary

Investment Picks

Company	Recommendation	CMP	Target Price	% Upside
Aarti Drugs Ltd	BUY	411	610	48.4
Aarti Industries Ltd	BUY	381	530	39.3
ACC Ltd	BUY	1,752	2,390	36.5
Affle 3I Ltd	BUY	1,767	2,000	13.2
Ambuja Cements Ltd	BUY	547	705	28.9
APL Apollo Tubes Ltd	BUY	1,867	2,100	12.5
Aptus Value Housing Finance India Ltd	BUY	282	405	43.4
Arvind Smartspaces Ltd	BUY	615	940	52.8
Astral Ltd	BUY	1,415	1,625	14.9
Aurobindo Pharma Ltd	BUY	1,217	1,345	10.6
Avenue Supermarts Ltd	BUY	3,833	4,960	29.4
Bajaj Finance Ltd	BUY	1,012	1,200	18.6
Bank of Baroda Ltd	BUY	293	325	11.0
Bharti Airtel Ltd	BUY	2,123	2,530	19.2
Biocon Ltd	BUY	401	450	12.2
Birla Corporation Ltd	BUY	1,088	1,560	43.3
Britannia Industries Ltd	BUY	6,060	6,750	11.4
CCL Products (India) Ltd	BUY	965	1,140	18.1
Cera Sanitaryware Ltd.	BUY	5,300	7,900	49.1
Chalet Hotels Ltd.	BUY	889	1,120	26.0
Cholamandalam Investment & Finance Company Ltd	BUY	1,678	1,880	12.0
CIE Automotive India Ltd	BUY	401	500	24.7
Cipla Ltd	BUY	1,502	1,700	13.2
Coforge Ltd	BUY	1,778	2,300	29.4
Colgate-Palmolive (India) Ltd	BUY	2,104	2,570	22.1
CreditAccess Grameen Ltd	BUY	1301	1,685	29.5
Dabur India Ltd	BUY	493	590	19.6
Dalmia Bharat Ltd	BUY	2,059	2,320	12.7
DCB Bank Ltd	BUY	176	200	13.6
Dhanuka Agritech Ltd	BUY	1,188	1,640	38.0
DOMS Industries Ltd	BUY	2,568	3,110	21.1
Elecon Engineering Compan Ltd	BUY	492	635	29.2
Embassy Office Parks REIT	BUY	427	490	14.6
Equitas Small Finance Bank Ltd	BUY	62	69	11.7
Fortis Healthcare Ltd	BUY	901	1,070	18.8
G R Infraprojects Ltd	BUY	1,040	1,420	36.5
Genus Power Infrastructures Ltd	BUY	304	430	41.4
Gland Pharma Ltd	BUY	1,691	2,170	28.4
Global Health Ltd	BUY	1,185	1,400	18.1
Gravita India Ltd	BUY	1,840	2,500	35.9
Greenply Industries Ltd.	BUY	260	385	48.1
H. G. Infra Engineering Ltd	BUY	809	1,255	55.1
Happiest Minds Technologies Ltd.	BUY	493	690	40.1
HDFC Bank Ltd	BUY	997	1,170	17.4
HealthCare Global Enterprises Ltd	BUY	679	850	25.2
Hindalco Industries Ltd	BUY	864	950	10.0
ICICI Bank Ltd	BUY	1,362	1,650	21.1
Indian Hotels Company Ltd	BUY	739	835	13.1
Inox Wind Ltd	BUY	127	190	49.6
ITC Ltd	BUY	409	480	17.4
J.Kumar Infraprojects Ltd	BUY	598	775	29.7
JK Lakshmi Cement Ltd	BUY	791	1,030	30.3
JSW Energy Ltd.	BUY	485	705	45.5
K E C International Ltd	BUY	741	1,030	39.0

Investment Picks

Company	Recommendation	CMP	Target Price	% Upside
Kalpataru Projects International Ltd.	BUY	1,174	1,475	25.7
Kirloskar Brothers Ltd	BUY	1,624	2,330	43.4
Kotak Mahindra Bank Ltd	BUY	2,161	2,575	19.1
Krishna Institute of Medical Sciences Ltd	BUY	642	795	23.8
Lupin Ltd	BUY	2,109	2,400	13.8
Mahanagar Gas Ltd	BUY	1,285	1,540	19.8
Man Infraconstruction Ltd.	BUY	129	190	47.0
MAS Financial Services Ltd	BUY	323	380	17.6
Max Healthcare Institute	BUY	1,075	1,425	32.6
Minda Corporation Ltd	BUY	596	690	15.8
Mold-Tek Packaging Ltd	BUY	598	670	12.0
Nestle India Ltd	BUY	1,254	1,410	12.5
Nippon Life India Asset Management Ltd	BUY	899	1,000	11.2
NLC India Ltd	BUY	252	310	23.0
NTPC Ltd	BUY	323	400	23.7
Pitti Engineering Ltd	BUY	849	1,335	57.2
Prestige Estates Projects Ltd	BUY	1,604	2,000	24.7
Prince Pipes and Fittings Ltd	BUY	250	400	59.9
Rainbow Children's Medicare Ltd.	BUY	1,362	1,625	19.4
Rites Ltd	BUY	242	280	15.8
Sansera Engineering Ltd	BUY	1,721	1,950	13.3
SBI Cards & Payment Services Ltd	BUY	869	1,035	19.1
Shree Cement Ltd	BUY	25,925	31,655	22.1
Signatureglobal (India) Ltd	BUY	1,142	1,400	22.6
Skipper Ltd	BUY	425	580	36.5
Star Cement Ltd	BUY	223	335	50.1
State Bank of India	BUY	971	1,135	16.9
Steel Strips Wheels Ltd	BUY	192	265	38.0
Tata Steel Ltd	BUY	171	195	14.2
Trent Ltd	BUY	4,183	5,100	21.9
Ujjivan Small Finance Bank Ltd	BUY	53	65	21.8
UltraTech Cement Ltd	BUY	11,682	13,900	19.0
V Mart Retail Ltd	BUY	735	900	22.4
VA Tech Wabag Ltd.	BUY	1,307	1,930	47.7
Varun Beverages Ltd	BUY	480	550	14.6
Welspun Living Ltd	BUY	137	165	20.3
Westlife Foodworld Ltd	BUY	526	650	23.6

Trading Insights

Insight from trading volumes

Script	CMP	Total Volume (x1000)	Monthly Avg Volume(x1000)	% Change
COAL INDIA LTD	400	20,448	4,931	314.7%
LARSEN & TOUBRO LTD	4,059	1,911	1,538	24.3%
HINDALCO INDUSTRIES LTD	864	5,655	4,589	23.2%
UPL LTD	781	3,145	2,588	21.5%
SHREE CEMENT LTD	25,940	47	42	12.5%
ITC LTD	407	10,691	9,892	8.1%
HDFC BANK LIMITED	997	18,178	18,646	-2.5%

Insight from delivery

Script	CMP	Total Delivery Volume(x1000)	Monthly Avg Delivery Volume(x1000)	%Change
INFOSYS LTD	1,668	17,994	6,140	193.1%
HERO MOTOCORP LTD	5,744	934	524	78.1%
GRASIM INDUSTRIES LTD	2,830	564	323	74.8%
BRITANNIA INDUSTRIES LTD	6,061	323	186	74.2%
BAJAJ FINSERV LTD	2,048	815	520	56.7%
WIPRO LTD	271	6,616	4,757	39.1%
UPL LTD	781	2,024	1,558	29.9%

*CMP-Closing Market Price

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