

PROGRESSIVE'S EVENING STROLL

DATE: 19 December, 2025

Market Snapshot:

Post the strong opening, the Index gradually compounded its gains and eventually settled the trade at 25,966.40 with gains of 150.85 points. Barring Capital Markets, all the sectors ended in green, with Defence and Realty being the top performers. Mid and Smallcaps soared over 1% and outperformed Nifty50.

HOW THE DAY TRENDED



INDICES

Index	Close	Points	%Chg.
Sensex	25966.40	150.85	0.58
Nifty50	84929.36	447.55	0.53
Nifty Midcap 100	60310.15	718.00	1.20
Nifty Small Cap 100	17390.35	230.15	1.34

SECTORAL GAINERS / LOSERS

Sectors	Close	Points	%Chg.
NIFTY IND DEFENCE	7524.45	150.35	2.04
NIFTY REALTY	884.90	14.55	1.67
NIFTY AUTO	27657.25	335.35	1.23
NIFTY CAPITAL MKT	4639.55	(6.20)	(0.13)

NIFTY TOP GAINERS / LOSERS

Gainers	CMP (Rs)	%Chg.	Losers	CMP (Rs)	%Chg.
SHRIRAM FINANCE	901.70	3.71	HCL TECH	1642.40	(1.14)
MAX HEALTHCARE	1075.80	2.60	HINDALCO	852.00	(0.55)
BEL	392.85	2.45	KOTAK BANK	2159.50	(0.24)
POWER GRID	263.45	2.13	JSW STEEL	1079.60	(0.24)

INDICES LEVELS FOR December 22, 2025

Nifty (future)		Bank Nifty (future)	
Resistance	26150	Resistance	59500
Support	25950	Support	59000



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KEY TAKEAWAYS OF THE DAY

◆ **HCLTech to acquire Hewlett Packard Enterprise's telco solutions business for USD160mn:**

The company has signed an agreement to acquire the telco solutions business of Hewlett Packard Enterprise (HPE) to strengthen its engineering and AI-led network propositions for global communication service providers (CSPs). The total purchase price is up to USD160mn, including USD15mn of incentives linked to FY25 performance.

◆ **Lupin signs exclusive licensing pact with Neopharmed for Plasil in Philippines and Brazil:**

The company's subsidiaries in the Philippines and Brazil have entered into an exclusive licensing agreement with Italy-based Neopharmed Gentili S.p.A for marketing and promotional rights of the gastroenterology brand Plasil in their respective markets. Under the agreement, Lupin's Philippines subsidiary, Multicare Pharmaceuticals, and its Brazil subsidiary, MedQuimica, will market and promote Plasil, which contains metoclopramide.

◆ **JSW Energy to double Salboni thermal power capacity with Rs400bn investment:**

The company plans to expand its Salboni thermal power project in West Bengal to 3,200MW, raising total investment to around Rs400bn, as part of its strategy to strengthen thermal capacity and meet rising power demand in the state.

◆ **Capgemini-WNS deal signals shift toward AI-led business transformation:**

The company has announced a definitive agreement to acquire WNS, a top digital-led business transformation and services company, for USD76.50 per share in cash. The total consideration is approximately USD3.3bn, excluding WNS's net financial debt. This strategic move positions Capgemini as a dominant player in the rapidly evolving Digital Business Process Services (BPS) and Intelligent Operations markets.

◆ **GPT Infra bags Rs18.04bn flyover contract from MCGM:**

The company has secured a contract valued at Rs18.04bn from the Municipal Corporation of Greater Mumbai (MCGM). The project involves the construction of a flyover along LBS Marg, connecting Kalpana Talkies Kurla (L Ward) to Pankhe Shah Dargah Ghatkopar West (N Ward) in the Eastern Suburbs. The contract will be executed over 36 months, excluding monsoon periods. The project is structured as a joint venture, with GPT Infraprojects holding a 26% share, equivalent to Rs4691.6mn.

Source: Media Reports



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