



# WEEKLY WRAP-UP

01<sup>ST</sup> DECEMBER - 05<sup>TH</sup> DECEMBER 2025

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## HIGHLIGHTS OF THE WEEK

01 Dec 2025-05 Dec 2025

### DOMESTIC:

- LIC partners with Yes Bank to expand reach through new bancassurance deal
- Biocon Board to weigh BBL stake buyout, fundraising options
- British American Tobacco plans to offload stake in India's ITC Hotels
- Airtel-Nokia partnership to help developers create new revenue streams
- Suzlon to set up AI enabled smart factories
- Cancellations to continue for 2-3 more days, says IndiGo to DGCA; operations to normalise by 26th Feb
- JFE to invest Rs157.5bn in JV with JSW to run Bhushan Power, target 10MT steel capacity by 2030
- NBCC bags five orders worth Rs6,650mn ranging from redevelopment to repair works
- Mahindra Lifespace bags new redevelopment project in Matunga
- BEML gets Rs414cr top-up order from Bangalore Metro for six more trainsets
- Infosys seeing surge in traction among clients for India-based GCCs
- Birla Estates (WoS of ABREL) partners Sikka Group to co-develop Rs1,600cr Noida project
- IRFC secures USD300mn loan from Japan's Sumitomo Mitsui Banking Corp to finance new foray
- KPI Green wins Rs4890mn order for 110MW floating solar project
- Reliance completes merger of Star Television Productions with Jiostar
- IRB Infrastructure approves sale of Gandeva Ena project for Rs513cr
- Raymond Realty launches ultra-luxury BKC project, targets Rs2k-cr revenue
- Diamond Power bags Rs7480mn Adani Green order for supply of solar cables
- SEAMEC signs USD43mn charter hire contract with HAL Offshore for Agastya vessel
- HCLTech partners with Strategy to power global rollout of AI-driven Strategy Mosaic
- Deepak Nitrite arm begins operations at Rs515cr nitric acid plant in Gujarat
- Aditya Birla Sun Life sets up GIFT City arm to run fund management, advisory operations
- RailTel seals second order in 2 days, bags Rs64cr CPWD contract for ICT network
- SKF India Industrial targets near doubling of revenue in five years
- Adani, Hindalco eye investments in Peru's copper sector as demand surges
- ED attaches Rs1,120cr fresh assets linked to Anil Ambani firms in PMLA case
- Dr. Reddy's pins hopes on semaglutide, but timely approvals hold the key
- Supreme Court to wrap up Yes Bank AT-1 bond case hearings in January

### ECONOMY:

- RBI MPC cuts repo rate by 25 bps to 5.25%, projects FY26 growth at 7.3%
- US team likely to visit India next week for trade talks: Sources
- Fitch raises FY26 growth forecast to 7.4% from 6.9%

### INDUSTRY:

- Railways records 4.2% higher freight loading in November 2025
- US to exempt UK pharmaceuticals and ingredients under trade deal
- Agrochemical industry set for recovery as exports bounce back after two years

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### COVERAGE NEWS:

**Sun Pharmaceutical Industries Ltd:** (i) Sun Pharma alongwith its subsidiaries/associate companies has launched its global innovative drug, Ilumya (tildrakizumab) in the Indian markets, (ii) The Board of Sun Pharma Laboratories Ltd (WoS of SunP) has approved the proposal for an investment of Rs30bn for setting up a greenfield formulations manufacturing facility in Madhya Pradesh.

**Royal Orchid Hotels Ltd:** The company has expanded its presence in Rajasthan with the launch of Regenta Anantam Resort (120 keys) to be operated under a management agreement.

**Ajooni Biotech Ltd:** The company has received an order worth Rs270mn for supply of cattle feed.

**Zen Technologies Ltd:** The company has received orders worth Rs1200mn (including GST) from the Ministry of Defence for the supply of Comprehensive Training Node comprising various training simulators and equipment.

**Lloyds Engineering Works Ltd:** The company has entered into an agreement with Virtualabs S.r.l., Italy for the development of radar technology in defense and civil applications

**Hind Rectifiers Ltd:** The Board has executed the sale agreement on 04th Dec'25 for its Dehradun facility at a price of Rs95mn.

**Timken India Ltd:** With regard to the purchase of equity shares of Timken GGB Technology Pvt. Ltd from Timken Europe B.V. and The Timken Company has been completed on 01st Dec'25.

**Arkade Developers Ltd:** The company has approved the incorporation of WoS Arkade 360 Facility Management. It's a related party, and Arkade holds 100% of the share capital in Arkade 360 Facility Management.

**Fineotex Chemical Ltd:** Fineotex Biotex Healthguard FZE (WoS of FCL) has entered into definitive agreements to acquire equity interests in FrackMex Equipment and Services LLC (USD179,200), CrudeChem Technology LLC (USD11,007,360), Oil Pro Advantage INC (USD8,960) and Lonestar Technoboost LLC (USD4,480).

### The Week That Went By:

Encouraging domestic factor (GDP) helped Nifty50 start the month at a record level, but soon after reaching a new high of 26,328.80, the Index struggled to maintain those levels and erased all its gains. The bearish momentum persisted into the second trading session, and the Index continued its downward trend. In the mid-week, the Index tested its 21DMA and trendline support and reversed, but it struggled to surpass the level of 26,100. On the last day of the week, the Index added to its gains under the leadership of financial stocks after the announcement of a 25 bps rate cut by the MPC committee. Nifty50 settled at 26,186.45 with a weekly loss of 16.50 points. Among sectors, the IT sector was the top performer, followed by Auto, while Defence and Media experienced the most correction. Selling pressure was evident in the broader markets as Mid and Smallcaps declined by 0.73% and 1.80%, respectively, underperforming the Frontline Index.

Nifty50=26,186.45

Sensex30=85,712.37

Nifty Midcap 100=60,594.60

Nifty Smallcap100=17,507.75

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### NIFTY (WEEKLY)



### BANK NIFTY (WEEKLY)



### MARKET OUTLOOK

**Nifty50** successfully retested its trendline and 21DMA support at 25,980, which will now serve as the immediate support level, while 26,325 will act as the near-term resistance. A decisive breakout above this resistance may open the door toward 26,500, whereas a breakdown below support could drag the Index lower toward 25,700. For **BankNifty**, the support is placed at 59,370, with resistance seen at 60,300. Despite a strong breakout, the **Auto sector** failed to confirm it and formed a Doji candlestick pattern on the weekly chart, indicating indecision. However, the daily chart reflects signs of trend continuation. We will wait for next week's activity for confirmation. The **Capital Market Index** has formed a Bearish Engulfing candle, along with a bearish divergence in RSI (yet to be confirmed), suggesting a potential short-term reversal; however, a close above this week's high would negate the bearish setup. The **Defence segment** remains range-bound and awaits a breakout on either side for clearer trend direction. The **IT sector** is moving closer to a significant breakout from a Bullish Rounding Bottom formation. A strong rally could be seen post-breakout (**Coforge: Nearing a Cup and Handle breakout**). The **Metal sector** appears to be forming a Bullish Flag and Pole pattern, worth monitoring for the potential upside (**HindCopper- Rounding Bottom breakout with strong volumes; Nalco- strong momentum**). In recent weeks, **Midcaps** have been consolidating within a range, while **Smallcaps** have been trending lower with a falling channel structure. A sustainable market rally will require improved participation from both segments.



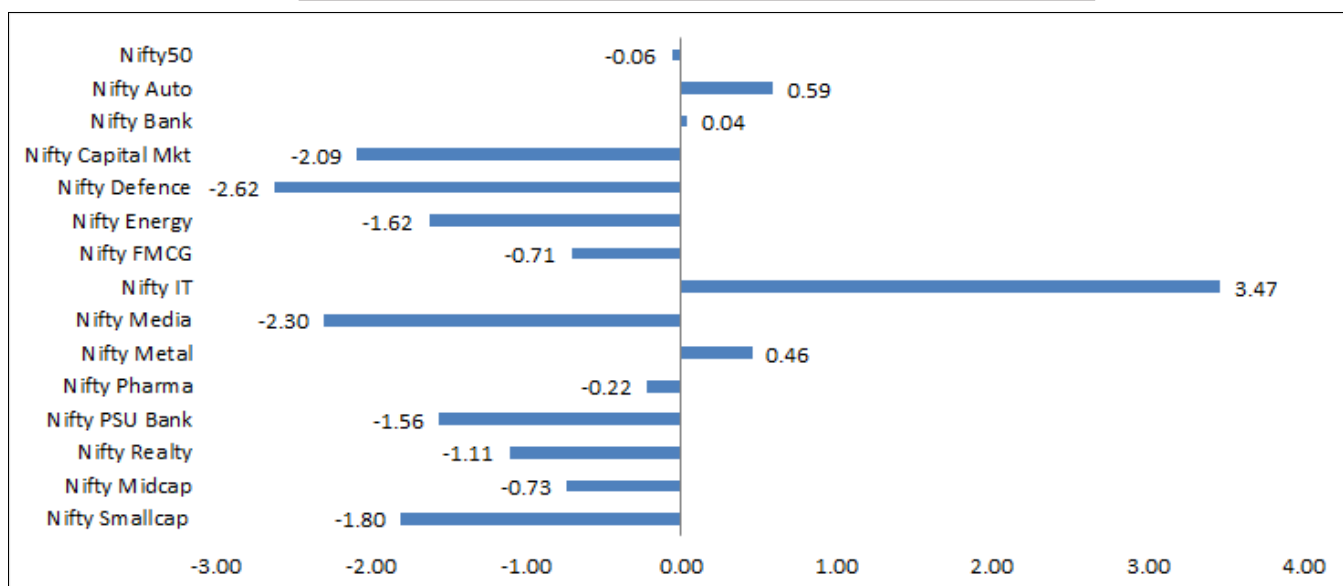
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### NIFTY 50 COMPONENTS (WEEKLY PERFORMANCE)

Adani Enterprises	(0.83%)	HDFC Life	0.23%	Reliance	(1.56%)
Adani Ports	(0.36%)	Hindalco	1.61%	SBI Life	2.48%
Apollo Hospital	(1.94%)	HUL	(5.15%)	SBIN	(0.48%)
Asian Paints	3.10%	ICICI Bank	0.30%	ShriRam Finance	(0.30%)
Axis Bank	(0.08%)	Indigo	(9.07%)	Sun Pharma	(1.47%)
Bajaj Auto	0.33%	INFY	3.58%	Tata Consumer	(0.84%)
Bajaj Finserv	(0.06%)	ITC	0.07%	Tata Motors	(0.45%)
Bajaj Finance	0.85%	JioFin	(0.82%)	Tata Steel	3.35%
BEL	(1.18%)	JSW Steel	0.16%	TCS	3.56%
Bharti Airtel	0.47%	Kotak Bank	1.45%	Tech Mahindra	(2.23%)
Cipla	(0.65%)	LT	(1.00%)	TITAN	(0.87%)
Coal India	0.98%	M&M	(1.40%)	Trent	(1.68%)
Dr. Reddy's Labs	1.48%	Maruti	2.58%	UltraTech	0.09%
Eicher Motors	2.27%	Max Healthcare	(5.35%)	Wipro	3.99%
Eternal	(2.91%)	Nestle India	(1.20%)		
Grasim	0.29%	NTPC	(0.98%)		
HCL Tech	3.52%	ONGC	(0.45%)		
HDFC Bank	(0.55%)	PowerGrid	(0.04%)		

### SECTORAL PERFORMANCE



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### SECTORAL GAINER



With gains of 3.47%, the **IT sector** outperformed the Frontline Index. All the components ended the week in green, with **Mphasis (+4.89%)** and **Wipro (+3.99%)** being the major gainers, followed by **Infy (+3.58%)** and **Tech Mahindra (+3.56%)**. As shown in the chart, the sector is heading towards providing a major breakout from a **Bullish Rounding Bottom Pattern**. A strong rally can be expected post the pattern breakout.

### SECTORAL LOSER



The **Defence segment** declined by 2.62% and lagged Nifty50. Barring **Unimech (+1.28%)**, all the other constituents settled the week in red, where **GRSE (11.72%)** and **Dynatomic Technologies (8.37%)** were the major laggards, followed by **Data Pattern (7.10%)** and **BEML (6.67%)**. As depicted in the above chart, the sector is still oscillating in its well-maintained range. Awaiting a breakout on either sides for better clarity of trend.

## HIGHLIGHTS OF THE WEEK

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