

Market Snapshot

KEY INDICES	28-Nov-25	21-Nov-25	05-Sep-25
S&P CNX NIFTY	26202.95	26068.15	0.52
SENSEX	85706.67	85231.92	0.56
NIFTY MIDCAP 100	61043.25	60276.30	1.27
NIFTY SMLCAP 100	17829.25	17847.50	-0.10

(Source: Capitaline, [Investing.com](https://www.investing.com))

Sectoral Snapshot

KEY INDICES	28-Nov-25	21-Nov-25	%Ch
NIFTY BANK	59752.70	58867.70	1.50
NIFTY AUTO	27774.60	27537.85	0.86
NIFTY FMCG	55595.80	55504.70	0.16
NIFTY IT	37405.50	36885.35	1.41
NIFTY METAL	10293.05	10142.55	1.48
NIFTY PHARMA	22998.30	22580.95	1.85
NIFTY REALTY	903.15	905.60	-0.27
BSE CG	69208.59	69364.01	-0.22
BSE CD	61868.22	62208.49	-0.55
BSE Oil & GAS	28207.28	28636.83	-1.50
BSE POWER	6613.14	6650.29	-0.56

(Source: [Investing.com](https://www.investing.com))

FII & DII Activities (Rs Crore)

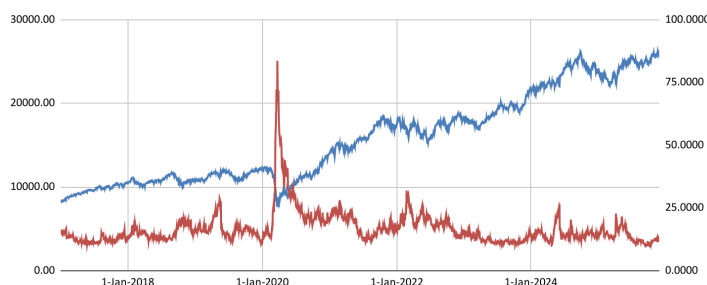
21/11/2025 to 28/11/2025

Activities	FIIs	DIIIs
Buy	132026.95	97027.55
Sell	131553.25	71103.32
Net	473.70	25924.23

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



(Source: [NSE](https://www.nseindia.com))

Barometers climb for 3rd straight week; Nifty ends above 26,200 level

The key domestic indices witnessed major gains during the week, extending gains for third straight week amid positive domestic and global cues. Investor sentiment remained upbeat on rising expectations of interest rate cuts by the Reserve Bank of India (RBI) and the US Federal Reserve in their December meetings. Market participants will now look forward to monthly sales data and closely track India-US trade discussions, global market trends, gold and crude oil prices, and key macroeconomic indicators for further direction.

In the week ended on Friday, 28 November 2025, the S&P BSE Sensex advanced 474.75 points or 0.56% to settle at 85,706.67. The Nifty 50 index added 134.80 points or 0.52% to settle at 26,202.95. The BSE Mid-Cap index jumped 1.19% to close at 47,211.40. The BSE Small-Cap added 0.08% to end at 52,053.71.

The International Monetary Fund (IMF) said India's economy is expected to grow 6.6% in 2025-26, noting that strong GST reforms should help soften the impact of recent US tariff

Sensex Gainers - Weekly

SCRIPS	28-Nov-25	21-Nov-25	%Ch
TECHM	1516.85	1460.85	3.83
BAJFINANCE	1037.65	1004.95	3.25
SUNPHARMA	1831.25	1779.80	2.89
WIPRO	249.45	244.55	2.00
BAJAJFINSV	2094.35	2054.00	1.96

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	28-Nov-25	21-Nov-25	%Ch
BHARTIARTL	2101.05	2162.85	-2.86
POWERGRID	269.90	277.65	-2.79
NESTLEIND	1260.30	1280.85	-1.60
TMPV	356.85	362.25	-1.49
ULTRACEMCO	11600.00	11728.75	-1.10

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	28-Nov-25	21-Nov-25	%Ch
HINDALCO	808.40	777.70	3.95
TECHM	1517.30	1461.50	3.82
BAJFINANCE	1037.50	1004.10	3.33
SUNPHARMA	1831.60	1779.70	2.92
HEROMOTOCO	6174.50	6002.50	2.87

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	28-Nov-25	21-Nov-25	%Ch
GAIL	176.09	182.99	-3.77
IOC	161.75	167.35	-3.35
BHARTIARTL	2101.60	2162.70	-2.83
SBILIFE	1966.00	2022.50	-2.79
POWERGRID	269.95	277.60	-2.76

(Source: Capitaline)

hikes. It highlighted that growth remained solid, with real GDP rising 7.8% in the first quarter after expanding 6.5% in 2024-25. The Fund added that India's goal of becoming an advanced economy will depend on pushing forward broader structural reforms to lift long-term growth potential.

Global Market:

Headline inflation in Japan's capital eased to 2.7% in October from 2.8% the month before. Core inflation, which strips out prices of fresh food but includes energy prices, came in at 2.8%, slightly higher than the widely reported 2.7% figure. This was above the central bank's 2% target, boosting the case for a near-term rate hike.

The Bank of Korea kept its benchmark interest rate unchanged at 2.5% for a fourth consecutive policy meeting, amid a weakened local currency and overheated housing market.

China's industrial profits in October plunged 5.5% from a year earlier, government data showed Thursday. Profits for the first 10 months of the year rose 1.9% year-on-year, compared to the 3.2% rise in the January-to-September period.

In Australia, the consumer price index rose 3.8% year-on-year in October, the fastest pace since adopting a new headline inflation measure in April, according to the official release. The largest contributor to the elevated inflation was the housing sector, which saw prices rise 5.9%.

In the US, the September wholesale inflation rose by 0.3%, keeping the annual level at 2.7%, according to the Bureau of Labor Statistics. Retail sales rose 0.2% in September, but after factoring in the 0.3% increase in prices that month, spending was actually down 0.1%.

The core producer price index (PPI) rose just 0.1% in September, which brought the annual rate to 2.6%, the

Nifty Midcap 100 Gainers - Weekly

SCRIPS	28-Nov-25	21-Nov-25	%Ch
ABCAPITAL	358.05	325.65	9.95
ASHOKLEY	158.12	144.69	9.28
M&MFIN	371.85	342.55	8.55
L&TFINANCE	312.35	288.70	8.19
COFORGE	1908.70	1797.50	6.19

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	28-Nov-25	21-Nov-25	%Ch
WHIRLPOOL	1072.10	1180.30	-9.17
DEEPAKNTR	1558.60	1691.80	-7.87
DEVYANI	135.64	144.29	-5.99
MSUMI	45.66	48.42	-5.70
TATACOMM	1815.20	1920.90	-5.50

(Source: Capitaline)

World Markets

KEY INDICES	28-Nov-25	21-Nov-25	%Ch
DJIA	47716.42	46245.41	3.18
NASDAQ	23365.69	22273.08	4.91
BOVESPA	159072.12	154770.09	2.78
FTSE 100	9720.51	9539.71	1.90
CAC 40	8122.71	7982.65	1.75
DAX	23836.79	23091.87	3.23
MOEX RUSSIA	2676.42	2685.03	-0.32
NIKKEI 225	50253.91	48625.88	3.35
HANG SENG	25858.89	25220.02	2.53
STRAITS TIMES	4523.96	4469.14	1.23
SHANGHAI COMPOSITE	3888.60	3834.89	1.40
JAKARTA	8508.71	8414.35	1.12

(Source: Capitaline, [Investing.com](https://www.investing.com))

lowest since July 2024. The consumer confidence declined sharply in November to a reading of 88.7, the lowest level since April.

(Source: Capitaline)

Outlook and Technical View

Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 26157, 26111, 26049, 25982 while levels of 26266, 26327, 26374, 26452 may act as resistance with pivot point at 26219.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	30-Dec-25	26396.00	26260.50	0.52%	193.05	544764	307479	77.17%
BANKNIFTY	30-Dec-25	60082.40	59220.00	1.46%	1214.70	105016	53156	97.56%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SAIL	134.91	135.96	30-Dec-25	8.88%
DLF	723.60	729.00	30-Dec-25	8.51%
UPL	758.65	764.30	30-Dec-25	8.49%
JSWSTEEL	1160.30	1168.90	30-Dec-25	8.45%
JINDALSTEL	1044.40	1052.10	30-Dec-25	8.41%
PETRONET	271.85	273.85	30-Dec-25	8.39%
PNB	124.50	125.41	30-Dec-25	8.34%
HEROMOTOCO	6174.50	6219.50	30-Dec-25	8.31%
MARICO	717.40	722.60	30-Dec-25	8.27%
VEDL	526.00	529.80	30-Dec-25	8.24%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
ASHOKLEY	158.12	156.72	30-Dec-25	-10.10%
VOLTAS	1376.30	1373.40	30-Dec-25	-2.40%
PAGEIND	38320.00	38315.00	30-Dec-25	-0.15%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	58651750	48660000	1.21

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. GLENMARK	2. LAURUSLABS	3. AJANTPHARM	4. SUNPHARMA	5. LUPIN
6. JBCHEPHARM	7. ZYDUSLIFE	8. AUROPHARMA	9. ABBOTINDIA	10. DIVISLAB
11. GAIL	12. IOC	13. HINDPETRO	14. OIL	15. BPCL
16. ONGC				

(Source: [Moneycontrol](#))

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