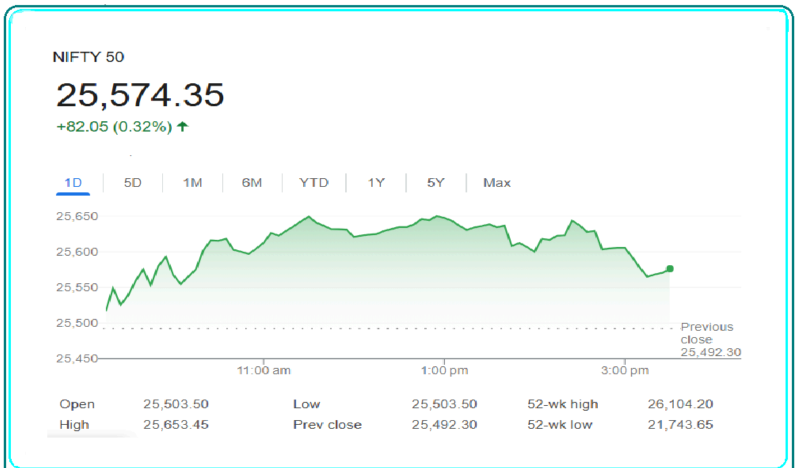
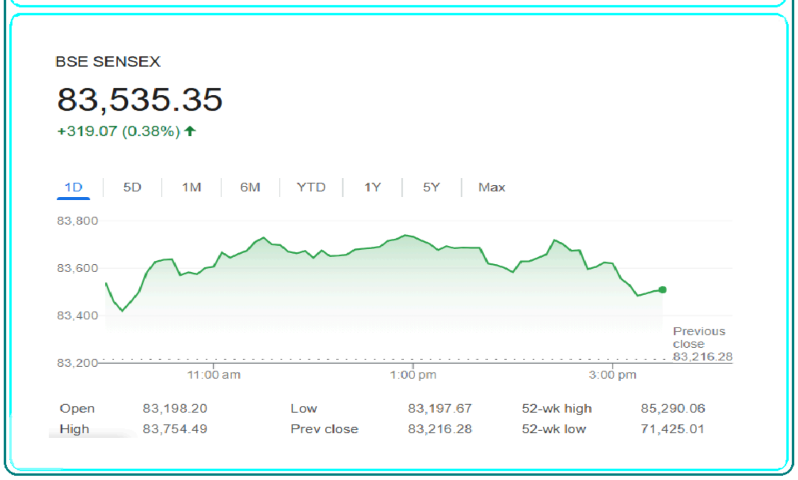
# EQUITY DAILY REPORT

10th November 2025

## Index Chart




(Source: Bloomberg)

## Indian Markets

| Indices | Close | Previous | Change(%) |
|---|---|---|---|
| **NIFTY 50** | 25574.35 | 25492.30 | **0.32%** |
| **S&P BSE SENSEX** | 83535.35 | 83216.28 | **0.38%** |
| **NIFTY MID100** | 60124.25 | 59843.15 | **0.47%** |
| **NIFTY SML100** | 18138.60 | 18075.95 | **0.35%** |

(Source: NSE, BSE)

## Market Wrap Up

- Key equity indices closed with minor gains, halting a three-day losing streak. Market sentiment improved on hopes of a potential resolution to the ongoing U.S. government shutdown, now stretching beyond 40 days. However, investors remained cautious, monitoring Q2 earnings announcements, key economic data, and global developments due later this week. The Nifty ended above the 25,550 mark.

- The S&P BSE Sensex climbed 319.07 points or 0.38% to 83,535.35. The Nifty 50 index added 82.05 points or 0.32% to 25,574.35. In the past three trading sessions Sensex and Nifty declined 0.91% and 1.05%, respectively.

- The S&P BSE Mid-Cap index advanced 0.62% and the S&P BSE Small-Cap index shed 0.28%.

- Among the sectoral indices, the Nifty IT index (up 1.62%), the Nifty Pharma index (up 0.95%) and the Nifty Metal index (up 0.55%) outperformed the Nifty 50 index. Meanwhile, the Nifty Media index (down 1.04%), the Nifty Realty index (down 0.24%) and the Nifty FMCG index (down 0.19%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **November** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **742** contracts at the end of the day.

- **Long** position build up for the **November** series has been witnessed in **RELIANCE**, **BHEL**, **BHARTIARTL**, **ICICIBANK**, **HDFCBANK**, **INFY**.

- **Short** position build up for the **November** series has been witnessed in **SBIN**, **ETERNAL**.

- **Unwinding** position for the **November** series has been witnessed in **COALINDIA**, **WIPRO**, **HINDUNILVR**.

(Source: Capitaline F&O)

## Sectoral Indices

| Indices | Close | Previous | Change(%) |
|---|---|---|---|
| NIFTY BANK | 57937.55 | 57876.80 | 0.10% |
| NIFTY AUTO | 26859.85 | 26779.55 | 0.30% |
| NIFTY FMCG | 55334.45 | 55437.20 | -0.19% |
| NIFTY IT | 35688.25 | 35117.60 | 1.62% |
| NIFTY METAL | 10484.50 | 10426.80 | 0.55% |
| NIFTY PHARMA | 22379.85 | 22169.80 | 0.95% |
| NIFTY REALTY | 944.15 | 946.40 | -0.24% |
| BSE CG | 70225.64 | 69366.04 | 1.24% |
| BSE CD | 60340.85 | 59969.13 | 0.62% |
| BSE Oil & GAS | 28668.43 | 28653.45 | 0.05% |
| BSE POWER | 6686.35 | 6687.59 | -0.02% |

(Source: NSE, BSE)

## Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|---|---|---|---|
| NIKKEI225 | 50911.76 | 50276.37 | 1.26% |
| HANG SENG | 26649.06 | 26241.83 | 1.55% |
| STRAITS TIMES | 4488.13 | 4492.24 | -0.09% |
| SHANGHAI | 4018.60 | 3997.56 | 0.53% |
| KOSPI | 4073.24 | 3953.76 | 3.02% |
| JAKARTA | 8391.24 | 8394.59 | -0.04% |
| TAIWAN | 27869.51 | 27651.41 | 0.79% |
| KLSE COMPOSITE | 1627.38 | 1619.13 | 0.51% |
| All ORDINARIES | 9109.40 | 9031.70 | 0.86% |

(Source: Yahoo Finance)

## Exchange Turnover (Crores)

| Market | Current | Previous |
|---|---|---|
| NSE Cash | 101317.69 | 118390.89 |
| NSE F&O | 142116.05 | 191238.60 |

(Source: NSE)

## FII Activities (Crores)

| ACTIVITIES | Cash |
|---|---|
| NET BUY | - |
| NET SELL | 4114.85 |

(Source: NSE)

## Corporate News

- **Bajaj Auto** posted a 23.60% year-on-year growth in its net profit for the quarter ended September 30, 2025. It posted a revenue growth of 13.70% to Rs. 14,922 Crore.
- **Torrent Pharma** posted a net profit growth of 30.40% on a year-on-year basis to Rs. 591 Crore. The company posted a 14.30% growth in its revenue at Rs. 3,302 Crore.
- **Force Motors** posted a robust net profit growth at Rs. 350.60 Crore in the September 2025 quarter. In the previous corresponding quarter, the business logged a net profit of Rs. 135 Crore. The business registered a growth of 7.20% in its revenue at Rs. 2,081 Crore.
- **Solar Industries India** reported a 20.66% jump in consolidated net profit to Rs 344.97 crore in Q2 FY26, compared to Rs 285.88 crore posted in Q2 FY25. Revenue from operations increased 21.35% YoY to Rs 2,082.22 crore for the quarter ended 30 September 2025.
- **Borosil** reported a 23.96% surge in consolidated net profit to Rs 22.71 crore in Q2 FY26 as against Rs 18.32 crore posted in Q2 FY25. Revenue from operations rose 22.33% to Rs 340.36 crore in the quarter ended 30 September 2025.
- **Hero MotoCorp**'s electric brand VIDA has launched the VX2 Go 3.4 kWh scooter, unveiled by Union Minister Nitin Gadkari. With a 100 km range, dual removable batteries, and a Rs. 1.02 lakh price tag, the new model expands VIDA's VX2 lineup and reinforces its goal of making electric mobility more affordable for Indian households.
- **IndusInd Bank** MD and CEO Rajiv Anand said the bank is rebuilding its culture by hiring "high-integrity professionals" across key roles, including a new CFO, internal audit head, general counsel and chief risk officer. The overhaul aims to strengthen governance and controls as the bank targets improved performance by FY27.
- **Emami** posted consolidated net profit declined 30.24% to Rs 148.35 crore in the quarter ended September 2025 as against Rs 212.66 crore during the previous quarter ended September 2024. Sales declined 10.34% to Rs 798.51 crore in the quarter ended September 2025 as against Rs 890.59 crore during the previous quarter ended September 2024.

## Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|---|---|---|---|
| **INFY** | 1513.50 | 1476.80 | **2.49%** |
| **HCLTECH** | 1540.50 | 1512.40 | **1.86%** |
| **BAJFINANCE** | 1085.00 | 1066.60 | **1.73%** |
| **WIPRO** | 239.84 | 236.49 | **1.42%** |
| **COALINDIA** | 381.35 | 376.00 | **1.42%** |

(Source: Moneycontrol)

## Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|---|---|---|---|
| **TRENT** | 4283.70 | 4627.30 | **-7.43%** |
| **MAXHEALTH** | 1098.00 | 1135.30 | **-3.29%** |
| **TATACONSUM** | 1142.70 | 1167.20 | **-2.10%** |
| **ETERNAL** | 301.45 | 306.10 | **-1.52%** |
| **APOLLOHOSP** | 7529.50 | 7642.00 | **-1.47%** |

(Source: Moneycontrol)

- **Ashoka Buildcon** has secured a letter of acceptance (LoA) for a contract worth Rs. 539.35 Crore. This LoA is received from North Western Railway, Ajmer. The project entails upgradation of the Northern Railway electric traction system from 1×25 kV to 2×25 kV.

- **Swiggy Limited** has approved raising up to Rs. 10,000 Crore via a Qualified Institutional Placement (QIP) for bolstering its balance sheet position.

- **Hindustan Petroleum Corp** bought 2 million barrels each of U.S. West Texas Intermediate and Abu Dhabi's Murban crude for January delivery, while Mangalore Refinery and Petrochemicals Ltd purchased 1 million barrels of Basra Medium crude for early January delivery.

- **NBCC** announced that it has signed a broad framework Memorandum of Understanding (MoU) with Pantheon Elysee Real Estate Development LLC, a prominent real estate player based in Dubai, UAE.

- **Alembic Pharmaceuticals** has achieved a pivotal milestone with the final green light from the US health authority for its generic Sumatriptan autoinjector. This achievement signifies the company's inaugural foray into drug-device combo products, aimed at alleviating the agonizing symptoms of migraines and cluster headaches.

- **Marksans Pharma** has received zero observations in a current Good Manufacturing Practice (cGMP) inspection conducted by the US Food and Drug Administration (USFDA) at its Goa facility.

- Over the last few months, Big AI has made big moves in India. First it was Aravind Srinivas's Perplexity, which partnered with India's second largest mobile network **Airtel** to offer their premium Pro version for free in India. They gave away a subscription priced around Rs 17,000 annually. That was in July. It set the ball rolling for more such deals.

(Source: Business Standard, Economic Times, Smart investor)

## Global News

- China's consumer prices rose 0.2% yoy in October 2025, rebounding from a 0.3% decline in the prior month. On a monthly basis, consumer prices also increased 0.2%, following a 0.1% gain in September.

- China's producer prices declined 2.1% yoy in October 2025, slowing slightly from a 2.3% drop in the previous month. Monthly, the PPI inched up 0.1% after being flat in September.

- U.S. consumer sentiment index slid to 50.3 in November after falling to 53.6 in October.

- U.S. total consumer credit rose by $13.09 billion in September 2025, following an upwardly revised $3.13 billion gain in August.

- Eurozone Sentix investor confidence index fell unexpectedly to -7.4 in November from -5.4 in October.

(Source: Market Watch, RTT News, Reuters, Bloomberg)

# Economic News

- Crude Oil traded at US$ 59.97/bbl (IST 17:00).
- INR weakened to Rs. 88.70 from Rs. 88.67 against each US$ resulting in daily change of 0.03%.
- The government will permit 1.5 million tonnes of sugar exports for the 2025-26 season. An export duty of 50 percent on molasses has also been removed. This decision aims to support sugarcane farmers. Sugar production is projected to exceed domestic demand, leading to surplus stocks. The export allocation is less than industry requests.
- India's Commerce Minister Piyush Goyal met with Australian counterparts in Melbourne to discuss trade in goods, services, investment, and cooperation. The discussions focused on unlocking the full potential of the India-Australia Economic Partnership and advancing negotiations for a comprehensive CECA, building on the existing ECTA.
- The first part of the Economic Cooperation and Trade Agreement (ECTA) entered into force in December 2022.
- Industry lobby CII has urged the government to create a new India Development and Strategic Fund. This professionally managed fund aims to finance India's long-term growth and secure critical economic interests globally. The proposal envisions a substantial corpus by 2047, funded through asset monetisation and equity transfers. It will invest in domestic development and strategic overseas acquisitions.
- Rural India continues to lead the country's consumption recovery, outpacing urban demand despite income tax cuts and GST 2.0 reforms aimed at stimulating city-based spending, according to Motilal Oswal Financial Services Ltd. (MOFSL) in its latest ECOSCOPE report titled "Rural Rules, Urban Follows."

(Source: Economic Times, Business Standard)

# Forthcoming Events

### Board Meetings as on 11/11/2025

| | |
|---|---|
| Bajaj Finserv Limited | Financial Results |
| Max Financial Services Limited | Financial Results |
| Tata Power Company Limited | Financial Results |
| Bosch Limited | Financial Results |
| BSE Limited | Financial Results |
| Godrej Industries Limited | Financial Results |
| Aavas Financiers Limited | Financial Results |
| Apeejay Surrendra Park Hotels Limited | Financial Results |

| | |
|---|---|
| Atul Auto Limited | Financial Results |
| Ausom Enterprise Limited | Financial Results |
| Awfis Space Solutions Limited | Financial Results |
| Bajaj Holdings & Investment Limited | Financial Results |
| Ballarpur Industries Limited | Financial Results |
| Balrampur Chini Mills Limited | Financial Results/Dividend |
| Belrise Industries Limited | Financial Results |
| Bharat Forge Limited | Financial Results/Fund Raising |
| Bharat Rasayan Limited | Financial Results |
| Bharat Road Network Limited | Financial Results |
| Bikaji Foods International Limited | Financial Results |
| Biocon Limited | Financial Results/Fund Raising |
| BLS International Services Limited | Financial Results |
| BOROSIL RENEWABLES LIMITED | Financial Results |
| Ceigall India Limited | Financial Results |
| Cera Sanitaryware Limited | Financial Results |
| Chaman Lal Setia Exports Limited | Financial Results |
| Cheviot Company Limited | Financial Results |
| Container Corporation of India Limited | Financial Results/Dividend |
| COSMO FIRST LIMITED | Financial Results |
| Dhampur Sugar Mills Limited | Financial Results |
| E2E Networks Limited | Financial Results |
| Edelweiss Financial Services Limited | Financial Results/Fund Raising |
| EID Parry India Limited | Financial Results |
| EIH Limited | Financial Results |
| ESAF Small Finance Bank Limited | Financial Results |
| Federal-Mogul Goetze (India) Limited. | Financial Results |
| Finolex Cables Limited | Financial Results |
| Fortis Healthcare Limited | Financial Results |
| Global Vectra Helicorp Limited | Financial Results |
| GMR Power and Urban Infra Limited | Financial Results |
| Gokaldas Exports Limited | Financial Results |
| Gujarat Fluorochemicals Limited | Financial Results |
| Gujarat State Fertilizers & Chemicals Limited | Financial Results |
| Gujarat State Petronet Limited | Financial Results |
| Hindustan Copper Limited | Financial Results |
| HT Media Limited | Financial Results |
| IFCI Limited | Financial Results |
| India Pesticides Limited | Financial Results |
| India Tourism Development Corporation Limited | Financial Results |
| IndiGrid Infrastructure Trust | Financial Results |
| Indo Count Industries Limited | Financial Results |
| IOL Chemicals and Pharmaceuticals Limited | Financial Results |

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|---|---|
| Jayshree Tea & Industries Limited | Financial Results |
| JB Chemicals & Pharmaceuticals Limited | Financial Results |
| Jupiter Wagons Limited | Financial Results |
| Kirloskar Electric Company Limited | Financial Results |
| Kirloskar Oil Engines Limited | Financial Results |
| Kolte - Patil Developers Limited | Financial Results |
| Landmark Cars Limited | Financial Results |
| Laxmi Dental Limited | Financial Results |
| Lokesh Machines Limited | Financial Results |
| Madras Fertilizers Limited | Financial Results |
| Manba Finance Limited | Financial Results/Dividend |
| Marathon Nextgen Realty Limited | Financial Results |
| Mayur Uniquoters Ltd | Financial Results |
| MOIL Limited | Financial Results/Dividend |
| N. B. I. Industrial Finance Company Limited | Financial Results |
| National Fertilizers Limited | Financial Results |
| Noida Toll Bridge Company Limited | Financial Results |
| Orchid Pharma Limited | Financial Results |
| Orient Bell Limited | Financial Results |
| Orient Technologies Limited | Financial Results |
| Parag Milk Foods Limited | Financial Results |
| PC Jeweller Limited | Financial Results |
| PI Industries Limited | Financial Results |
| Precision Camshafts Limited | Financial Results |
| Pritika Auto Industries Limited | Financial Results |
| PTC India Limited | Financial Results |
| Rail Vikas Nigam Limited | Financial Results |
| Raj Television Network Limited | Financial Results |
| Rategain Travel Technologies Limited | Financial Results |
| RITES Limited | Financial Results/Dividend |
| Rossell India Limited | Financial Results |
| S Chand And Company Limited | Financial Results |
| Sharda Motor Industries Limited | Financial Results |
| Signpost India Limited | Financial Results |
| Stanley Lifestyles Limited | Financial Results |
| Sterling Tools Limited | Financial Results |
| Subex Limited | Financial Results |
| Sundaram Brake Linings Limited | Financial Results |
| Surya Roshni Limited | Financial Results/Dividend |
| Suven Life Sciences Limited | Financial Results |
| Texmaco Rail & Engineering Limited | Financial Results |
| Thermax Limited | Financial Results |
| Torrent Power Limited | Financial Results |

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|---|---|
| Transrail Lighting Limited | Financial Results |
| Tree House Education & Accessories Limited | Financial Results |
| TV Today Network Limited | Financial Results |
| TVS Electronics Limited | Financial Results |
| TVS Srichakra Limited | Financial Results |
| Unichem Laboratories Limited | Financial Results |
| Unicommerce Esolutions Limited | Financial Results |
| Vesuvius India Limited | Financial Results |
| Welspun Enterprises Limited | Financial Results |
| Yatra Online Limited | Financial Results |
| Zaggle Prepaid Ocean Services Limited | Financial Results |

(Source: NSE)

## Corporate Actions as on 11/11/2025

| | |
|---|---|
| Astral Limited | Interim Dividend - Rs 1.50 Per Share |
| Chalet Hotels Limited | Dividend - Re 1 Per Share |
| Chambal Fertilizers & Chemicals Limited | Interim Dividend - Rs 5 Per Share |
| Garden Reach Shipbuilders & Engineers Limited | Interim Dividend - Rs 5.75 Per Sh |
| Indian Metals & Ferro Alloys Limited | Interim Dividend - Rs 5 Per Share |
| Metropolis Healthcare Limited | Interim Dividend - Rs 4 Per Share |
| Nuvama Wealth Management Limited | Interim Dividend - Rs 70 Per Share |
| Saregama India Limited | Interim Dividend - Rs 4.50 Per Share |
| Siyaram Silk Mills Limited | Interim Dividend - Rs 4 Per Share |

(Source: NSE)

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