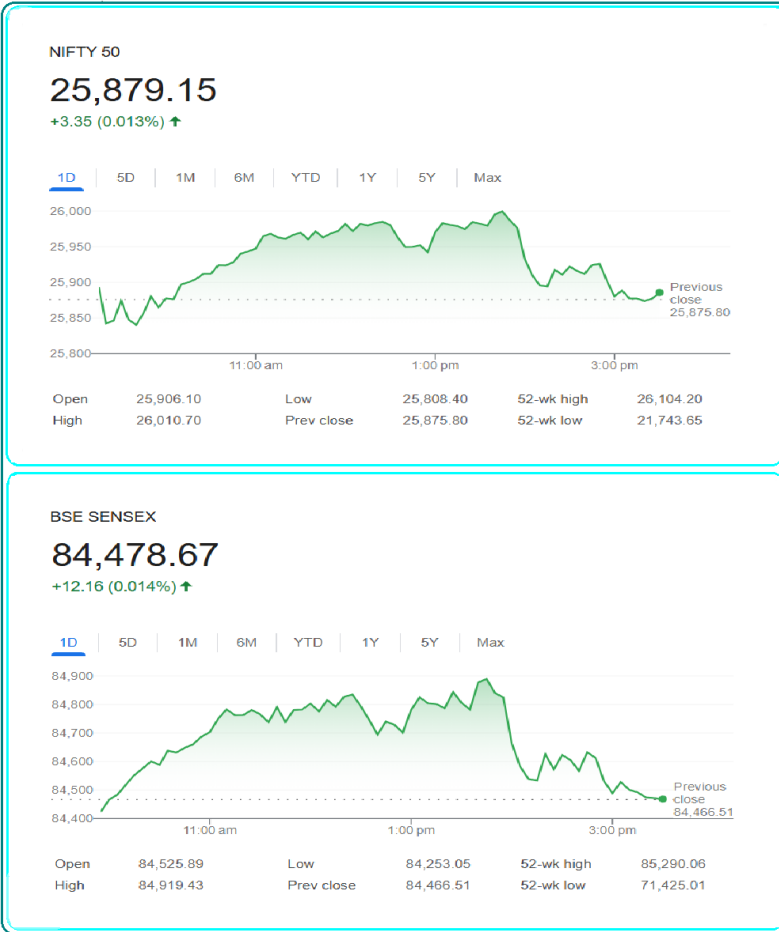


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25879.15	25875.80	0.01%
S&P BSE SENSEX	84478.67	84466.51	0.01%
NIFTY MID100	60692.05	60902.30	-0.35%
NIFTY SML100	18183.65	18250.45	-0.37%

(Source: [NSE](#), [BSE](#))

Market Wrap Up

- The domestic equity benchmarks ended with near the flatline with some positive points today, extending their winning streak to the fourth consecutive session. The Nifty settled above the 25,850 mark. Sentiment remained supported as India's retail inflation eased to a record low of 0.25% in October, strengthening expectations of a Reserve Bank rate cut next month.
- The S&P BSE Sensex added 12.16 points or 0.01% to 84,478.67. The Nifty 50 index rose 3.35 points or 0.01% to 25,879.15. In four consecutive trading sessions, the Sensex rose 1.51% while the Nifty added 1.51%.
- The S&P BSE Mid-Cap index shed 0.34% and the S&P BSE Small-Cap index fell 0.30%.
- Among the sectoral indices, the Nifty Metal index (up 0.44%), the Nifty Realty index (up 0.42%) and the Nifty Pharma index (up 0.41%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 0.68%), the Nifty Media index (down 0.55%) and the Nifty FMCG index (down 0.51%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed an unwinding of **long** position. Open Interest has been decreased by **1160** contracts at the end of the day.
- Long** position build up for the **November** series has been witnessed in **ICICIBANK**, **VEDL**, **HCLTECH**.
- Short** position build up for the **November** series has been witnessed in **INFY**, **BAJFINANCE**.
- Unwinding** position for the **November** series has been witnessed in **RELIANCE**, **SBIN**, **HDFCBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	58381.95	58274.65	0.18%
NIFTY AUTO	27382.80	27485.15	-0.37%
NIFTY FMCG	55243.50	55529.20	-0.51%
NIFTY IT	36679.45	36855.40	-0.48%
NIFTY METAL	10588.60	10542.55	0.44%
NIFTY PHARMA	22686.80	22593.40	0.41%
NIFTY REALTY	941.90	937.95	0.42%
BSE CG	70665.82	71167.22	-0.70%
BSE CD	62072.96	61543.65	0.86%
BSE Oil & GAS	29024.59	29079.04	-0.19%
BSE POWER	6710.82	6712.12	-0.02%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	51281.83	51063.31	0.43%
HANG SENG	27073.03	26922.73	0.56%
STRAITS TIMES	4575.91	4568.91	0.15%
SHANGHAI	4029.50	4000.14	0.73%
KOSPI	4170.63	4150.39	0.49%
JAKARTA	8372.00	8388.57	-0.20%
TAIWAN	27903.56	27947.09	-0.16%
KLSE COMPOSITE	1632.27	1631.61	0.04%
ALL ORDINARIES	9034.50	9079.40	-0.49%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	110637.50	115992.45
NSE F&O	160673.90	162980.87

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	383.68

(Source: [NSE](#))

Corporate News

- **Asian Paints** posted consolidated net profit climbed 43.04% to Rs 993.59 crore on 6.38% increase in revenue from sales to Rs 8,513.70 crore in Q2 FY26 over Q2 FY25.
- **Tata Steel** posted a whopping 319% y-o-y growth in its net profit for the September quarter: The company posted a whopping 319% y-o-y growth in its net profit for the September quarter at Rs. 3,183 Crore. It logged a marginal growth of 8.90% in its revenue for the quarter under consideration at Rs. 58,689 Crore.
- **Lupin** has commissioned a new oncology block at its Vizag manufacturing plant. This dedicated unit will boost contract development and manufacturing services for high-potent active pharmaceutical ingredients. The facility supports clients throughout the oncology drug development lifecycle. It integrates process development and quality control labs for efficient operations.
- **NTPC** inked two agreements in the healthcare sector in Assam to build a burn ICU at Kokrajhar Medical College and Hospital, and provide nutritional support to TB patients.
- **Vedanta** said that pending claims worth Rs. 16,700 Crore could be affected by this restructuring, 3,183 Crore. It logged a marginal growth of 8.90% in its revenue for the quarter under consideration at Rs. 58,689 Crore.
- **Ashok Leyland** reported a marginal rise in standalone net profit to Rs 771.06 crore in Q2 FY26, compared to Rs 770.10 crore posted in Q2 FY25. Revenue from operations jumped 9.34% year-on-year (YoY) to Rs 9,588.18 crore for the quarter ended 30 September 2025.
- **Oil and Natural Gas Corporation** said the force majeure on its Mozambique LNG project has been lifted following a significant improvement in the security situation at the site.
- **Mahindra & Mahindra** and Manulife have agreed to form a 50:50 life insurance joint venture, pending regulatory approval. This partnership aims to enhance financial wellbeing in India by leveraging Mahindra's rural reach and Manulife's urban agency expertise. The venture will offer tailored savings and protection solutions, aspiring to

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	2879.40	2769.80	3.96%
HINDALCO	811.95	794.40	2.21%
ICICIBANK	1385.90	1358.90	1.99%
INDIGO	5905.50	5795.50	1.90%
LT	4002.50	3954.60	1.21%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ETERNAL	297.75	308.80	-3.58%
M&M	3699.50	3754.30	-1.46%
ONGC	250.85	253.85	-1.18%
BEL	419.80	424.75	-1.17%
TRENT	4326.40	4375.80	-1.13%

(Source: [Moneycontrol](#))

- **Inox Wind** has secured a significant 100 MW equipment supply order for projects in Gujarat. This new order from a leading green energy transition platform includes supplying 3.3 MW turbines.
- **Juniper Green Energy** has secured a significant deal with Gujarat Urja Vikas Nigam Limited. A 50 megawatt wind energy project will be developed in Gujarat. Power supply is slated to begin from November 6, 2027.
- **Alembic Pharmaceuticals** announced that it has received final approval from the US Food and Drug Administration (USFDA) for its Abbreviated New Drug Application (ANDA) for Dextansoprazole Delayed-Release Capsules.
- **Inox Wind** announced that it has secured a 100 MW equipment supply order from a leading green energy transition platform.

be the leading life insurer for rural and semi-urban India.

- **Biocon** is exploring merging its biosimilars arm, Biocon Biologics, with itself, potentially valuing the unit at \$4.5 billion. The company is in advanced talks with minority investors for a share swap, considering various value creation options including an IPO or merger. This move aims to address acquisition-related debt and unlock shareholder value.
- **Alkem Laboratories** posted consolidated net profit rose 11.10% to Rs 765.06 crore in the quarter ended September 2025 as against Rs 688.64 crore during the previous quarter ended September 2024. Sales rose 17.17% to Rs 4000.99 crore in the quarter ended September 2025 as against Rs 3414.67 crore during the previous quarter ended September 2024.
- **IRCTC** reported a 11% y-o-y uptick in its net profit for the quarter ended September 2025. It posted a net profit of Rs. 342 Crore. Revenue came in higher by 7.7% to Rs. 1,146 Crore.
- **Cochin Shipyard** said that its net profit for Q2 FY26 was down by 43% on a year-on-year basis to Rs. 107.50 Crore. Revenue also slipped by 2.2% to Rs. 1,118.50 Crore.
- **Nazara Technologies** registered net profit for Q2 FY26 at Rs. 885 Crore. Revenue came in 65% y-o-y higher at Rs. 526.50 Crore.
- **Deepak Nitrite's** consolidated net profit declined 38.86% to Rs 118.71 crore on 6.40% decrease in revenue from operations to Rs 1,901.89 crore in Q2 FY26 over Q2 FY25.
- **H.G. Infra Engineering** reported a 35.77% decline in consolidated net profit to Rs 51.84 crore on a 1.31% increase in revenue from operations to Rs 917.98 crore in Q2 FY26 over Q2 FY25.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- China's new yuan loans dropped sharply to CNY 220 billion in October 2025, down from CNY 1290 billion in September and CNY 500 billion in the same month last year. Total social financing decreased to CNY 810 billion from CNY 3530 billion in September. Loan growth also slowed to 6.5% and 7.8% a year earlier. Money Supply M2 rose 8.2% year-on-year to CNY 335,105 billion in October 2025, following an 8.4% gain in September.
- U.K. economy expanded by just 0.1% in Q3 2025, easing from 0.3% growth in Q2. On an annual basis, GDP increased 1.3%. The monthly real GDP fell by 0.1% in September 2025, compared with August's zero growth.
- U.K. trade deficit narrowed to GBP 1.09 billion in September 2025, down from a downwardly revised GBP 1.28 billion in August.
- U.K. industrial production fell by 2% month-on-month in September 2025, reversing a downwardly revised 0.3% gain in the previous month. On a yearly basis, industrial activity decreased by 2.5% in September, following a downwardly revised 0.5% fall in August.
- U.K. manufacturing production in the UK fell by 1.7% month-over-month in September 2025, reversing a downwardly revised 0.6% increase in August. On a yearly basis, manufacturing production dropped by 2.2%, following a downwardly revised 0.7% fall in the previous month.
- Eurozone industrial production rose 0.2% month-on-month in September 2025, attempting to rebound from a revised 1.1% decline in August. On an annual basis, industrial output grew 1.2%, the same pace as in the previous month.
- Germany's current account surplus fell to EUR 18.6 billion in September 2025, down from EUR 21.7 billion in the same month a year earlier.
- France's unemployment rate rose slightly to 7.7% in Q3 2025, in line with market expectations and up from 7.6% in the previous quarter.
- Australia's seasonally adjusted unemployment rate declined to 4.3% in October 2025 from September's near four-year high of 4.5%. The number of unemployed people fell by 17,000 to 665,400 in October, down from 682,400 in September.
- Japan's producer prices rose 2.7% yoy in October 2025, easing slightly from a marginally revised 2.8% gain in September. On a monthly basis, prices increased 0.4%, just below forecasts of 0.5%.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 58.93/bbl (IST 17:00).
- INR weakened to Rs. 88.67 from Rs. 88.65 against each US\$ resulting in daily change of 0.02%.
- The government is set to launch a new Credit Guarantee Scheme for Exporters. This initiative will provide Rs 2,000 crore in funding. It aims to enable up to Rs 20,000 crore in additional credit for eligible exporters.
- India is projected to remain the G-20's fastest-growing economy, with Moody's forecasting 6.5% growth through 2027. Robust infrastructure, strong consumer demand, and export diversification are key drivers, enabling India to navigate U.S. tariffs by redirecting shipments. A neutral monetary policy and subdued inflation further support this resilience.
- The cabinet has given the green light to a financial package of Rs 45,060 crore aimed at bolstering exporters. A significant portion of this, specifically Rs 20,000 crore, will be allocated as credit guarantees on bank loans, making it easier for businesses to secure funding and boost their international trade efforts.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 14/11/2025

Tata Motors Passenger Vehicles Limited	Financial Results
Marico Limited	Financial Results
Siemens Limited	Financial Results
Ashoka Buildcon Limited	Financial Results
Engineers India Limited	Financial Results
Glenmark Pharmaceuticals Limited	Financial Results
Ahluwalia Contracts (India) Limited	Financial Results
Allcargo Logistics Limited	Financial Results
Alphageo (India) Limited	Financial Results
Archies Limited	Financial Results
Asian Hotels (East) Limited	Financial Results
Asian Hotels (North) Limited	Financial Results
Bajel Projects Limited	Financial Results
BASF India Limited	Financial Results
BGR Energy Systems Limited	Financial Results
Bharat Gears Limited	Financial Results
Bombay Burmah Trading Corporation Limited	Financial Results

Brainbees Solutions Limited	Financial Results
Deepak Builders & Engineers India Limited	Financial Results
Dreamfolks Services Limited	Financial Results
Easy Trip Planners Limited	Financial Results
EMS Limited	Financial Results
Exide Industries Limited	Financial Results
Geekay Wires Limited	Financial Results
GMR Power and Urban Infra Limited	Financial Results
Heranba Industries Limited	Financial Results
India Glycols Limited	Financial Results
India Nippon Electricals Limited	Financial Results
Ingersoll Rand (India) Limited	Financial Results/Dividend
Inox Green Energy Services Limited	Financial Results
Inox Wind Limited	Financial Results
JHS Svendgaard Laboratories Limited	Financial Results
Jindal Poly Films Limited	Financial Results
Johnson Controls - Hitachi Air Conditioning India Limited	Financial Results
K S Oils Limited	Financial Results
Kalyani Investment Company Limited	Financial Results
Kirloskar Industries Limited	Financial Results
Laxmi India Finance Limited	Financial Results
Lovable Lingerie Limited	Financial Results
Max Healthcare Institute Limited	Financial Results
Mcleod Russel India Limited	Financial Results
MM Forgings Limited	Financial Results
MRF Limited	Financial Results/Dividend
Narayana Hrudayalaya Ltd.	Financial Results
Natco Pharma Limited	Financial Results/Dividend
Nectar Lifesciences Limited	Financial Results
Prakash Pipes Limited	Financial Results
Rane Holdings Limited	Financial Results
Rashtriya Chemicals and Fertilizers Limited	Financial Results
Redtape Limited	Financial Results
Sadbhav Engineering Limited	Financial Results
Salasar Techno Engineering Limited	Financial Results
SKF India Limited	Financial Results
Speciality Restaurants Limited	Financial Results
Sreeleathers Limited	Financial Results
Sun TV Network Limited	Financial Results/Dividend

(Source: NSE)

Corporate Actions as on 14/11/2025

Bayer Cropscience Limited	Interim Dividend - Rs 90 Per Share
Infosys Limited	Buy Back
National Aluminium Company Limited	Interim Dividend - Rs 4 Per Share
Oil & Natural Gas Corporation Limited	Interim Dividend - Rs 6 Per Share
Petronet LNG Limited	Interim Dividend - Rs 7 Per Share
Allcargo Terminals Limited	Rights 3:19 @ Premium Rs 18/-
BIRLASOFT LIMITED	Interim Dividend - Rs 2.50 Per Share
D-Link (India) Limited	Interim Dividend - Rs 6 Per Share
Emami Limited	Interim Dividend - Rs 4 Per Share
Esab India Limited	Interim Dividend - Rs 25 Per Share
Ganesh Consumer Products Limited	Interim Dividend - Rs 2.50 Per Share
Garware Technical Fibres Limited	Interim Dividend - Rs 8 Per Share
GHCL Limited	Buy Back
JM Financial Limited	Interim Dividend - Rs 1.50 Per Share
KDDL Limited	Interim Dividend - Rs 15 Per Share
KPI Green Energy Limited	Interim Dividend - Rs 0.25 Per Share
MOIL Limited	Interim Dividend - Rs 1.80 Per Share
Pricol Limited	Interim Dividend - Rs 2 Per Share
RITES Limited	Interim Dividend - Rs 2 Per Share
Safari Industries (India) Limited	Interim Dividend - Rs 2 Per Share
SMC Global Securities Limited	Bonus 1:1
Veedol Corporation Limited	Interim Dividend - Rs 22 Per Share

(Source: NSE)

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