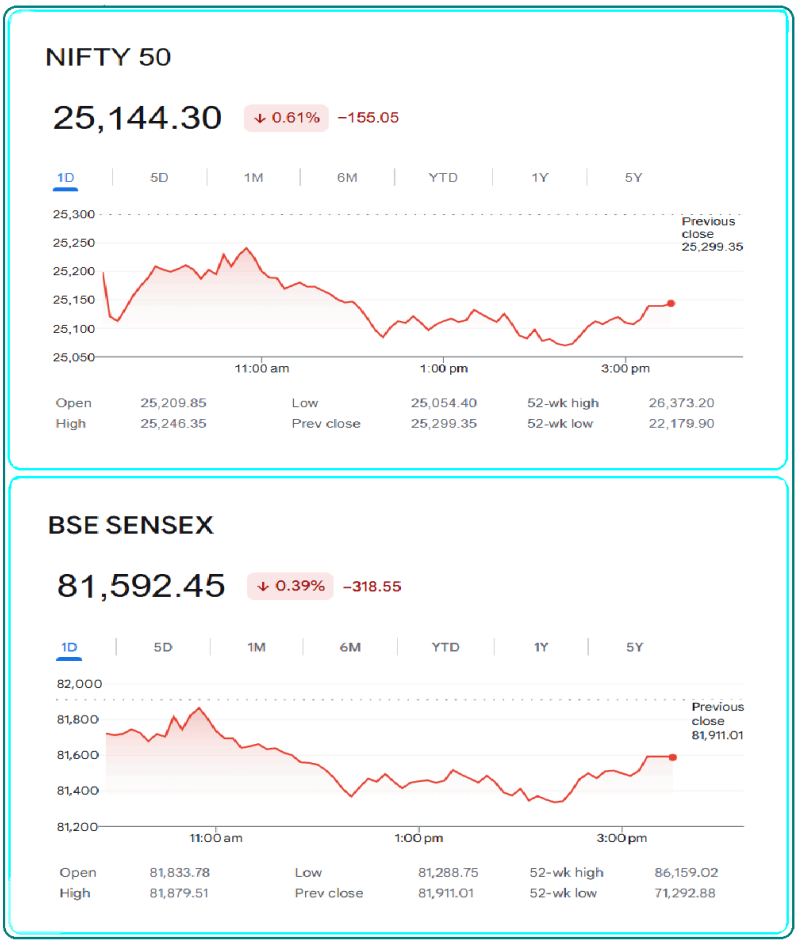
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

13th November 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25144.30	25299.35	**-0.61%**
S&P BSE SENSEX	81592.45	81911.01	**-0.39%**
NIFTY MID100	61889.50	62039.00	**-0.24%**
NIFTY SML100	19656.45	19706.75	**-0.26%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity benchmarks ended lower, snapping three-day winning streak, as investors remained cautious amid rising Brent crude prices, weakness in the rupee against the US dollar. Sentiment also remained fragile following Nvidia CEO Jensen Huang's sudden resignation, which renewed uncertainty over the artificial intelligence sector. The Nifty ended below 25,150 mark. All the sectoral indices on the NSE ended in red with realty, auto and metal shares declined the most.
- The S&P BSE Sensex declined 318.56 points or 0.39% to 81,59245. The Nifty 50 index dropped 155.05 points or 0.61% to 25,144.30. In the past three consecutive sessions, the Sensex and the Nifty jumped 1.25% and 1.21%, respectively. The Nifty MidCap 150 Index fell 0.35% and the Nifty SmallCap 250 Index tumble 0.30%.
- Among the sectoral indices, the Nifty Consumer Durables index (down 0.60%), the Nifty PSU Bank index (down 0.51%) and the Nifty Pharma index (down 0.49%) outperformed the Nifty 50 index. Meanwhile, the Nifty Realty index (down 1.39%), the Nifty Auto index (down 1.07%) and the Nifty Metal Index (down 0.98%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed an unwinding of **short** position. Open Interest has been decreased by **1178** contracts at the end of the day.
- **Long** position build up for the **November** series has been witnessed in **RELIANCE**, **BHARTIARTL**, **BAJFINANCE**.
- **Short** position build up for the **November** series has been witnessed in **SBIN**, **HDFCBANK**, **INFY**.
- **Unwinding** position for the **August** series has been witnessed in **ONGC**, **ICICIBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	61034.10	61518.50	**-0.79%**
NIFTY AUTO	27929.85	28231.00	**-1.07%**
NIFTY FMCG	46833.55	46838.50	**-0.01%**
NIFTY IT	31931.15	32163.55	**-0.72%**
NIFTY METAL	12647.90	12772.60	**-0.98%**
NIFTY PHARMA	28535.75	28675.75	**-0.49%**
NIFTY REALTY	921.25	934.25	**-1.39%**
BSE CG	72756.69	72262.27	**0.68%**
BSE CD	61979.99	62099.02	**-0.19%**
BSE Oil & GAS	26476.08	26677.83	**-0.76%**
BSE POWER	7211.51	7187.86	**0.33%**

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	61142.35	60819.36	**0.53%**
HANG SENG	23637.60	24008.55	**-1.55%**
STRAITS TIMES	5231.84	5282.70	**-0.96%**
SHANGHAI	3634.35	3655.83	**-0.59%**
KOSPI	5290.53	5342.73	**-0.98%**
JAKARTA	5344.41	5250.90	**1.78%**
TAIWAN	43675.12	43091.87	**1.35%**
KLSE COMPOSITE	1582.59	1585.96	**-0.21%**
All ORDINARIES	9204.50	9274.20	**-0.75%**

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	**120820.56**	131910.28
NSE F&O	**162215.77**	147581.95

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	**5736.55**
NET SELL	**-**

(Source: NSE)

Corporate News

- **Mahindra & Mahindra** recorded a 30.44% increase in production to 1,23,752 units in October 2026, compared with 94,873 units in October 2025. The auto major's total sales stood at 1,26,706 units in October 2026, registering a growth of 7.29% YoY compared with 1,18,097 units in October 2025, while exports rose 77.52% YoY to 7,241 units from 4,079 units in October 2025.

- **Hitachi Energy India** reported a 20.5% year-on-year increase in standalone net profit to Rs 318.5 crore in Q2 FY27. Sequentially, net profit increased 8.3% from Rs 294.2 crore in Q1 FY27. Revenue from operations surged 63.5% year on year to Rs 2,996.5 crore from Rs 1,832.6 crore. Sequentially, revenue grew 20.2% from Rs 2,493.7 crore.

- **Jindal Power Ltd.** has acquired a $470 million loan to fuel its ambitious power project in Botswana. The financing is backed by three Indian banks, alongside participation from international institutional lenders. This initiative aligns with Jindal's previous international expansion efforts and leverages Botswana's extensive coal resources, which are essential for catering to local electricity requirements.

- **Vodafone Idea** posted consolidated net loss of Rs 5,975 crore in Q2 FY27, compared with Rs 5,524 crore in the corresponding quarter last year.The loss also widened from Rs 3,754 crore in Q1 FY27. However, the company's loss adjusted for exceptional items narrowed marginally to Rs 5,513 crore from Rs 5,562 crore a year earlier. Revenue from operations increased 6.2% year on year to Rs 11,884 crore from Rs 11,195 crore. Sequentially, revenue grew 1.7% from Rs 11,689 crore in Q1 FY27.

- **Ola Electric Mobility** reported a 39% year-on-year decline in consolidated revenue from operations to Rs 421 crore in Q2 FY27. Revenue also declined 7.5% sequentially from Rs 455 crore in Q1 FY27.

- **Dilip Buildcon** reported a 52.80% decline in consolidated net profit to Rs 101 crore in Q2 FY27 as against Rs 214 crore in Q2 FY26. However, revenue from operations increased 16.84% year on year (YoY) to Rs 2,250 crore in Q2 FY27 from Rs 1,926 crore in Q2 FY26.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	7650.00	7549.00	**1.34%**
HINDUNILVR	1992.90	1974.00	**0.96%**
BSE	3937.70	3909.10	**0.73%**
ASIANPAINT	2550.00	2536.50	**0.53%**
BHARTIARTL	2106.00	2096.00	**0.48%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	970.00	1003.80	**-3.37%**
TMPV	287.40	297.25	**-3.31%**
GRASIM	3034.00	3114.90	**-2.60%**
HINDALCO	943.60	964.00	**-2.12%**
ADANIENT	2688.00	2741.50	**-1.95%**

(Source: Moneycontrol)

- **GAIL (India)** and Krishak Bharati Cooperative (KRIBHCO) have signed a Memorandum of Understanding (MoU) to explore setting up a gas-based urea manufacturing facility at Mulapeta in Srikakulam district, Andhra Pradesh.
- **NBCC (India)** announced that it has signed Memorandums of Understanding (MoUs) with the Department of Urban Development & Municipal Affairs, Government of West Bengal, and its various authorities to undertake multiple projects across the state.
- **Zydus Lifesciences Ltd** said it has completed the transaction to subscribe to a 50 per cent stake in Zydus Sunshine Lifesciences Pvt Ltd, making it a 50:50 joint venture alongside Sunshine Healthcare Lanka Limited.
- **Lupin Ltd** has partnered with Sandoz to launch RanluspecTM, a biosimilar for Ranibizumab, across Europe. This launch will help to improve access to treatments for retinal and choroidal vascular diseases. The European Commission previously approved RanluspecTM in vial and syringe-filled presentations for medical use. The biosimilar targets conditions such as wet age-related macular degeneration and diabetic macular edema.
- **Godrej Properties Ltd** has acquired a 31-acre land parcel in Indore for a residential development project. This acquisition will increase the company's presence in the booming Indore property market, where demand is high. The planned development is expected to have a saleable area of approximately 0.7 million square feet. Godrej Properties already has two projects in Indore at advanced stages of completion.
- Peddar Realty, a wholly-owned subsidiary of **JSW Steel**, has incorporated a wholly-owned subsidiary in the name and style of Acre Point Developers (APDPL) on 12 November 2026. Accordingly, APDPL has become a step-down wholly owned subsidiary of the Company with effect from that date.

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

Global News

- China’s current account surplus widened to $276.1 billion in the third quarter of 2026, up from $202.5 billion in the same period last year.
- China's new yuan loans extended by Chinese banks fell by a net CNY 100 billion in October 2026, swinging from a positive CNY 220 billion last year. The value of loans increased 4.7% in October of 2026 over the same month in the previous year. Total social financing jumped to CNY 1.15 trillion from CNY 810 billion in the previous year. M2 money supply rose 7.2% year-on-year to a record high of CNY 359.629 trillion in September 2026.
- U.S. initial jobless claims climbed to 200,000 in the week ended November 7th, an increase of 9,000 from the previous

week's revised level of 191,000. Continuing claims fell by 13,000 to 1,679,000 in the last week of October.

- U.S. existing home sales fell 5.5% to a seasonally adjusted annual rate of 3.75 million units in October 2026.
- U.S. government budget deficit widened to $404 billion in October 2026 from $284 billion a year earlier.
- Eurozone economy grew by 0.4% in Q3 2026, slowing from a 0.6% expansion in Q2. The GDP expanded by 1.3% year-on-year in the third quarter of 2026, the fastest pace in over a year, following 1.2% growth in the second quarter.
- Eurozone recorded a EUR 10.3 billion trade deficit in goods in September 2026, reversing a EUR 13.5 billion surplus in the same month of 2025.
- Germany's wholesale prices rose 8.8% year-on-year in October 2026, following a 8.7% gain in the previous month. On a monthly basis, wholesale prices increased 0.4%, much slower than 1.9% in September.
- Germany's current account surplus increased to EUR 18.7 billion in September 2026, up from EUR 15.7 billion a year earlier.
- French annual inflation rate in France rose to 3.4% in October 2026, picking up from 3.1% in September. On a monthly basis, consumer prices rose 0.4%, rebounding from a 0.3% decline in September.

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

Economic News

- Crude Oil traded at US$ 88.25/bbl (IST 17:00).
- INR weakened to Rs. 94.25 from Rs. 94.05 against each US$ resulting in daily change of 0.21%.
- Domestic passenger vehicle sales rose 12.4% year-on-year to 5,19,060 units in October 2026, marking the segment's strongest-ever performance for the month, as per SIAM. Passenger vehicle sales stood at 4,61,614 units in October 2025. The overall production of passenger vehicles, three-wheelers, two-wheelers and quadricycles stood at 36,18,753 units during the month. Passenger Vehicles recorded sales of 5.19 lakh units with a growth of 12.4%, while Two-Wheeler sales reached 25.78 lakh units, registering a growth of 16.1% compared to October 2025. Three-Wheeler sales stood at 1.03 lakh units, growing by 25.7% over the same period last year. Three-wheeler sales rose 25.7% year-on-year to 1,03,349 units in October, compared with 82,190 units a year earlier. Passenger carriers accounted for 86,218 units of three-wheeler sales, up 26.9% from 67,943 units in October 2025. Goods carriers rose 27.4% to 15,465 units from 12,136 units. Sales of e-rickshaws declined 22.3% to 1,178 units, while e-cart sales fell 17.8% to 488 units. Two-wheeler sales increased 16.1% to 25,77,810 units in October from 22,20,345 units in the same month last year. Scooter sales rose 31.6% to 10,96,756 units, while motorcycle sales increased 6.6% to 14,23,118 units. Moped sales grew 13% to 57,936 units.
- India's merchandise trade deficit widened to $39.88 billion in October, increased from $30.21 billion in September and was higher than the $33 billion recorded in October 2025. Exports rose to $49.47 billion from $44.40 billion in September, while imports increased to $89.35 billion from $74.61 billion.
- India's gem and jewellery sector witnessed a robust increase of 34.01% in October, totaling $2.92 billion, as compared to the previous year.

- NHC Foods, an exporter of agricultural commodities and spices, reported a sharp improvement in financial performance for the September quarter, with total income rising 333 per cent year-on-year to Rs 451.32 crore and profit surging more than 16-fold to Rs 21.68 crore. The company had reported total income of Rs 104.09 crore and profit of Rs 1.34 crore in the corresponding quarter of the previous financial year.

- India's ambitious push to expand domestic manufacturing through production-linked incentives (PLI) is struggling to deliver on one of its key promises: job creation, with the programme achieving just 28% of its employment target despite making considerably more progress on investment and production. The PLI schemes, rolled out across 14 sectors ranging from mobile phones and textiles to automobile components, have achieved 76% of their investment target and 64% of their production goal, according to an assessment by government think tank NITI Aayog. The employment achievement, however, stands at just 28% of the target, even as the schemes have crossed the halfway mark of their combined implementation period.

- India was the second-largest buyer of Russian fossil fuels in October, purchasing hydrocarbons worth €6.4 billion, according to a monthly analysis by the Centre for Research on Energy and Clean Air (CREA). It was India's highest monthly total in data going back to January 2022. Crude oil accounted for 91% of India's purchases at €5.8 billion. Coal imports were worth €333 million, while oil products accounted for €232 million.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 14/11/2026

Ashok Leyland Limited	Financial Results/Dividend
Asian Hotels (West) Limited	Financial Results
Aarey Drugs & Pharmaceuticals Limited	Financial Results
Aarti Surfactants Limited	Financial Results
Aditya Birla Money Limited	Fund Raising
Affordable Robotic & Automation Limited	Financial Results
Ahluwalia Contracts (India) Limited	Financial Results
Allcargo Global Limited	Financial Results
Archies Limited	Financial Results
Baazar Style Retail Limited	Financial Results
Balu Forge Industries Limited	Financial Results/Fund Raising
Behari Lal Engineering Limited	Financial Results
BGR Energy Systems Limited	Financial Results
Bharat Road Network Limited	Financial Results
Brainbees Solutions Limited	Financial Results
Cheviot Company Limited	Financial Results
DEE Development Engineers Limited	Financial Results
Easy Trip Planners Limited	Financial Results
Genus Power Infrastructures Limited	Financial Results

GRM Overseas Limited	Financial Results
Gujarat Apollo Industries Limited	Financial Results
Hero Motors Limited	Financial Results
Himatsingka Seide Limited	Financial Results
ICSA (India) Limited	Financial Results
Jamna Auto Industries Limited	Financial Results/Dividend
Jindal Poly Films Limited	Financial Results
Kaynes Technology India Limited	Financial Results
Kernex Microsystems (India) Limited	Financial Results
Lovable Lingerie Limited	Financial Results
Maan Aluminium Limited	Financial Results
Mcleod Russel India Limited	Financial Results
Motisons Jewellers Limited	Financial Results
Nectar Lifesciences Limited	Financial Results
Nitin Fire Protection Industries Limited	Financial Results
Panacea Biotec Limited	Financial Results
Patanjali Foods Limited	Financial Results
Prudential Sugar Corporation Limited	Financial Results
PTC Industries Limited	Financial Results
Rajesh Exports Limited	Financial Results
Salasar Techno Engineering Limited	Financial Results
Sammaan Capital Limited	Financial Results
Supreme Engineering Limited	Financial Results
Swaraj Suiting Limited	Financial Results
Tolins Tyres Limited	Financial Results
TVS Srichakra Limited	Financial Results
Udayshivakumar Infra Limited	Financial Results
Vikram Solar Limited	Financial Results
Zee Media Corporation Limited	Financial Results

Board Meetings as on 16/11/2026

Sandhar Technologies Limited	Financial Results

(Source: NSE)

Corporate Actions as on 16/11/2026

Cochin Shipyard Limited	Interim Dividend - Rs 3 Per Share
Shipping Corporation Of India Limited	Interim Dividend - Rs 4 Per Share

(Source: NSE)

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