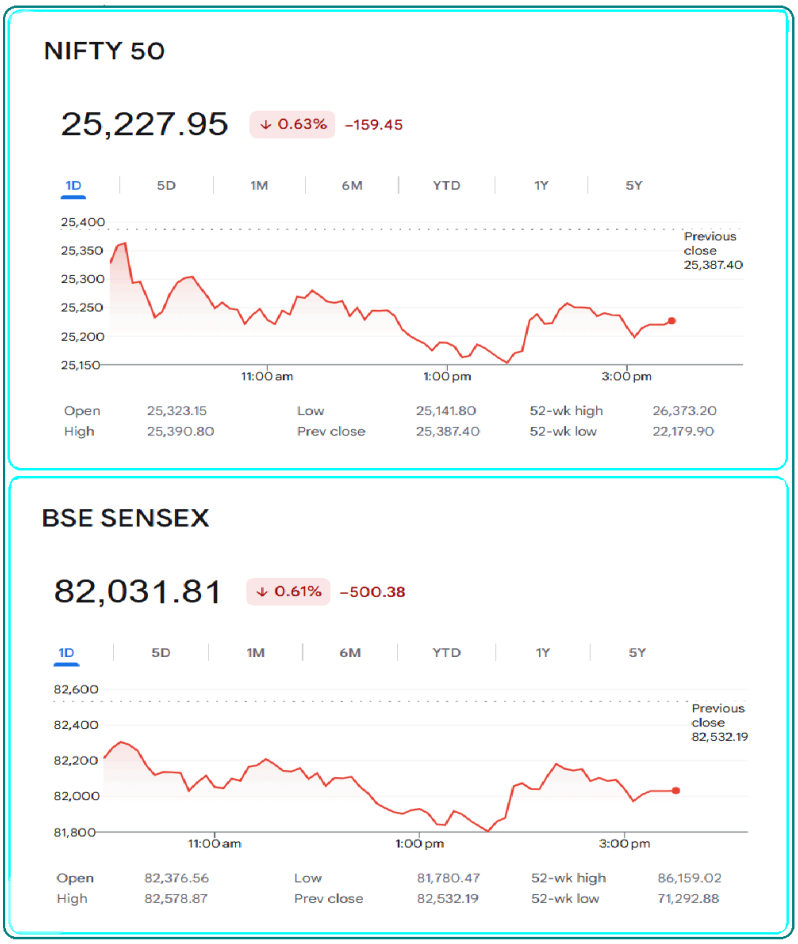
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

18th November 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25227.95	25387.40	**-0.63%**
S&P BSE SENSEX	82031.81	82532.19	**-0.61%**
NIFTY MID100	60979.35	61730.00	**-1.22%**
NIFTY SML100	19331.60	19398.70	**-0.35%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity benchmarks ended with modest losses, snapping a two-session winning streak as investors resorted to profit booking amid a lack of clear directional cues. Market participants remained focused on stock-specific developments, while easing crude oil prices failed to lift overall sentiment. The Nifty settled below the 25,250 mark.
- The S&P BSE Sensex tanked 500.38 points or 0.61% to 82,031.81. The Nifty 50 index lost 159.45 points or 0.63% to 25,227.95. In the past two trading sessions, the Sensex and Nifty jumped 1.15% and 0.97%, respectively.
- The Nifty MidCap 150 Index declined 1.14% and the Nifty SmallCap 250 Index shed 0.49%.
- Among the sectoral indices, the Nifty PSU Bank index (up 0.59%), the Nifty Media index (up 0.46%) and the Nifty Pharma index (up 0.15%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (down 3.13%), the Nifty Metal index (down 2.46%) and the Nifty IT index (down 1.24%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **2312** contracts at the end of the day.
- **Long** position build up for the **November** series has been witnessed in **SBIN**, **ITC**, **TRENT**.
- **Short** position build up for the **November** series has been witnessed in **RELIANCE**, **LT**, **ICICIBANK**, **INFY**.
- **Unwinding** position for the **November** series has been witnessed in **BHARTIARTL**, **HDFCBANK**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	62038.65	62273.25	-0.38%
NIFTY AUTO	27394.95	27769.15	-1.35%
NIFTY FMCG	47569.10	47611.60	-0.09%
NIFTY IT	31262.30	31654.10	-1.24%
NIFTY METAL	12222.30	12530.30	-2.46%
NIFTY PHARMA	28200.50	28157.10	0.15%
NIFTY REALTY	918.65	926.50	-0.85%
BSE CG	69906.63	70839.48	-1.32%
BSE CD	60677.75	62644.58	-3.14%
BSE Oil & GAS	26629.45	26655.83	-0.10%
BSE POWER	7088.52	7149.92	-0.86%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	59024.28	58860.43	0.28%
HANG SENG	23294.75	23508.17	-0.91%
STRAITS TIMES	5054.89	5109.13	-1.06%
SHANGHAI	3587.83	3584.58	0.09%
KOSPI	5067.44	4968.48	1.99%
JAKARTA	5247.88	5304.76	-1.07%
TAIWAN	40194.91	40092.11	0.26%
KLSE COMPOSITE	1566.73	1575.15	-0.53%
All ORDINARIES	8932.40	8997.30	-0.72%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	108341.97	121025.07
NSE F&O	345326.37	232264.26

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	5866.78
NET SELL	-

(Source: NSE)

Corporate News

- **Oil and Natural Gas Corporation** said it had successfully stopped the gas leak at a well in Andhra Pradesh's Konaseema district after nearly 10 hours of operations. The incident had led to the evacuation of nearby residents, diversion of traffic and a temporary power shutdown as a safety measure.

- The Supreme Court stayed the South Delhi Municipal Corporation's Rs. 197 crore municipal electricity tax demand raised against the **NTPC** for the consumption of self-generated power at its Badarpur Thermal Power Station between 2006 and 2008. The stay was granted subject to NTPC depositing the principal amount of Rs. 82 crore with the court within two weeks.

- **Reliance Consumer Products Ltd** broke ground for its Rs 1,600 crore Campa Cola beverage manufacturing plant at the Mulawad industrial area in Vijayapura, in what the state government sees as a major boost to industrialisation in the north Karnataka region.

- **Adani Airport Holdings** has launched an upgraded rewards membership programme across eight airports, offering passengers benefits worth up to Rs 65,000 annually. Integrated with Adani OneApp, the tier-based scheme combines travel, shopping, dining and lounge privileges as the company looks to boost digital transactions and non-aeronautical revenue.

- **JSW Energy** announced that its subsidiaries namely JSW Vayu (Tungabhadra), JSW Vayu (Indravati) , JSW Wind Power (Pennar) and JSW Wind had filed appeal before the Hon'ble Appellate Tribunal for Electricity (APTEL) against the Andhra Pradesh Electricity Regulatory Commission (APERC) order dated 18 October 2023 which directed AP Discom to pay Rs. 0.50 per unit for energy supplied beyond the prescribed Capacity Utilization Factor (CUF).

- **Puravankara** announced that it has launched Purva Cityspire, a residential township in Edappally, Kochi, with an estimated gross development value (GDV) of Rs 2,000 crore.

- **Adani Cement** flagged off Heavy-Duty Electric Trucks at its Sanghi Plant in Gujarat. This is the first-ever deployment of EV trucks by Adani Cement and a defining milestone in the company's sustainability and green

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SBIN	1135.00	1108.60	**2.38%**
CIPLA	1417.00	1388.00	**2.09%**
TATACONSUM	1130.90	1112.40	**1.66%**
APOLLOHOSP	8821.00	8712.50	**1.25%**
ITC	296.60	293.30	**1.13%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TITAN	4648.10	4908.00	**-5.30%**
HDFCLIFE	575.50	595.05	**-3.29%**
HINDALCO	900.00	927.75	**-2.99%**
BSE	3755.70	3864.90	**-2.83%**
TMPV	252.55	259.20	**-2.57%**

(Source: Moneycontrol)

- **Advait Energy Transitions** secured an order worth Rs 130.49 crore, including taxes, from Gujarat Energy Transmission Corporation (GETCO).
- **Glenmark Pharmaceuticals**'s joint venture (JV), Ichnos Glenmark Innovation submitted Investigational New Drug (IND) application to the U.S. Food and Drug Administration (USFDA) for ISB 2301.
- **Biocon** said that the European Commission (EC) granted marketing authorisation to its pertuzumab biosimilar, Pebrilzo, for treating HER2-positive breast cancer across multiple disease stages in the European Union.
- **Ashoka Buildcon** received lowest bidder (L1) status from National Highway Authority of India (NHAI) for construction of Vadodara - Mumbai Expressway in Gujarat. The said project is worth Rs 1,465 crore.
- **ACME Solar Holdings**, through its wholly owned subsidiary ACME Greentech Seventh, has commissioned an additional 52.32 MW/209.28 MWh BESS capacity at its 300 MW/1,200 MWh FDRE project in Bikaner, Rajasthan.
- **Sigma Advanced Systems** announced a strategic joint venture with Spain-based Escribano Mechanical & Engineering (EM&E Group) to develop advance defence systems in India.

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

Global News

- U.S. retail sales rose 0.2% in October 2026, slowing from September's gasoline-fueled 0.8% advance. Core retail sales rose 0.6% month-on-month in October 2026, easing from an upwardly revised 1.1% increase in the previous month.
- U.S. industrial production in the US decreased 0.4% month-over-month in October 2026, after a 0.7% rise in September. Manufacturing output rose by 0.3% for a second month in October of 2026.
- U.S. export prices rose 1.1% in October, following a 2.4% increase in September while import prices rose by 1.1% from the previous month in October, matching September's pace.
- U.S. business inventories rose by 0.5% month-over-month in September 2026, following a 0.4% increase in August.
- U.K.'s annual inflation rate rose to 3.6% in October 2026, its highest level in exactly a year, picking up from 3.5% in September. Core CPI inflation was unchanged at 2.8% and services inflation remained at 3.7%. On a monthly basis, consumer prices rose 0.5%, following a 0.4% increase in September while core consumer prices rose 0.3%, accelerating from a 0.2% increase in September.
- U.K. factory gate prices climbed 5.1% year-on-year in October 2026, accelerating from an upwardly revised 4.7% gain in

September. On a monthly basis, factory gate prices increased by 0.4%, easing from a 0.8% rise in September.

- Eurozone annual inflation accelerated to 4.0% in October 2026. Core inflation was revised slightly higher to 2.6% from the preliminary estimate of 2.5%, marking its highest level since May.
- Japan's trade deficit widened to JPY 476.5 billion in October 2026 from JPY 301.9 billion in the same month a year earlier. Imports rose 21.6% yoy to a new record JPY 12,245.3 billion, accelerating from September's four-month low of 18.5% gain while exports grew 20.5% to a fresh peak of JPY 11,768.8 billion.

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

Economic News

- Crude Oil traded at US$ 84.89/bbl (IST 17:00).
- INR strengthened to Rs. 93.45 from Rs. 93.48 against each US$ resulting in daily change of 0.03%.
- India's economy is predicted to grow by 7.6% in the July-September quarter according to economists. Consumer demand has shown resilience, mitigating the effects of rising inflation pressures. Predictions indicate continued strength from passenger vehicle sales and bank credit growth. Despite potential slowdowns in the second half of the fiscal year, investments are expected to improve. The Reserve Bank of India may raise rates as economic conditions evolve.
- The Central Board of Indirect Taxes and Customs plans to introduce a draft framework for taxpayers. The framework will cover around 70 lakh GST-registered taxpayers and will differentiate between large and small taxpayers. Large businesses will access centralised services from one office, while smaller taxpayers will receive faceless assistance. This new approach aims to streamline administrative processes and reduce the burden of multiple interactions.
- India and the Philippines on Tuesday discussed ways to strengthen bilateral cooperation in defence, security, trade and investment as Prime Minister Narendra Modi met Philippine President Ferdinand R. Marcos Jr. in Manila on the sidelines of the ASEAN Summit.
- India's shrimp export revenues are projected to rise by 10-12% this fiscal year as demand recovers. Export volumes should increase by 4-6%, while average realisations are likely to improve by 5-6%. Shrimp exports to the US are expected to recover, contributing significantly to growth opportunities. Higher demand from markets like Russia, China, and Japan will also support this recovery.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 19/11/2026

Antarctica Limited	Financial Results
Muthoot Microfin Limited	Financial Results

(Source: NSE)

Corporate Actions as on 19/11/2026

Ingersoll Rand (India) Limited	Interim Dividend - Rs 20 Per Share
Natco Pharma Limited	Interim Dividend - Rs 1.25 Per Share
Vibrant Global Capital Limited	Interim Dividend - Re 1 Per Share

(Source: NSE)

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