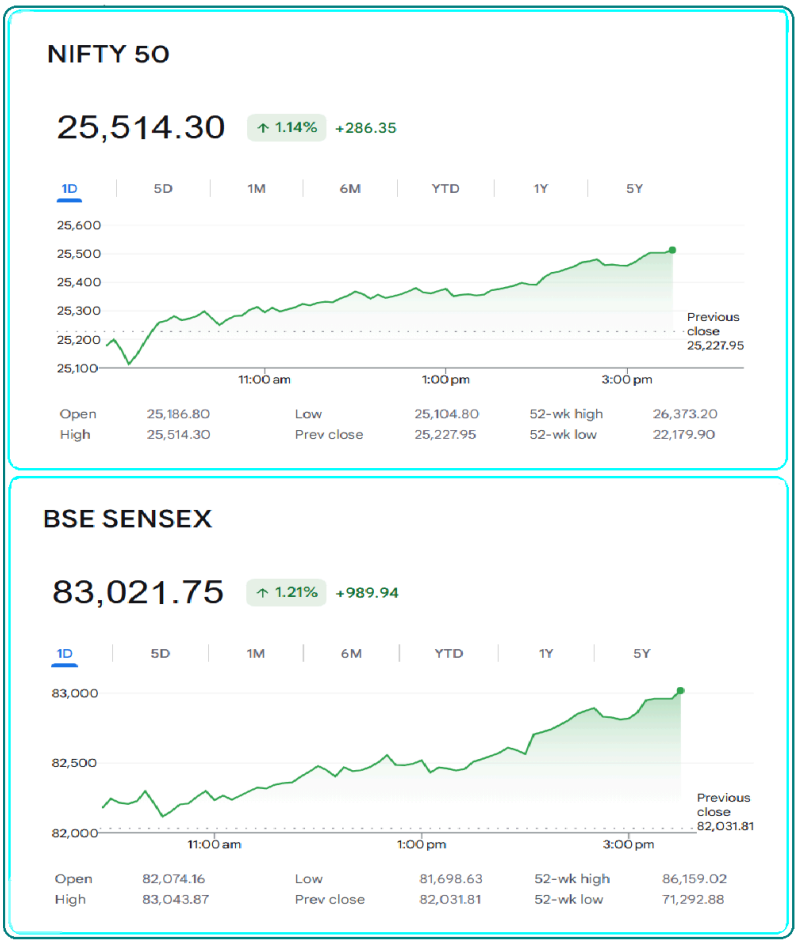
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

19th November 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25514.30	25227.95	**1.14%**
S&P BSE SENSEX	83021.75	82031.81	**1.21%**
NIFTY MID100	61624.40	60979.35	**1.06%**
NIFTY SML100	19468.40	19331.60	**0.71%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity benchmarks ended with major gains, supported by sustained foreign institutional investor (FII) inflows and easing commodity prices. Investors largely overlooked the hawkish tone of the US Federal Reserve's latest policy meeting minutes. The Nifty settled above the 25,500 level, while the Sensex crossed 83,000 mark. Meanwhile, the Nifty Bank scaled a fresh all-time high of 63,063.00 in intraday today.
- The S&P BSE Sensex advanced 989.94 points or 1.21% to 83,021.75. The Nifty 50 index rose 286.35 points or 1.14% to 25,514.30.
- The Nifty MidCap 150 Index added 1% and the Nifty SmallCap 250 Index rose 0.77%.
- Among the sectoral indices, the Nifty Auto index (up 4.40%), the Nifty Consumer Durables index (up 3.64%) and the Nifty PSU Bank index (up 2.29%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty IT index (down 1.10%), the Nifty Media index (up 0.17%) and the Nifty Realty index (up 0.48%) 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 **9491** contracts at the end of the day.
- **Long** position build up for the **November** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **ICICIBANK**.
- **Short** position build up for the **November** series has been witnessed in **INFY**, **POWERINDIA**.
- **Unwinding** position for the **November** series has been witnessed in **HDFCBANK**, **HCLTECH**, **WIPRO**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	63063.00	62038.65	1.65%
NIFTY AUTO	28601.30	27394.95	4.40%
NIFTY FMCG	48564.25	47569.10	2.09%
NIFTY IT	30919.45	31262.30	-1.10%
NIFTY METAL	12299.75	12222.30	0.63%
NIFTY PHARMA	28371.80	28200.50	0.61%
NIFTY REALTY	923.10	918.65	0.48%
BSE CG	71143.28	69906.63	1.77%
BSE CD	62063.61	60677.75	2.28%
BSE Oil & GAS	26854.23	26629.45	0.84%
BSE POWER	7211.76	7088.52	1.74%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	59444.21	59024.28	0.71%
HANG SENG	22841.62	23294.75	-1.95%
STRAITS TIMES	5079.49	5054.89	0.49%
SHANGHAI	3577.62	3587.83	-0.28%
KOSPI	5137.89	5067.44	1.39%
JAKARTA	5194.14	5247.88	-1.02%
TAIWAN	38426.89	40194.91	-4.40%
KLSE COMPOSITE	1566.16	1566.73	-0.04%
All ORDINARIES	8836.60	8932.40	-1.07%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	122515.43	108341.97
NSE F&O	412246.36	345326.37

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	7411.41
NET SELL	-

(Source: NSE)

Corporate News

- **Alkem Laboratories** announced that the US FDA has issued a warning letter dated November 18, 2026 for Company's manufacturing facility located at Amaliya, Daman. The Company shall be responding to the US FDA within stipulated timeline.
- **Arvind Fashions**'s flagship brand, U.S. Polo Assn., reported high-teens growth in India, reflecting strong consumer demand and its established position in the country's casualwear market.
- **Tonbo Imaging India** has received an order from the Ministry of Defence, Government of India, for the supply of its clip-on thermal weapon sights and associated support equipment.
- **Bank of Maharashtra** revised its Marginal Cost of Funds Based Lending Rates (MCLR), effective 18 November 2026. The overnight MCLR was increased by 80 basis points to 7.75% from 6.95%. The one-month MCLR was raised by 50 basis points to 8.30% from 7.80%. The three-month MCLR was increased by 25 basis points to 8.60% from 8.35%, while the six-month rate was raised by 20 basis points to 8.85% from 8.65%. The one-year MCLR remained unchanged at 9.05%. All revised lending rates are on an annual basis.
- **LT Foods** announced that its US subsidiary, LT Foods Americas Inc., had entered into an agreement to acquire MK Foods Holdings Inc., a US-based packaged foods company.
- **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.
- **NDR Auto Components** signed a joint venture agreement (JVA) with South Korea-based DYA Co. to manufacture and supply passenger car seats in India.
- **Cyient Semiconductors** said it had approved a $10 million strategic equity investment from GlobalFoundries at a pre-money equity valuation of $490 million.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MARUTI	13589.00	12632.00	**7.58%**
EICHERMOT	8058.50	7700.00	**4.66%**
M&M	3509.00	3359.10	**4.46%**
TMPV	263.50	252.55	**4.34%**
HINDUNILVR	2074.20	1993.00	**4.07%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TCS	2342.70	2379.50	**-1.55%**
TECHM	1723.00	1750.00	**-1.54%**
INFY	1091.90	1108.80	**-1.52%**
APOLLOHOSP	8738.00	8821.00	**-0.94%**
HCLTECH	1332.90	1344.70	**-0.88%**

(Source: Moneycontrol)

- **Larsen & Toubro** is targeting production of the indigenously developed Zorawar light battle tank by 2029, while awaiting the outcome of its bid for the Advanced Medium Combat Aircraft (AMCA) programme, a senior company executive said at the Rising Bharat Summit - North Edition in Lucknow.

- **SBI Funds Management** has partnered with **Punjab National Bank** for distribution of its schemes through the bank's branch network. SBI Funds Management said it will leverage its experience in working with public sector banks, particularly State Bank of India, to expand mutual fund participation across diverse customer segments.

- **Apollo Micro Systems** said it has signed a memorandum of understanding (MoU) with Hyderabad-based Redon Systems to collaborate on the development of tethered drone systems, multi-barrel loitering munition systems and other aerial platforms for the Indian defence forces and government requirements.

- **Markolines Pavement Technologies** secured three work orders aggregating Rs 234.83 crore for infrastructure and road maintenance projects in the Andaman & Nicobar Islands and Andhra Pradesh.

- **Blue Cloud Softech Solutions** signed a five-year collaboration agreement with Mahesh Babu Foundation.

- **Vectras Enprocon** announced that it has received a domestic contract award from GAIL (India) valued at approximately Rs 13.93 crore.

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

Global News

- U.S. pending home sales sank by 4.7% from the previous month in October of 2026 to a fresh record low, a greater amount than the 2% drop.
- U.S. housing starts surged 9.9% month-on-month to a seasonally adjusted annual rate of 1.309 million in October 2026, followed by a downwardly revised 1.191 million in September. Building permits fell 7.4% month-on-month in October 2026, to a seasonally adjusted annual rate of 1.295 million.
- U.K.'s total order book balance improved to -12 in November 2026, recovering from October's three-month low of -32.
- Eurozone current account surplus narrowed to EUR 27.5 billion in September 2026, down from EUR 32.6 billion a year earlier.
- Australia's seasonally adjusted unemployment rate rose to 4.9% in October, employment fell by 43,500 to a five-month low of 14.74 million in October 2026, deepening from a downwardly revised decline of 36,400 in the previous month.

- Japan's core machinery orders, which exclude volatile sectors such as ships and electric utilities, fell 0.3% month-on-month to JPY 1,066.2 billion in September 2026, reversing a 5.2% increase in the previous month. Annual machinery orders rose 13.4%, easing from 18.6% in August and slightly missing the 13.7% consensus, but extending the growth streak to four months.

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

Economic News

- Crude Oil traded at US$ 83.31/bbl (IST 17:00).
- INR strengthened to Rs. 93.30 from Rs. 93.45 against each US$ resulting in daily change of 0.16%.
- IIndia will gradually lower wine tariffs on New Zealand imports, which currently stand at 150%. This reduction is part of the new India-New Zealand Free Trade Agreement, expected to last for ten years. New Zealand companies are optimistic about expanding their market presence in India. Both countries anticipate mutual benefits from this trade deal in various sectors. An increase in wine consumption in India may follow these tariff reductions.
- India's six publicly listed Real Estate Investment Trusts distributed over Rs 3,234 crore to unitholders during the second quarter. The sector has a total gross Assets Under Management exceeding Rs 3.30 lakh crore as of September quarter. The combined market capitalisation reached over Rs 2.09 lakh crore as of November 17. Healthy occupancy and consistent rental collections support this sector's growth, creating a favorable environment for investors.
- The Health Ministry has proposed amending the New Drugs and Clinical Trials Rules, 2019, to bring antimicrobials under Central regulatory oversight. The move would require manufacturers to secure prior approval from the Central Licensing Authority, addressing concerns over inadequate scrutiny and the growing threat of antimicrobial resistance.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 20/11/2026

Indian Bank	Fund Raising
TTK Healthcare Limited	Bonus
Valecha Engineering Limited	Financial Results

(Source: NSE)

Corporate Actions as on 20/11/2026

Ashok Leyland Limited	Interim Dividend - Re 1 Per Share
Oil India Limited	Interim Dividend - Rs 7 Per Share
Polyplex Corporation Limited	Interim Dividend - Rs 12 Per Share
SML Mahindra Limited	Rights 2:7 @ Premium Rs 3496/-
Alufluoride Limited	Interim Dividend - Rs 2.50 Per Share
BF Investment Limited	Interim Dividend - Rs 20 Per Share
Jamna Auto Industries Limited	Interim Dividend - Re 1 Per Share
Marsons Limited	Interim Dividend - Re 0.05 Per Share
Medi Assist Healthcare Services Limited	Buy Back
Skyways Air Services Limited	Interim Dividend - Re 0.40 Per Share
Talbros Automotive Components Limited	Interim Dividend - Re 0.30 Per Share

(Source: NSE)

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