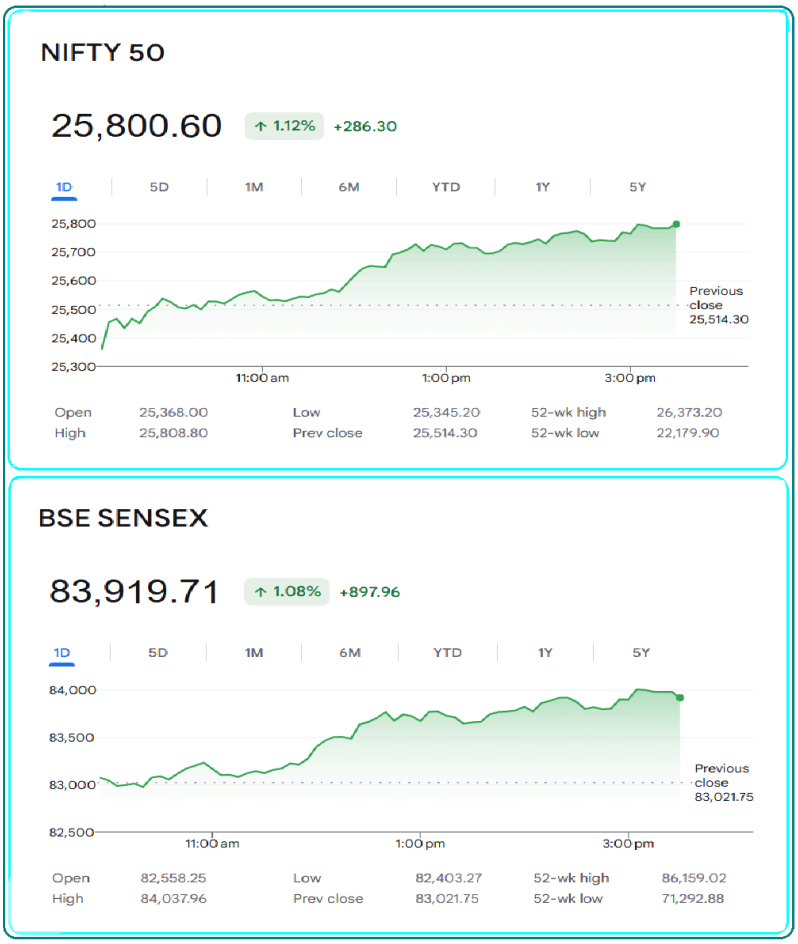
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

20th November 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25800.60	25514.30	**1.12%**
S&P BSE SENSEX	83919.71	83021.75	**1.08%**
NIFTY MID100	62031.00	61624.40	**0.66%**
NIFTY SML100	19443.60	19468.40	**-0.13%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity indices ended with strong gains, extending their rally for the second consecutive session amid sustained foreign fund inflows and a stronger rupee against US dollar. The Nifty closed tad above the 25,800 level.
- The S&P BSE Sensex jumped 897.96 points, or 1.08%, to 83,919.71, while the Nifty 50 rose 286.30 points, or 1.12%, to 25,800.60. In two trading sessions, the Sensex gained 2.29% while the Nifty 50 added 2.26%.
- The S&P BSE Mid-Cap index rallied 0.40% and the S&P BSE Small-Cap index advanced 0.07%.
- Among the sectoral indices, the Nifty Private Bank index (up 3.01%), the Nifty Realty index (up 1.71%) and the Nifty Financial Services index (up 1.66%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 1.68%), the Nifty Consumer Durables index (down 0.40%) and the Nifty Metal Index (down 0.23%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **December** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **42358** contracts at the end of the day.
- **Long** position build up for the **December** series has been witnessed in **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **INFY**.
- **Short** position build up for the **December** series has been witnessed in **RELIANCE**, **LT**, **ITC**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	64635.20	63063.00	2.49%
NIFTY AUTO	28787.65	28601.30	0.65%
NIFTY FMCG	48535.70	48564.25	-0.06%
NIFTY IT	31322.65	30919.45	1.30%
NIFTY METAL	12271.10	12299.75	-0.23%
NIFTY PHARMA	28386.90	28371.80	0.05%
NIFTY REALTY	938.90	923.10	1.71%
BSE CG	70821.38	71143.28	-0.45%
BSE CD	61704.03	62063.61	-0.58%
BSE Oil & GAS	26979.43	26854.23	0.47%
BSE POWER	7185.24	7211.76	-0.37%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	56436.65	59444.21	-5.06%
HANG SENG	22410.80	22841.62	-1.89%
STRAITS TIMES	4975.17	5079.49	-2.05%
SHANGHAI	3533.79	3577.62	-1.23%
KOSPI	4869.96	5137.89	-5.21%
JAKARTA	5146.33	5194.14	-0.92%
TAIWAN	36033.29	38426.89	-6.23%
KLSE COMPOSITE	1556.51	1566.16	-0.62%
All ORDINARIES	8692.80	8836.60	-1.63%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	136146.73	122515.43
NSE F&O	479097.44	412246.36

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	10308.42
NET SELL	-

(Source: NSE)

Corporate News

- **Coal India**, ReNew, Prozeal Green Energy and Midwest Energy have secured government approval to manufacture rare earth permanent magnets under India's Rs 7,280 crore scheme. The initiative aims to reduce dependence on China for magnets used in electric vehicles, wind turbines, electronics, aerospace and defence. Selected companies will receive capital subsidies and production incentives to build domestic manufacturing capacity.

- **Dilip Buildcon** has received a Letter of Acceptance for the tender floated by the Gurugram Metro Rail Limited (GMRL). The total value of the order is worth Rs. 419.47 crore.

- **NATCO Pharma** announced receiving an Establishment Inspection Report from the US FDA for its FDF Unit. The inspection took place in Vishakhapatnam from August 17 to August 21. The company noted that the FDA issued four observations in the Form-483 following its inspection. The classification of the inspection is Voluntary Action Indicated, according to NATCO Pharma. Their share price has fallen by 0.35% on the Bombay Stock Exchange.

- Paytm parent **One 97 Communications** said its Singapore arm will invest up to Rs 200 crore in subsidiaries of Singapore-based Funding Societies, including about Rs 162 crore for a 19.1% stake in its payments subsidiary CardUp.

- **Ashoka Buildcon** said about the cancellation of a project worth Rs. 846.38 crore by Diriyah Company, Kingdom of Saudi Arabia due to internal factors.

- Fairfax arm to acquire 3 million IIFL Capital shares from promoter group.

- **EMS** has received the Letter of Award (LOA) from National Highways Authority of India (NHAI) for operations at Ratowa Fee Plaza at Km 219+300 of NH-715 on Dolabari-Jamuguri and Jamuguri- Gohpur sections in the State of Assam and upkeep/maintenance of adjacent Toilet blocks including recouping the consumable items. The estimated order value of the Work awarded (excluding TCS) is approximately Rs. 13.96 crore.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	9200.00	8738.00	**5.29%**
AXISBANK	1446.00	1380.80	**4.72%**
MAXHEALTH	1081.00	1040.65	**3.88%**
MARUTI	14011.00	13589.00	**3.11%**
ULTRACEMCO	12939.00	12560.00	**3.02%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TITAN	4620.00	4700.00	**-1.70%**
TATASTEEL	178.00	180.89	**-1.60%**
NTPC	321.50	325.00	**-1.08%**
HINDUNILVR	2052.50	2074.20	**-1.05%**
JIOFIN	224.97	226.80	**-0.81%**

(Source: Moneycontrol)

- **Firstsource Solutions** announced a strategic partnership with SEW.AI to jointly develop AI-powered solutions for energy and water utilities.
- **JK Cement** approved an investment of Rs 5.14 crore in Clean Renewable Energy KK 1E to source solar power for its Muddapur plant in Karnataka.
- **ACME Solar Holdings**, through its wholly owned subsidiary ACME Sigma Urja, has commissioned 57.69 MW of contracted firm and dispatchable renewable energy (FDRE) capacity at its 250 MW FDRE project in Rajasthan on 19 November 2026.

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

Global News

- The People's Bank of China (PBoC) kept its key lending rates at record lows for the 18th consecutive month in November 2026. The one-year loan prime rate (LPR), the benchmark for most corporate and household borrowing, remained at 3.0%, while the five-year LPR, a reference for mortgage rates, held at 3.5%.
- U.S. initial jobless claims inched up to 203,000 in the week ended November 14th, an increase of 1,000 from the previous week's revised level of 202,000.
- U.S. Conference Board said its leading economic index fell by 0.3% in October after coming in unchanged in September.
- U..K retail sales volumes rose 0.7% month-on-month in October 2026, rebounding from a revised 0.6% decline in September. On a yearly basis, retail sales growth accelerated to 2.3%, from 0.4% in September, exceeding forecasts of 1.7%. Core retail sales increased 0.9% month-on-month in October 2026, rebounding from an upwardly revised 0.9% decline in the previous month. On a yearly basis, retail sales excluding fuel climbed to 2.5% from a downwardly revised 0.4%.
- U.K. GfK Consumer Confidence Index rose 2 points to -22 in November 2026, recovering slightly from -24 in October.
- Germany's producer prices jumped 8.1% year-on-year in October 2026, accelerating from 6.7% in the previous month. On a monthly basis, prices increased 1.4%, easing from September's six-month high of 1.9%.
- France’s manufacturing business climate index fell to 104 in November 2026 from 105 in October.
- Japan's annual inflation rate accelerated to 2.3% in October 2026 from 2.1% in the prior month. Core inflation edged up

to 2.2% from September's 2.1%. Monthly, consumer prices rose 0.5%, up from 0.4% in September.

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

Economic News

- Crude Oil traded at US$ 82.03/bbl (IST 17:00).
- INR strengthened to Rs. 92.68 from Rs. 93.30 against each US$ resulting in daily change of 0.66%.
- India's crude oil import bill surged 88% year-on-year to $19.5 billion in October, as Brent averaged $123.93 a barrel, its highest monthly level since March 2012. Higher prices and an 11% rise in import volumes drove the increase. Meanwhile, refined product export earnings jumped 90% to $6.3 billion, offering a partial cushion against the higher cost of energy imports overall.
- India and Japan have agreed to deepen collaboration across defence, economic security, and critical technologies, while unveiling a joint logo to mark 75 years of diplomatic relations, as External Affairs Minister S Jaishankar concluded his three-day official visit to Japan on Friday.
- EPFO has initiated measures allowing self-employed individuals to contribute to their provident fund and pension. The organization has also reduced the minimum EPF balance requirement from 25% to 10% for withdrawals. Additionally, a systematic withdrawal plan enables retirees to receive their provident fund savings in installments instead of a lump sum. These reforms aim to enhance financial flexibility and support social security for gig workers.
- India is experiencing its most severe decline in wheat acreage in 26 years due to insufficient monsoon rains. Farmers are shifting to less water-intensive crops like chickpeas and rapeseed, which promise better returns. The government's minimal increase in wheat procurement prices has also discouraged wheat planting among farmers. As a result, wheat acreage is expected to drop to its lowest level in four years.
- India has achieved the 20% ethanol blending milestone during Ethanol Supply Year (ESY) 2025-26, recording an average blending level of 19.99%, according to provisional data as on October 31, 2026. The achievement underscores the country's continued progress in strengthening energy security, reducing dependence on imported fossil fuels and creating greater linkages between agriculture and the energy sector, according to a statement by All India Distillers Association (AIDA).

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 21/11/2026

Embassy Developments Limited	Fund Raising
Viviana Power Tech Limited	Fund Raising

Board Meetings as on 23/11/2026

Bombay Coated and Special Steels Limited	Financial Results
Dalmia Bharat Limited	Buyback

(Source: NSE)

Corporate Actions as on 23/11/2026

Pashupati Cotspin Limited	Interim Dividend - Re 0.02 Per Share

(Source: NSE)

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