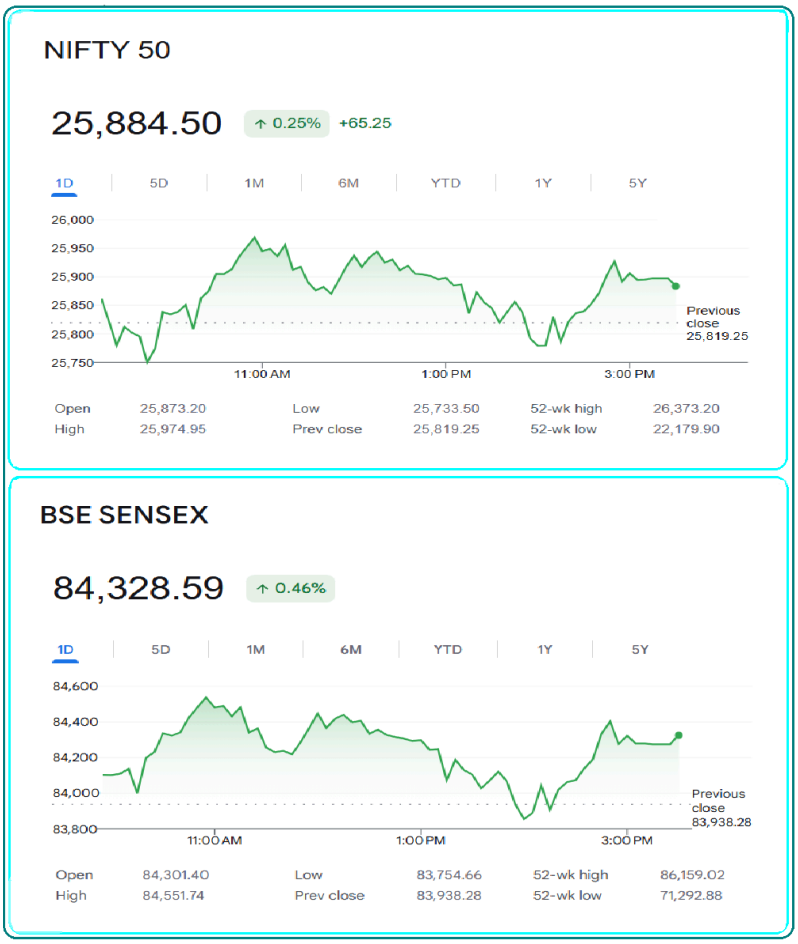
SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

EQUITY DAILY REPORT

26th November 2026

Index Chart



(Source: Bloomberg)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25884.50	25819.25	**0.25%**
S&P BSE SENSEX	84328.59	83938.28	**0.46%**
NIFTY MID100	61781.85	61584.75	**0.32%**
NIFTY SML100	19372.15	19229.35	**0.74%**

(Source: NSE, BSE)

Market Wrap Up

- The key equity benchmarks ended with modest gains, extending their gains for the second consecutive trading session amid sustained buying by foreign institutional investors (FIIs) and a decline in crude oil prices. However, concerns over fresh US tariff proposals kept investors cautious and capped the market's upside. The Nifty settled above the 25,850 mark.
- The BSE Sensex advanced 390.31 points or 0.46% to 84,328.59. The Nifty 50 index added 65.25 points or 0.25% to 25,884.50. In the two consecutive trading sessions, the Sensex and the Nifty rose 2.30% and 2.11%, respectively.
- The Nifty MidCap 150 Index added 0.26% and the Nifty SmallCap 250 Index rose 0.59%.
- Among the sectoral indices, the Nifty IT index (up 3.66%), the Nifty Realty index (up 3.27%) and the Nifty Metal index (up 1.17%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Consumer Durables index (down 1.33%), the Nifty FMCG index (down 0.94%) and the Nifty Auto index (down 0.69%) 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 **12207** contracts at the end of the day.
- **Long** position build up for the **December** series has been witnessed in **RELIANCE**, **HDFCBANK**, **INFY**.
- **Short** position build up for the **December** series has been witnessed in **BHARTIARTL**, **SBIN**, **ICICIBANK**.
- **Unwinding** position for the **December** series has been witnessed in **BHEL**, **VEDL**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	63535.30	63703.25	-0.26%
NIFTY AUTO	28623.45	28821.50	-0.69%
NIFTY FMCG	49673.55	50143.50	-0.94%
NIFTY IT	33386.95	32207.55	3.66%
NIFTY METAL	11713.50	11578.50	1.17%
NIFTY PHARMA	29090.85	28961.90	0.45%
NIFTY REALTY	972.85	942.00	3.27%
BSE CG	70447.83	70027.89	0.60%
BSE CD	61142.55	61971.05	-1.34%
BSE Oil & GAS	26689.04	26668.89	0.08%
BSE POWER	7072.29	7022.70	0.71%

(Source: NSE, BSE)

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	57499.16	57011.62	0.86%
HANG SENG	22226.88	21966.01	1.19%
STRAITS TIMES	4962.64	4930.83	0.65%
SHANGHAI	3476.88	3476.47	0.01%
KOSPI	4711.21	4697.51	0.29%
JAKARTA	5242.17	5197.61	0.86%
TAIWAN	39151.81	38195.43	2.50%
KLSE COMPOSITE	1570.98	1562.29	0.56%
All ORDINARIES	8866.10	8794.30	0.82%

(Source: Yahoo Finance)

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	125591.36	137205.83
NSE F&O	140286.47	180711.39

(Source: NSE)

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	5843.33
NET SELL	-

(Source: NSE)

Corporate News

- **Wipro Limited** announced a strategic partnership with British energy major BP to transform the latter's core finance operations. Under the agreement, around 3,000 BP employees supporting finance operations across India, Hungary and Malaysia will transition to Wipro.
- **Siemens Energy India** reported an 81.5% year-on-year increase in standalone net profit to Rs 653 crore in Q4 FY2026, compared with Rs 360 crore in the corresponding quarter last year. Revenue from operations increased 30.4% year on year to Rs 3,453 crore from Rs 2,646 crore.
- **Diamond Power Infrastructure** received two purchase orders worth Rs 488.18 crore from Adani Energy Solutions. The order entails the supply of 6,659.66 km of AL-59 conductors for the ±800 kV HVDC Bhadla-Fatehpur transmission project.
- **ACME Solar Holdings**, through its wholly owned subsidiary ACME Sigma Urja, has commissioned an additional battery energy storage system (BESS) discharge capacity of 14.55 MW/60.387 MWh at its 50 MW/209 MWh TATA FDRE power project in Rajasthan.
- **GAIL** intends to enter the growing data centre market by partnering with an established operator. The company aims to develop its first facility in Faridabad with a capacity of at least 5 MW. The joint venture will leverage GAIL's extensive optical fibre network and land holdings to support the project. Additional data centres may be developed across various states after evaluation of the initial facility's performance.
- **Royal Enfield** has signed a non-binding Memorandum of Understanding with the Tamil Nadu government. The investment of Rs 1,000 crore aims to accelerate the company's electric vehicle development over seven years. This investment will create up to 500 job opportunities, contributing to the socio-economic growth of Tamil Nadu. The initiative follows a commitment for brownfield expansion at its Cheyyar facility for annual motorcycle production.
- **Jio Platforms** has entered India's booming digital astrology market with JioAstro, an AI-powered Vedic astrology platform offering personalised Kundali readings, horoscopes and birth chart analysis. The launch

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	1468.60	1380.00	**6.42%**
BSE	3990.40	3775.20	**5.70%**
TCS	2640.30	2517.30	**4.89%**
INFY	1183.00	1130.00	**4.69%**
TECHM	1854.70	1801.20	**2.97%**

(Source: Moneycontrol)

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	2543.00	2621.20	**-2.98%**
BAJFINANCE	1097.85	1131.35	**-2.96%**
SHRIRAMFIN	961.85	989.95	**-2.84%**
NESTLEIND	1320.30	1358.50	**-2.81%**
BAJAJFINSV	1885.90	1925.00	**-2.03%**

(Source: Moneycontrol)

- **Shilpa Medicare** has received the Establishment Inspection Report (EIR) from the United States Food and Drug Administration (USFDA) with a Voluntary Action Indicated (VAI) classification for the Surveillance Inspection of Unit VII, Analytical Services Division and the inspection is now closed. The unit is at Plot No. 79, Road No. 15, Survey No. 125, IDA Mallapur, Nacharam, Uppal Mandal, Medchal-Malkajgiri Dist., Hyderabad, Telangana - 500076. The inspection was conducted from 16 September 2026 to 18 September 2026.

- **Ashok Leyland** Singur plant: The road to Singur 2.0 is unlikely to be easy. Rising land prices, fragmented ownership, uncertain funding and the absence of a well-set supplier ecosystem mean it may take a lot for the project to become more than just symbolism.

puts the Reliance Industries-backed company in competition with players such as Astrotalk and AstroSage.

- **Jyoti Structures Ltd.** announced an order win of Rs. 272 crore, excluding GST, from Sterlite Grid 5 Limited for the 400 kV double-circuit Xeldom-Narendra Transmission Line Project in Goa and Karnataka.

- **CESC**'s subsidiary, Purvah Green Power, issued a Letter of Award (LoA) to Venwind Refex Power. The project involves the supply of wind turbine generators (WTGs) and tubular towers, along with the execution of 153.7 MW wind power projects in Madhya Pradesh.

- **Patel Engineering** has been declared as lowest bidder (L1) by Dirang Energy (DEPL) for the development of the 144 MW Gongri Hydro Electric Project in West Kameng district, Arunachal Pradesh.

- **KSB** received an order worth approximately Rs 117 crore from Triveni Turbines for the supply of 15 sets of boiler feed pumps and accessories for JSW Energy's Salboni Supercritical Power Plant project.

- **LCC Projects**'s Joint venture (JV), Laxmi Civil Engineering Services Pvt. Ltd - LCC received an letter of Acceptance (LoA) for a dam construction and irrigation infrastructure project in Rajasthan. The JV received the LoA from the Office of the Executive Engineer, Water Resources Division, Aklera, Jhalawar district, Rajasthan, for a project worth Rs 728.51 crore, excluding GST.

- **Atlanta Electricals** received a Letter of Intent (LOI) worth Rs 523.21 crore from Transmission Corporation of Andhra Pradesh Limited (APTRANSCO) for the supply of power transformers.

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

Global News

- U.S. initial jobless claims dropped to 189,000 in the week ended November 21st, a decrease of 13,000 from the previous week's revised level of 202,000. Continuing claims, a gauge of outstanding unemployment in the country, fell by 95,000 to 1,697,000 in the second week of the month.
- U.S. gross domestic product shot up by 4.3% in the third quarter compared to the 3.4% jump previously estimated.
- U.S. durable goods orders rose by 0.2% in October after surging by an upwardly revised 2.0% in September. Core durable goods orders increased by 0.5%, the same pace as in September.
- U.S. new home sales soared by 14.2% to an annual rate of 701,000 in October after plummeting by 9.7% to a revised rate of 614,000 in September.
- U.S. building permits fell 7.2% month-on-month in October 2026 to a seasonally adjusted annual rate of 1.297 million.
- Eurozone household lending rose 3.1% year-on-year to EUR 7.295 trillion in October 2026, unchanged for a fourth consecutive month. Lending to businesses accelerated to 4.5% year-on-year from 4.2% in September, indicating stronger corporate credit demand. Overall private-sector credit growth eased slightly to 4.3% in October from 4.4% in the previous month. M2 Money Supply increased to 16540653 EUR Million in October from 16505484 EUR Million in September of 2026.
- Germany's GfK Consumer Climate Indicator rose to -30.2 heading into December 2026 from a marginally revised -30.9 in November.
- French domestic producer prices rose by 1.3% month-over-month in October 2026, easing from an upwardly revised 1.8% increase in the previous period. On a yearly basis, producer prices climbed 8.2%, accelerating from an upwardly revised 6.9% in September.

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

Economic News

- Crude Oil traded at US$ 84.46/bbl (IST 17:00).
- INR weakened to Rs. 92.45 from Rs. 92.24 against each US$ resulting in daily change of 0.23%.
- The Reserve Bank of India's net dollar purchases fell sharply to $6.9 billion in September from $43.2 billion in August, when inflows under its special FCNR(B) scheme drove buying. The rupee depreciated 0.9% during September, while India's real effective exchange rate improved to 93.14 in October.
- The Directorate General of Foreign Trade has extended the deadline for duty-free imports of the remaining raw sugar under India's 10-lakh-tonne quota by three months to March 31, 2027. The deadline for refining the imported sugar into white sugar and selling it domestically has also been extended to September 30, 2027.
- The Union Cabinet has approved an Rs 11,000 crore scheme to boost domestic manufacturing of construction and

infrastructure equipment, alongside a Rs 4,288.26 crore second container terminal at Kamarajar Port. It also cleared Prudential Corporation Holdings' proposed FDI of up to Rs 11,500 crore in Bharti Life Insurance.

- India's foodgrain production reached a record 378.54 million tonnes in the 2025-26 crop year, an increase of 20.81 million tonnes over the previous year, driven by higher output of rice, wheat, maize and pulses.
- India's sugar production is estimated to decline by around 5.4% to 265 lakh tonnes in the 2026-27 sugar season, compared with 280 lakh tonnes in the previous season.
- Air passenger service prices recorded the steepest year-on-year increase of 35.5% in the July-September quarter of FY27, according to the government's Service Producer Price Index. Banking and railway services also recorded price movements, with the newly introduced index tracking producer-level price changes across seven services sectors.
- Pharmaceutical exports from India reached approximately $18.89 billion during the first seven months of fiscal year 2027. Imports experienced a slower growth, rising to $5.65 billion in the same period. The United States maintained its status as the largest export destination, despite a slight decline year-on-year. Brazil showed strong growth as the second-largest destination for India's pharmaceutical products.

(Source: Economic Times, Business Standard)

Forthcoming Events

Board Meetings as on 27/11/2026

Indian Bank	Fund Raising
Setco Automotive Limited	Financial Results
Steel City Securities Limited	Dividend

(Source: NSE)

Corporate Actions as on 27/11/2026

Fusion CX Limited	Dividend - Re 0.75 Per Share

(Source: NSE)

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