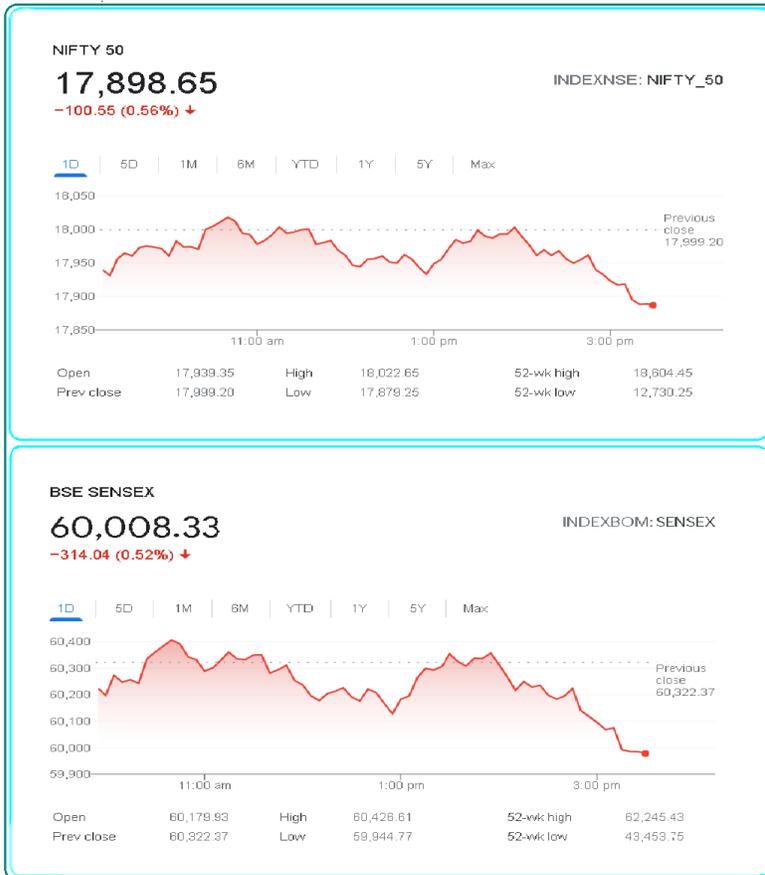


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	17898.65	17999.20	-0.56%
S&P BSE SENSEX	60008.33	60322.37	-0.52%
NIFTY MID100	31729.00	31942.55	-0.67%
NIFTY SML100	11219.40	11205.35	0.13%

(Source: [NSE](#), [BSE](#))

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	38041.55	38307.10	-0.69%

Market Wrap Up

- The domestic equity barometers ended with modest losses. The Nifty closed below the 17,900 mark after hitting the day's high of 18,022.65 in morning trade. After hovering near the flat line for most part of the session, the benchmarks tumbled in the last hour of the session.
- The S&P BSE Sensex, lost 314.04 points or 0.52% to 60,008.33. The Nifty 50 index fell 100.55 points or 0.56% to 17,898.65.
- The BSE Mid-Cap index fell 0.21% and the BSE Small-Cap index rose 0.05%.
- Among the sectoral indices on the BSE, the Power index (up 0.63%), the Auto index (up 0.61%) and the Utilities index (up 0.46%) outperformed the S&P BSE Sensex. Meanwhile, the Realty index (down 1.79%), the Energy index (down 1.78%) and the Oil & Gas index (down 1.39%) underperformed the S&P BSE Sensex.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **November** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **2082** contracts at the end of the day.
- **Long** position build up for the **November** series has been witnessed in **ONGC, SBIN, INFY**.
- **Short** position build up for the **November** series has been witnessed in **RELIANCE, ICICIBANK, HDFCBANK, HDFC**.
- **Unwinding** position for the **November** series has been witnessed in **BHEL**.

(Source: Capitaline F&O)

NIFTY AUTO	12061.80	11977.30	0.71%
NIFTY FMCG	39013.45	39014.65	0.00%
NIFTY IT	36660.90	36643.85	0.05%
NIFTY METAL	5568.10	5586.35	-0.33%
NIFTY PHARMA	13621.90	13798.80	-1.28%
NIFTY REALTY	536.15	545.10	-1.64%
BSE CG	29034.98	29121.74	-0.30%
BSE CD	45084.03	45276.39	-0.42%
BSE Oil & GAS	18622.46	18885.37	-1.39%
BSE POWER	3580.45	3558.21	0.63%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	29688.33	29808.12	-0.40%
HangSeng	25650.08	25713.78	-0.25%
Straits Times	3232.68	3238.80	-0.19%
Shanghai	3537.37	3521.79	0.44%
Kospi	2962.42	2997.21	-1.16%
Jakarta	6675.80	6651.21	0.37%
Taiwan	17764.04	17693.13	0.40%
KLSE Composite	1525.13	1522.89	0.15%
All Ordinaries	7704.00	7747.10	-0.56%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	63019.21	66674.94
NSE F&O	6731249.90	5398966.93

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	344.35

(Source: [NSE](#))

Corporate News

- **Cipla** announced the launch of Spirofy, India's first pneumotach based portable, wireless Spirometer, on World COPD Day.
- **Biocon**-led subsidiary, Biocon Biologics and Viatris have launched interchangeable biosimilars SEMGLEE (insulin glargineyfgn) injection, a branded product, and Insulin Glargine (insulin glargine-yfgn) injection, an unbranded product, to help control high blood sugar in adult and pediatric patients with type 1 diabetes and adults with type 2 diabetes.
- **Orchid Pharma Limited** said that the Rule 144A and Regulation S Deposit Agreements dated November 02, 2005, entered into between the Company, Citibank, N.A. (Depository), and the Holders and Beneficial Owners of the GDRs have been terminated with effect from November 15, 2021.
- **Infosys** and MIT Technology Review, a world-renowned technology media brand and its custom publishing division Insights, today announced the launch of 'The Cloud Hub', a forum offering insights and learning from successful cloud transformations to help global enterprises accelerate their cloud journey.
- **HCL Technologies** has announced a new multi-year application deal with Euroclear Group to accelerate its agile transformation journey with technologies and working practices to improve its digital capabilities.
- **Tata Consultancy Services** has announced a strategic transformation engagement with Zebra Technologies Corporation (NASDAQ: ZBRA), a market leader in industry-tailored solutions that make every front-line worker and asset at the edge visible, connected and fully optimized.
- **L&T Technology Services** announced that it has been selected as an engineering partner by Mavenir and NVIDIA, to accelerate the adoption of the industry's first converged AI-on-5G. LTTS will support Mavenir with customization, integration and deployment of AI applications for deployment on NVIDIA's AI-on-5G Platform.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SBILIFE	1187.20	1153.00	2.97%
MARUTI	8274.75	8050.35	2.79%
ASIANPAINT	3230.25	3151.70	2.49%
TATAMOTORS	530.15	519.05	2.14%
POWERGRID	191.05	187.60	1.84%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
UPL	755.60	780.05	-3.13%
RELIANCE	2464.00	2517.90	-2.14%
BRITANNIA	3615.05	3690.75	-2.05%
IOC	128.45	131.00	-1.95%
AXISBANK	712.35	726.15	-1.90%

(Source: [Moneycontrol](#))

- **Mahindra & Mahindra Financial Services** announced the launch of lease-based vehicle subscription business for the urban centres, eyeing a business of Rs 10,000 crore in the next 3-5 years.
- **IndusInd Bank** announced the launch of 'Indus Merchant Solutions' a comprehensive mobile application (app) to enable merchants, retailers and professionals to carry out banking transactions digitally, on a single platform.

Global News

- U.S. retail sales to jump by 1.4% compared to the 0.7% increase originally reported for the previous month. Core retail sales still surged up by 1.7% in October after rising by 0.7% in September.
- U.S. industrial production surged up by 1.6% in October after tumbling by 1.3% in September. Manufacturing output jumped by 1.2% in October after falling by 0.7% in September, reflecting a sharp increase in the production of motor vehicles and parts.
- U.S. import prices shot up by 1.2% in October after rising by 0.4% in September. Export prices also surged up by 1.5% in October after climbing by an upwardly revised 0.4% in September.
- U.S. business inventories rose by 0.7% in September after climbing by an upwardly revised 0.8% in August.

- U GRO Capital has entered into a co-lending partnership with **State Bank of India** to provide credit to the micro, small and medium enterprises (MSME). Through this collaboration, SBI and U GRO aim to disburse up to Rs500cr by March 2022.
- **NIIT Limited** said that Axis Bank - NIIT Digital Banking Academy has launched its second programme for experienced IT professionals - "FinTech Engineering Programme" that offers a great career as "FrontEnd and BackEnd Application Developers" with Freecharge, one of the leading digital platforms for financial services and a wholly-owned subsidiary of **Axis Bank**.
- **Aban Offshore Ltd** has announced that its step-down subsidiary Aban Singapore Pte Ltd has received letter of award (LoA) from Oil and Natural Gas Corporation Limited (ONGC).
- **Linde India Limited** said that the Belloxy Divestment as per the Order of the Competition Commission of India (CCI). It said, the company's joint venture company, Bellary Oxygen Company Private Ltd. has accepted JSW Steel Ltd.'s offer for the purchase of the 855 tonnes per day Air Separation Unit and other related assets owned by the aforesaid joint venture company, which form part of the Belloxy Divestment.
- **KDDL** said that the company intimated the signing of an agreement with brands by Ethos Limited, Material Subsidiary.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

- U.K. consumer price inflation advanced to 4.2% in October from 3.1% in September. On a monthly basis, consumer prices were up 1.1% versus September's 0.3% rise. Core inflation rose to 3.4% in October from 2.9% in September.
- U.K. output price inflation increased to 8% from 7% in September. Similarly, input prices advanced at a pace of 13.0% annually, following the 11.9% increase a month ago. Month-on-month, output prices gained 1.1% compared to a 0.7% rise in September. At the same time, input prices climbed 1.4% on month after a 0.8% rise in the previous month.
- U.K. house prices grew 11.8% from the last year, up from 10.2% in August.
- Eurozone gross domestic product grew 2.2% from the prior quarter, when it was up 2.1%. On a yearly basis, economic growth slowed to 3.7% from 14.2% in the preceding period.
- Eurozone inflation rose to 4.1% in October from 3.4% in September. Core inflation advanced to 2.0% from 1.9% a month ago. The rate was revised down from 2.1% estimated previously. On a monthly basis, the consumer price index climbed 0.8%.
- Japan posted a merchandise trade deficit of 67.370 billion yen in October, following the downwardly revised 624.1 billion yen deficit in September (originally a deficit of 622.8 billion yen). Exports were up 9.4% on year at 7.184 trillion yen, following the 13.0% gain in the previous month. Imports climbed an annual 267% to 7.251 trillion yen slowing from 38.6% a month earlier.
- Japan's core machine orders were down 0.4 billion yen or 0.0% in September - coming in at 838.9 billion yen. On a yearly basis, core machine orders rose 12.5% - after rising 17.0% in the previous month.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 79.84/bbl (IST 17:00).
- INR strengthened to Rs. 74.27 from Rs. 74.37 against each US\$ resulting in daily change of 0.13%.
- The Union Cabinet cleared utilisation of the Universal Service Obligation Fund (USOF) for provision of mobile connectivity in 7,287 uncovered villages across five states at an estimated cost of Rs 6,466 crore. Briefing media on the Cabinet decisions, Information and Broadcasting Minister Anurag Thakur said these uncovered villages of 44 aspirational districts across five states of Andhra Pradesh, Chhattisgarh, Jharkhand, Maharashtra and Odisha will get 4G-based mobile services.
- Citing faster-than-expected recovery, rising consumer confidence and the resultant spending spike, Swiss brokerage UBS Securities has revised upwards its growth forecast for the current fiscal to 9.5 per cent from 8.9 per cent in September.
- India will pitch for finding a permanent solution to the issue of public stock holding for food security purposes in the forthcoming meeting of the World Trade Organisation (WTO) at Geneva, starting from November 30, an official said. The official expressed hope that "something may come" up on public stockholding and domestic support, which are part of negotiations on the agriculture sector, in the 12th ministerial conference, which is the highest decision making body of the 164-member WTO.

- The Cabinet approved the construction of 32,152 km roads in far-flung areas of the country at a cost of Rs 33,822 crore.
- The Directorate General of Foreign Trade has notified the Standard Operating Procedures for random checking of imported consignments of metal scrap with respect to radioactive contamination as per which, no container without a certificate issued by a Pre-Shipment Inspection Agency should be allowed to be unloaded and must be sent back to country of origin. In case any container is found showing radiation levels exceeding the preset alarm level, it should be immediately subjected to identification of source of radiation, the DGFT said in a notification.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 18/11/2021

Escorts Limited	Fund Raising
Libas Consumer Products Limited	Fund Raising
Macrotech Developers Limited	Fund Raising
Sagar Cements Limited	Fund Raising
Som Distilleries & Breweries Limited	Fund Raising
SPML Infra Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 18/11/2021

Steel Strips Wheels Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 5/- Per Share
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(Source: NSE)

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Saltlake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : research@shriraminsight.com | www.shriraminsight.com | *Through Insight Commodities & Futures Pvt. Ltd