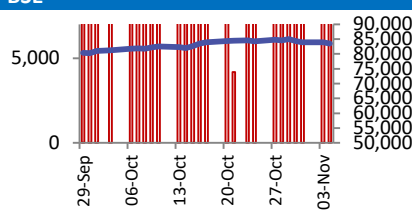
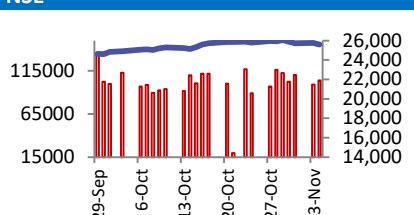


BSE		NSE			
	Open	83150		Open	25434
	High	83390		High	25551
	Low	82671		Low	25318
	Close	83216		Close	25492
	Change	-95		Change	-17
	Volume (Lacs)	8091		Volume(Lacs)	43675
	Turnover (Rs.inCr)	8649		Turnover(Rs.in Cr)	118391

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	46987	46912	75	0.16%
Dow Futures	47200	47085	115	0.24%
Nasdaq	23005	23054	(49)	-0.21%
FTSE	9683	9736	(53)	-0.55%
Nikkei	50767	50276	491	0.98%
Hang Seng	26388	26242	146	0.56%
Gift Nifty	25656	25594	62	0.24%
Straits Singapore	4465	4492	(28)	-0.62%
South Korea	4068	3954	114	2.89%
Taiwan	27851	27651	199	0.72%
Shanghai	3999	3998	1	0.03%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	10717	10683	34	0.3%
Alumin (\$/MT)	2848	2845	4	0.1%
Zinc (\$/MT)	3057	3047	10	0.3%
Brent Crude (\$/bbl)	64	64	0	0.7%
Gold (\$/Ounce)	4046	4001	45	1.1%
Silver (\$/Ounce)	49	48	1	1.5%
Light Crude (\$/bbl)	60	60	0	0.8%
N G (\$/mmbtu)	4	4	0	3.3%
Sugar (\$/MT)	406	407	(1)	-0.4%
Rubber (Rs./kg)	185	183	2	0.8%
Baltic Dry Index	2104	2063	41	2.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	88.67	88.62	0.05%
Rs./ Euro	102.31	102.04	0.26%
Rs./Chinese Yuan	12.45	12.45	0.02%
Yen / \$ rate	153.93	153.42	0.33%
\$ US/Euro	1.16	1.16	-0.08%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.65	99.60	0.05%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	25370	57650
Support 2	25220	57130
Resistance	25560	58500

Securities in Ban For Trade
NIL

Market Review

US: Markets closed lower Friday, pressured by more losses in artificial intelligence stocks, to post a losing week as new economic data added to investors' fears of a slowdown.

Asia: Asian shares got a lift on Monday on optimism that an end to the historic U.S. government shutdown could be in sight.

India: Market ended largely flat after a volatile session, with the Sensex closing marginally lower by around 95 points and the Nifty hovering just below the 25,500 level. The flat closing was mainly due to mixed investor sentiment amid ongoing FII selling, coupled with cautious DII support that limited the downside. **Market is expected to open on a flattish note and likely to witness range bound move during the day.**

Global economy:

The U.S. Senate on Sunday moved toward a vote on reopening the federal govt amid optimism that an end to the historic shutdown, now in its 40th day, is within reach. Senators expect a Sunday night vote on advancing a House-passed bill that will be amended to combine the short-term funding measure, which would fund the government through January 2026, with a package of three full-year appropriations bills, Senate Majority Leader John Thune said.

China's producer price index fell 2.1% in Oct from a year earlier, National Bureau of Statistics data showed, compared with an expected 2.2% decline in a Reuters poll of economists. The index has remained negative since Oct'22 and dropped 2.3% in Sep.

Moscow collected 888.6 bn rubles, or \$10.9 bn, in oil and gas taxes, down from about 1.2 tn rubles in Oct 2024. The steep decline came amid weak crude prices, a stronger ruble, and tightening Western sanctions over Russia's invasion of Ukraine.

Commodities: Oil steadied as traders weighed concerns about a glut and fallout from US sanctions against Russia at the start of a data-heavy week.

Gold prices rose on Monday, buoyed by expectations of another Federal Reserve interest rate cut in December and a slew of weak economic data that raised global growth worries.

Currency: The U.S. dollar held firm in early Asian trading on Monday as a string of weak economic data revived global growth worries, though signs that Congress may be edging closer to a deal that could reopen the U.S. government blunted its safety bid.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value
Index Future	14016	2720	28253	5441	(2721)	206735	40031	192998	37392	13737	2639
Index Option	8629212	1651845	8565655	1640222	11623	2153645	413146	1856502	356246	297143	56900
Stock Future	330084	23753	353772	25257	(1504)	6006519	401653	5980291	399482	26228	2171
Stock Option	378696	28033	380854	28174	(141)	442444	30039	415694	28025	26750	2014
Total	9352008	1706351	9328534	1699094	7257	8809343	884869	8445485	821145	363858	63724

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
30-Oct-25	10410	12962	(2553)
31-Oct-25	11949	19536	(7587)
3-Nov-25	10046	11979	(1932)
4-Nov-25	15028	15354	(326)
6-Nov-25	18426	21150	(2724)
Month to date- Nov	43501	48483	(4982)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
31-Oct-25	11532	18301	(6769)
3-Nov-25	9628	11512	(1884)
4-Nov-25	13187	14254	(1067)
6-Nov-25	16791	20054	(3263)
7-Nov-25	18485	13904	4581
Month to date-Nov	58092	59724	(1633)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
31-Oct-25	18634	11565	7068
3-Nov-25	15520	12004	3516
4-Nov-25	15835	14633	1203
6-Nov-25	19419	14135	5284
7-Nov-25	19470	12795	6675
Month to date-Nov	70244	53566	16678
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
30-Oct-25	3513	2597	916
31-Oct-25	3110	1963	1147
3-Nov-25	1589	1252	337
4-Nov-25	3486	3247	240
6-Nov-25	2124	3246	(1123)
Month to date- Nov	7199	7745	(546)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2069	48%	1686	50%
Decline	2105	49%	1605	48%
Unchanged	152	4%	82	2%

Market Turnover	07-Nov	06-Nov	Var (%)
BSE Cash	8649	8731	-1%
NSE Cash	118391	114454	3%
NSE Futures	127279	112271	13%
NSE Options	23418519	11947945	96%
Total (Rs.Cr)	23672838	12183402	94%

Volatility Index	07-Nov	06-Nov
Volatility Index	12.56	12.41

Index PE - TTM	07-Nov	Yr. High	Yr. Low
Sensex	22.6	24.1	20.3
Nifty	22.3	23.0	19.6

Corporate News

The NCLT has approved the scheme of amalgamation, in which **Suzuki Motor Gujarat is being merged with its parent entity, Maruti Suzuki India**. A two-member bench of the Delhi-based Principal bench of NCLT has approved the joint petition and proposed the appointed date for the scheme of amalgamation on April 1, 2025. (ET)

Advent International frontrunner to buy Whirlpool's India arm in likely \$1bn deal. Sale process gets boost after Oct agreements between US parent and local arm; block trades a fallback option for appliances giant if PE talks fail. Advent strives for a third deal in the appliances space in India after CG Consumer and Eureka Forbes. (ET)

Ashoka Buildcon Ltd has received a Letter of Acceptance (LoA) worth ₹539.35 cr from the North Western Railway, Ajmer, for upgrading electric traction systems across key sections of the division. (ET)

Swiggy's board has approved a proposal to raise Rs 10,000 cr through a QIP. The company will now seek shareholder approval for this significant fundraise. This move follows earlier reports of Swiggy's plans to secure fresh capital. (FE)

Economy

CII urges govt to establish India Development and Strategic Fund. The industry body has urged government to set up a professionally managed, sovereign-backed fund to mobilise domestic and global capital and strengthen India's economic and strategic interests by 2047. (ET)

International

Hotel operator Marriott International said its licensing agreement with lodging rentals company Sonder has been terminated due to a default from Sonder. Sonder, which provides apartment-style accommodations, signed an agreement with Marriott in 2024 that sent its shares skyrocketing.

Carmakers have received their first deliveries of chips from Chinese-owned semiconductor manufacturer Nexperia after a supply outage, Volkswagen's China chief told German daily Handelsblatt. The Dutch government had seized control of Nexperia, which is based in the Netherlands, on September 30 as part of a broader U.S.-Chinese trade war, and the Chinese government blocked exports of its products from October 4, leading to a shortage of Nexperia chips widely used by carmakers.

Top 5 Nifty Gainers	07-Nov	06-Nov	Var(%)
ADANIENT	2369	2314	2.4%
BAJFINANCE	1067	1042	2.4%
TATASTEEL	181	177	2.3%
M&M	3690	3619	2.0%
BAJAJFINSV	2102	2063	1.9%
Top 5 Nifty Losers	07-Nov	06-Nov	Var(%)
BHARTIARTL	2001	2095	-4.5%
TATACONSUM	1167	1190	-1.9%
INDIGO	5584	5693	-1.9%
TECHM	1387	1414	-1.9%
APOLLOHOSP	7642	7782	-1.8%

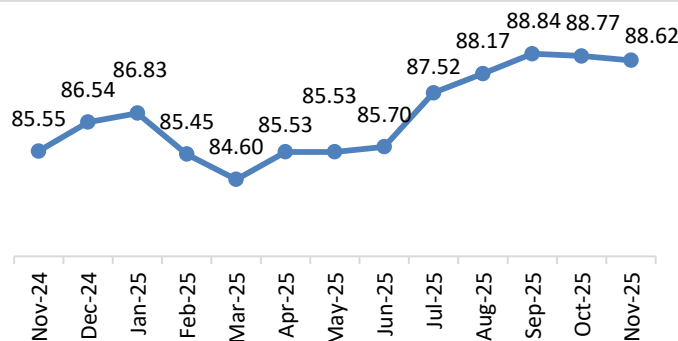
BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	83216	-0.1%	-1.4%	0.9%	4.7%
MIDCAP	46768	0.3%	-1.1%	0.9%	1.5%
SMLCAP	53052	0.0%	-1.9%	-0.6%	-3.4%
AUTO	59775	0.6%	-0.2%	0.2%	10.6%
BANKEK	65013	0.3%	-0.4%	1.8%	10.5%
Capital Goods	69366	-0.2%	-1.1%	-0.3%	-0.2%
FMCG	20362	-0.4%	-1.7%	0.6%	-4.9%
Health Care	44354	-0.3%	-1.1%	-0.7%	0.7%
IT	34427	-0.4%	-2.1%	-1.6%	-18.0%
METAL	34539	1.4%	-2.8%	1.6%	11.5%
Oil & Gas	28653	0.1%	0.3%	4.7%	4.9%
Power	6688	-0.5%	-4.4%	-1.6%	-13.2%
Realty	7354	0.0%	-0.4%	5.6%	-2.7%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	111332	0.9%	2.6%	3.9%	22.1%
Fresh Exposure	3948	-7.2%	-11.8%	5.5%	-31.2%
Exposure liquidated	3349	4.0%	0.1%	16.0%	-33.3%
Closing Net scripwise outstanding	111931	0.5%	2.1%	3.6%	21.8%

NSE USD Futures	07-Nov	06-Nov	Var (%)
Nov Expiry (Rs./\$)	89.76	89.76	0.0%
Dec Expiry (Rs./\$)	87.63	87.63	0.0%
Total Turnover (Rs. Crore)	2536	1787	42%

Sectors	TTM PE
Auto	31.44
Auto Ancillary	41.82
Banking	14.71
Engineering	38.58
Cement	65.38
Diamonds & Jewellery	46.29
Housing Finance	24.05
Infrastructure & Const	26.28
Metals-Aluminium	35.3
Metal – Steel	18.66
Oil Expl.	7.74
Pharma	10.71
Power – Gen. Supp.	38.55
Information Tech.	29.65
Sugar	16.51
Telecom Serv. Prov.	37.68
Tyres	35.68

USD/INR (YoY) (Source: NBRR)



10 year G-Sec Yield	Current	Previous	Change
US	4.13%	4.10%	3 bps
Japan	1.69%	1.68%	1 bps
India	6.51%	6.52%	(0) bps
UK	4.47%	4.43%	3 bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	602	690	-12.7%
Inflation - WPI	0.52%	-0.58%	110 bps
Inflation - CPI	1.54%	2.07%	(53) bps

India GDP	Q3FY25	Q2FY25	Var (%)
Growth	7.81%	7.38%	43 bps

Monetary Policy	Current	Previous	Change
Repo Rate	5.50%	5.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	4.00%	(100) bps
O/S Banking System Liquidity (Rs bn)	2247	1937	309.9

IIP Growth %	Aug-25	Aug-24	Apr-Aug
IIP	4.0	3.2	3.5
Capital Goods	4.4	0.0	6.9
Mining	3.8	1.2	4.2
Manufacturing	4.1	-3.7	0.5
Electricity	6.0	-4.3	-2.5

ADR Price Movement

Company	Price (US\$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	16.50	8094528	16.18	10341644	1.98%	1	1462.97	1476.80	-0.9%
Wipro	2.60	9325284	2.61	4585069	-0.38%	1	230.53	236.49	-2.5%
Dr.Reddy's	13.46	911132	13.47	1093329	-0.07%	1	1193.43	1205.40	-1.0%
ICICI Bank	30.23	4578759	29.87	7524262	1.21%	2	1340.17	1343.00	-0.2%
HDFC Bank	35.81	3479151	35.69	4087544	0.34%	3	1058.36	982.30	7.7%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	43.80	43.95	(0.2)	-0.3%
RIL	66.10	66.80	(0.7)	-1.0%
SBI	107.40	108.20	(0.8)	-0.7%

US Economy Data	Current	Previous
Inflation (%) (YoY)	3.00%	2.90%
Unemployment (%)	4.30%	4.20%

Interest Rate (%)	Current	Previous
Fed Rate	4.00%	4.25%

US GDP	Q2CY25	Q1CY25
Growth (QoQ Annualized)	3.80%	-0.60%

China Economy Data	Current	Previous
GDP	4.80%	5.20%
Inflation – CPI (%)	-0.30%	-0.40%

Economic Calendar

	Date
Indian GDP Data	28 Nov
Indian Inflation Data CPI	12 Nov
Indian Inflation Data WPI	14 Nov
Indian Monetary Policy	05 Dec
India's Industrial Production (IIP)	28 Nov
US Inflation Data	13 Nov
US GDP	26 Nov
US Unemployment Data	07 Nov
US Fed Rate	10 Dec
China GDP	To be Announced
China Inflation Data	09 Nov

Event Update

Name	Date	Purpose
Ajanta Pharma Ltd.	10/11/25	First Interim Dividend
Aurionpro Solutions Ltd.	10/11/25	Rs.1.00 per share(10%)Second Interim Dividend
Godfrey Phillips India Ltd.	10/11/25	Rs.17.00 per share(850%)Interim Dividend
Power Grid Corporation Of India Ltd.	10/11/25	First Interim Dividend
Route Mobile Ltd.	10/11/25	Rs.3.00 per share(30%)Second Interim Dividend
Transcorp International Ltd.	10/11/25	Rs.0.20 per share(10%)Interim Dividend
Chalet Hotels Ltd.	11/11/25	Rs.1.00 per share(10%)Interim Dividend
Chambal Fertilisers and Chemicals Ltd.	11/11/25	Rs.5.00 per share(50%)Interim Dividend
Garden Reach Shipbuilders & Engineers Ltd.	11/11/25	Rs.5.75 per share(57.5%)Interim Dividend
Indian Metals & Ferro Alloys Ltd.	11/11/25	Interim Dividend
Nuvama Wealth Management Ltd.	11/11/25	Rs.70.00 per share(700%)Interim Dividend
Sampre Nutritions Ltd.	11/11/25	Bonus issue
Siyaram Silk Mills Ltd.	11/11/25	Rs.4.00 per share(200%)First Interim Dividend
Steelcast Ltd.	11/11/25	Second Interim Dividend
Allcargo Gati Ltd.	12/11/25	Amalgamation
Allcargo Logistics Ltd.	12/11/25	Spin Off
Global Education Ltd.	12/11/25	Dividend
Sagility Ltd.	12/11/25	Rs.0.05 per share(0.5%)Interim Dividend
Symphony Ltd.	12/11/25	Second Interim Dividend
ADF Foods Ltd.	13/11/25	Interim Dividend
Patanjali Foods Ltd.	13/11/25	Interim Dividend
Sasken Technologies Ltd.	13/11/25	Interim Dividend
Anzen India Energy Yield Plus Trust.	14/11/25	Income Distribution (InvIT)
Birlasoft Ltd.	14/11/25	Interim Dividend

Bulk Deal As On 07/11/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
542012	A1L	MINERVA VENTURES FUND	B	66500	1655.45
539562	AARNAV	KHETAWAT WEALTH MANAGEMENT PRIVATE LIMITED	S	313190	49.17
539562	AARNAV	RAKESH RAJKRISHAN AGGARWAL	B	792000	48.92
539773	ADVIKCA	FAIRPLAN DISTRIBUTORS PRIVATE LIMITED	B	7000000	1.43
539773	ADVIKCA	ORCHARD ROAD PROPERTIES PVT LT	S	7000000	1.43
543926	BIZOTIC	AKSHAR IMPEX PRIVATE LIMITED	B	42400	710.39
540829	CHANDRIMA	PARNIT VENTURES PRIVATE LIMITED	B	3006212	10.42
540829	CHANDRIMA	PRAS INVESTMENT PRIVATE LIMITED	S	2253000	10.42
542678	CHCL	PRADEEPCHOWDARYVEERAMACHINENI	B	132000	7.5
512301	CHMBBRW	EPITOME TRADING AND INVESTMENTS	S	65962	45.86
512301	CHMBBRW	EPITOME TRADING AND INVESTMENTS	B	20000	45.87
512301	CHMBBRW	GREEN PEAKS ENTERPRISES LLP	B	40000	45.87
512301	CHMBBRW	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	100000	45.86
512301	CHMBBRW	SONALI CHINTAN SHAH	B	75000	45.86
532217	CMXLTD	NEO APEX SHARE BROKING SERVICES LLP	S	125000	34.91
532175	CYIENT	AMANSA HOLDINGS PRIVATE LIMITED	S	944693	1101.23
544540	EPACKPEB	IRAGE BROKING SERVICES LLP	S	560003	332.77
544540	EPACKPEB	IRAGE BROKING SERVICES LLP	B	291931	334.99
543500	EVOQ	JANAKI BOOPALAN RAJESWARI	B	164000	4.26
512443	GANONPRO	PANKAJ KUMAR	B	71000	17
531913	GOPAIST	RAMESH RAVI	S	107392	6.15
531913	GOPAIST	VKR COMMERCIAL LLP	B	105000	6.15
544548	GPAPL	ALAKH VASANTBHAI MANGROLIYA	B	54400	91.74
532216	HBSL	ANKITA VISHAL SHAH	S	63576	99.98
532216	HBSL	ANKITA VISHAL SHAH	B	576	97.83
532216	HBSL	D3 STOCK VISION LLP	S	7906	98.15
532216	HBSL	D3 STOCK VISION LLP	B	47906	99.98
513361	INDIAHOMES	SEEMA JAIN	S	5101175	12.21
540360	LLFICL	ZEAL GLOBAL OPPORTUNITIES FUND	S	5000000	5.48
512415	MERCTRD	SHITAL BHAVESHKUMAR SHAH	S	92658	8.05
530805	OIVL	D3 STOCK VISION LLP	B	325000	9.52
543400	OMNIPOTENT	HEMANT NARESH JAIN HUF	S	58000	5.33
540386	ONTIC	AKALPYA INDIA EQUITY FUND	B	776703	2.91
540386	ONTIC	SHARE INDIA SECURITIES LIMITED	S	97878	2.91
540386	ONTIC	SHARE INDIA SECURITIES LIMITED	B	500000	2.92
531512	ORIENTTR	AKARSHIKA TRADERS LLP	B	109428	21.49
531512	ORIENTTR	KARAN SURESHCHANDRA MAJITHIA	B	120403	22.27
531512	ORIENTTR	SUNAYANA INVESTMENT COMPANY LIMITED	S	144068	21.5
539921	SEIL	NECTA BLOOM VCC - NECTA BLOOM ONE	B	1612182	110
544585	SIHORA	JIGNESH JASMATBHAI LAKHANI	S	36000	66.44
544585	SIHORA	RCSPL SHARE BROKING PRIVATE LIMITED	S	40000	66.31
531205	SPRIGHT	FIELDSJOY ENTERPRISE PRIVATE LIMITED	S	9387512	0.7
531205	SPRIGHT	PLANTFLOW TRADE PRIVATE LIMITED	S	37620761	0.7
539117	SUJALA	NIRAJ RAJNIKANT SHAH	B	34720	74.54
517201	SWITCHTE	OMKARMUNDHRA	B	12500	62.73
544594	TRADEUNO	RACHITGOEL	B	294000	112
538610	UNISON	KAUSHIKKUMAR SHIVRAMBHAI PATEL	B	159332	23.59
500426	UTLINDS	ARINDAM DE	S	265736	2.55
500426	UTLINDS	ARINDAM DE	B	166605	2.31
544565	VALPLAST	MAHALAXMI BROKERAGE (INDIA) PRIVATE LIMITED	B	100000	59
542803	VEL	VIVEK VIJAYPAL GUPTA	B	49812	37.06
524661	WELCURE	MODUPALLI RAMESH	S	8300000	0.55

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
AAATECH	AAA Technologies Limited	ANJAY RATANLAL AGARWAL	SELL	350000	91.3
AAATECH	AAA Technologies Limited	NAUTILUS PRIVATE CAPITAL LTD	BUY	350000	91.3
BAGDIGITAL	B.A.G.Convergence Limited	ACME CAPITAL MARKET LIMITED	BUY	206400	124.96
BAGDIGITAL	B.A.G.Convergence Limited	LOVLESH JAIN	SELL	200000	124.99
BHARTIARTL	Bharti Airtel Limited	PASTEL LIMITED	SELL	51000000	2030.37
DAMCAPITAL	Dam Capital Advisors Ltd	CHARTERED FINANCE & LEASING LIMITED	SELL	474562	266.01
GSLSU	Global Surfaces Limited	SHRI BAJRANG COMMODITY	BUY	407000	127.56
ORICONENT	Oricon Enterprises Ltd	MARWADI CHANDARANA INTERMEDIARIES BROKERS PRIVATE LIMITED	BUY	851065	55.11
PARTH	Parth Elec & Eng Ltd	INDIA MAX INVESTMENT FUND LIMITED	SELL	86400	252.92
RELIABLE	Reliable Data Service Ltd	ANSU INVESTMENT	SELL	55700	137.51
RNPL	Renol Polychem Limited	DARSHAN KIRTIKUMAR SHAH	BUY	50400	135.66
RNPL	Renol Polychem Limited	L7 HITECH PRIVATE LIMITED	SELL	50400	135.5
RNPL	Renol Polychem Limited	MONEYCREW FINTEC PRIVATE LIMITED	BUY	50400	135.75
RNPL	Renol Polychem Limited	NAVRATRI SHARE TRADING PRIVATE LIMITED	SELL	50400	135.78
VIJAYPD	Vijaypd Ceutical Limited	BADAMI NARPATCHAND JAIN	BUY	192000	44

Disclosure:

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