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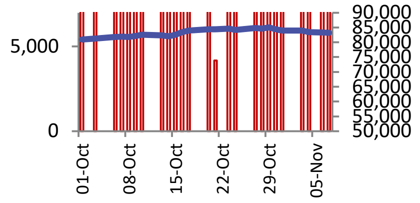
12th November, 2025

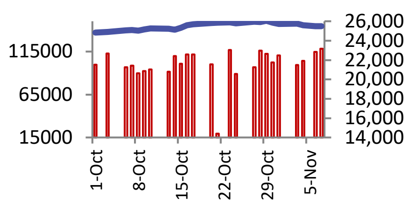
Daily Report

BSE



Open	83672
High	83936
Low	83124
Close	83871
Change	336
Volume (Lacs)	7191
Turnover (Rs.inCr)	8340

NSE



Open	25617
High	25716
Low	25449
Close	25695
Change	121
Volume(Lacs)	51122
Turnover(Rs.in Cr)	104375

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	47928	47369	559	1.18%
Dow Futures	48056	48030	26	0.05%
Nasdaq	23468	23527	(59)	-0.25%
FTSE	9900	9787	112	1.15%
Nikkei	50927	50843	84	0.17%
Hang Seng	26888	26696	192	0.72%
Gift Nifty	25950	25820	130	0.50%
Straits Singapore	4555	4542	12	0.27%
South Korea	4135	4106	28	0.69%
Taiwan	27957	27785	172	0.62%
Shanghai	4008	4003	5	0.12%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper ($/MT)	10827	10796	31	0.3%
Alumin ($/MT)	2875	2870	5	0.2%
Zinc ($/MT)	3067	3081	(15)	-0.5%
Brent Crude ($/bbl)	65	65	(0)	-0.2%
Gold ($/Ounce)	4124	4127	(3)	-0.1%
Silver ($/Ounce)	51	51	0	0.0%
Light Crude ($/bbl)	61	61	(0)	-0.3%
N G ($/mmbtu)	5	5	(0)	-0.2%
Sugar ($/MT)	409	408	1	0.3%
Rubber (Rs./kg)	186	185	1	0.5%
Baltic Dry Index	2072	2084	(12)	-0.6%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./$ rate	88.57	88.70	-0.15%
Rs./ Euro	102.44	102.61	-0.16%
Rs./Chinese Yuan	12.44	12.44	-0.04%
Yen /$ rate	154.35	154.16	0.12%
$ US/Euro	1.16	1.16	-0.03%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.54	99.44	0.10%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	25520	58000
Support 2	25350	57670
Resistance	25890	58750

Securities in Ban For Trade
SAIL

Market Review

US: The Dow Jones Industrial Average surged to a record high close on Tuesday, lifted by progress toward ending the longest U.S. government shutdown, while Nvidia and other artificial intelligence-related companies fell on renewed concerns about elevated valuations.

Asia: Stocks tiptoed forward at the start of Asian trading on Wednesday as the U.S. Congress looked set to end the federal shutdown and traders looked for direction in the absence of clues from government data services.

India: On Tuesday, the Indian stock market extended gains to the second consecutive session and ended with decent gains. The Sensex rallied 335.97 points, or 0.40%, to close at 83,871.32, while the Nifty 50 settled 120.60 points, or 0.47%, higher at 25,694.95. **Market is expected to open on a gap up note and likely to witness positive move during the day.**

Global economy:

US President Donald Trump said his **administration plans to lower the high tariffs levied against India**, as New Delhi has “stopped” the Russian oil purchase. According to reports, Trump also said that Washington is close to a “fair deal” with New Delhi.

US companies shed 11,250 jobs per week on average in the four weeks ended Oct 25, according to data released by ADP Research. The figures suggest the labor market slowed in the second half of Oct, compared with earlier in the month.

China is making good on its pledge to crack down on chemicals that can be used to make fentanyl, a key issue for President Trump during recent talks with Chinese leader Xi Jinping as they aimed to take steps to ease a trade war. Beijing announced new export restrictions on 13 “drug-making” chemicals to the US, Canada and Mexico, including those that are used to produce the synthetic opioid blamed for tens of thousands of overdose deaths in the U.S. every year.

Commodities: Oil prices were little changed on Wednesday after rising in the previous session amid expectations that an end to the longest-ever U.S. government shutdown could boost demand in the world's biggest crude consuming nation.

Gold rose for a fourth straight session on Wednesday, supported by a weaker dollar and expectations that the reopening of the U.S. government and flow of economic data will strengthen bets for an interest rate cut from the Federal Reserve next month.

Currency: The dollar eased on Wednesday after private-sector U.S. jobs data stoked worries about the health of the labour market, with investors also bracing for an imminent U.S. government reopening that is expected to unleash a backlog of economic releases.

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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	11226	2186	14349	2798	(612)	214132	41828	211865	41201	2267	627
Index Option	17909182	3443499	17858449	3434482	9017	1475491	285864	2317736	446007	(842245)	(160143)
Stock Future	317340	22009	321208	21988	21	5988672	403512	5997322	403048	(8650)	464
Stock Option	414717	29488	412342	29282	206	481183	32690	464916	31527	16267	1163
Total	**18652465**	**3497182**	**18606348**	**3488550**	**8632**	**8159478**	**763894**	**8991839**	**921783**	**(832361)**	**(157889)**

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
3-Nov-25	10046	11979	(1932)
4-Nov-25	15028	15354	(326)
6-Nov-25	18426	21150	(2724)
7-Nov-25	22237	14498	7739
10-Nov-25	9384	14419	(5035)
Month to date- Nov	**75122**	**77400**	**(2278)**
FII (Prov.) (Rs Cr)	**Buy**	**Sell**	**Net**
4-Nov-25	13187	14254	(1067)
6-Nov-25	16791	20054	(3263)
7-Nov-25	18485	13904	4581
10-Nov-25	9804	13918	(4115)
11-Nov-25	14487	15291	(803)
Month to date-Nov	**82383**	**88933**	**(6551)**
DII (Prov.) (Rs. Cr)	**Buy**	**Sell**	**Net**
4-Nov-25	15835	14633	1203
6-Nov-25	19419	14135	5284
7-Nov-25	19470	12795	6675
10-Nov-25	18934	13129	5805
11-Nov-25	14833	12645	2188
Month to date-Nov	**104011**	**79339**	**24672**
FII Debt - BBG (Rs. Cr)	**Buy**	**Sell**	**Net**
3-Nov-25	1589	1252	337
4-Nov-25	3486	3247	240
6-Nov-25	2124	3246	(1123)
7-Nov-25	2430	3774	(1344)
10-Nov-25	4824	1515	3309
Month to date- Nov	**14453**	**13034**	**1419**

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1898	43%	1680	50%
Decline	2294	52%	1615	48%
Unchanged	181	4%	90	3%

Market Turnover	11-Nov	10-Nov	Var (%)
BSE Cash	8340	8012	4%
NSE Cash	104375	101318	3%
NSE Futures	112687	90561	24%
NSE Options	66095683	24535951	169%
Total (Rs.Cr)	66321086	24735842	168%

Volatility Index	11-Nov	10-Nov
Volatility Index	12.49	12.30

Index PE - TTM	11-Nov	Yr. High	Yr. Low
Sensex	22.8	24.1	20.3
Nifty	22.4	23.0	19.6

Corporate News

Bharat Forge's arm, Kalyani Strategic Systems, has received orders worth over Rs 250 cr from the Defence Ministry for the supply of underwater system. (ET)

Basf India has signed a share purchase agreement with Clean Max Enviro Energy Solutions to acquire a 26% stake in Clean Max Amalfi. (FE)

Panacea Biotech has received an order worth nearly Rs 41 cr for the supply of the Easyfive-TT vaccine. (MC)

Reliance Power's arm Reliance NU Energies gets letter of award from SJV for 750 MW / 3000 MWh renewable energy at tariff of Rs 6.74/KWh and Board Approves Seeking Shareholder Nod to Raise Up To $600 Mn Via Bonds. (Mint)

Tata Power is acquiring a 40% stake in an SPV to develop a hydropower project worth nearly Rs 13,100 cr. (ET)

Economy

UBS expects India's nominal GDP growth to decelerate to 8.5% in FY26, lowest since FY20 (excluding the pandemic), with space for another 25 bps rate cut by RBI in FY26, before a pause in FY27. (ET)

Bihar exit polls forecast a return to power for the NDA, projecting a clear majority with 130–160 seats, while the Mahagathbandhan is expected to secure only 70–100 seats. The Bihar legislative assembly has 243 seats, and 122 seats are needed for a simple majority. The Bihar election results will be announced on Nov 14. (ET)

International

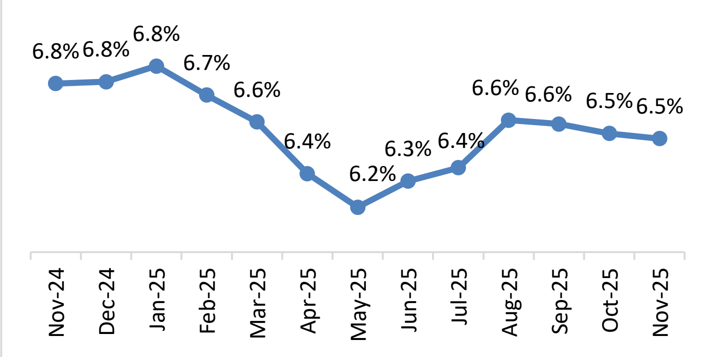
Amazon lays off almost 700 NYC-based corporate employees. Among them, the largest layoffs affect Amazon's Manhattan West office and its New York Tech Hub, also based in Manhattan. (Inv)

Japan's SoftBank Group said it had sold all its stake in Jensen Huang's **Nvidia**, pocketing a massive $5.83 bn with the sale, as the Masayoshi Son-led company looks to increase its AI bet significantly. (Inv)

Daily Report

Top 5 Nifty Gainers	11-Nov	10-Nov	Var(%)
INDIGO	5783	5589	3.5%
BEL	427	417	2.5%
M&M	3749	3664	2.3%
ADANIPORTS	1474	1445	2.0%
HCLTECH	1570	1541	1.9%
Top 5 Nifty Losers	**11-Nov**	**10-Nov**	**Var(%)**
BAJFINANCE	1005	1085	-7.4%
BAJAJFINSV	1989	2118	-6.1%
ONGC	249	251	-0.8%
TMPV	408	410	-0.7%
APOLLOHOSP	7501	7530	-0.4%

India 10 year bond yield (Source: NBRR)



BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	83871	0.4%	-0.1%	1.7%	6.6%
MIDCAP	47152	0.2%	-0.4%	1.7%	4.2%
SMLCAP	52853	-0.1%	-2.6%	-1.0%	-1.4%
AUTO	60542	1.0%	1.0%	1.5%	15.0%
BANKEX	65231	0.4%	-0.2%	2.1%	11.8%
Capital Goods	71062	1.2%	0.8%	2.2%	4.9%
FMCG	20386	0.2%	-1.3%	0.8%	-2.3%
Health Care	44229	-0.3%	-1.8%	-1.0%	2.4%
IT	35342	1.1%	1.1%	1.0%	-16.6%
METAL	34940	0.6%	-0.9%	2.8%	15.6%
Oil & Gas	28872	0.7%	-0.1%	5.5%	7.7%
Power	6712	0.4%	-3.1%	-1.2%	-10.6%
Realty	7319	-0.2%	-2.8%	5.1%	-3.2%

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	111403	-0.5%	1.3%	3.3%	21.3%
Fresh Exposure	3735	14.5%	-8.5%	-2.0%	-23.5%
Exposure liquidated	3624	-3.8%	-4.1%	-7.3%	-35.0%
Closing Net scripwise outstanding	111514	0.1%	1.1%	3.5%	22.3%

NSE USD Futures	11-Nov	10-Nov	Var (%)
Nov Expiry (Rs./$)	87.63	87.63	0.0%
Dec Expiry (Rs./$)	87.93	87.93	0.0%
Total Turnover (Rs. Crore)	1382	1585	-13%

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

10 year G-Sec Yield	Current	Previous	Change
US	4.08%	4.12%	(4) bps
Japan	1.69%	1.69%	0 bps
India	6.48%	6.49%	(1) bps
UK	4.39%	4.46%	(7) 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

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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	17.01	9370530	16.76	9890275	1.49%	1	1506.51	1530.30	-1.6%
Wipro	2.67	3804734	2.62	4862219	1.91%	1	236.47	241.69	-2.2%
Dr.Reddy's	13.81	941858	13.52	737805	2.14%	1	1223.10	1211.50	1.0%
ICICI Bank	30.77	4636109	30.35	4234026	1.38%	2	1362.59	1358.30	0.3%
HDFC Bank	36.70	2600905	36.07	2416990	1.75%	3	1083.46	991.70	9.3%

GDR's (US$)				
	Prices	Prev. Close	Change	Var %
L&T	45.05	44.00	1.1	2.4%
RIL	67.60	66.80	0.8	1.2%
SBI	108.40	107.00	1.4	1.3%

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
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
Websol Energy System Ltd.	14/11/25	Stock Split from Rs.10/- to Re.1/-
Gopal Snacks Ltd.	17/11/25	First Interim Dividend

Bulk Deal As On 11/11/25

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
513401	ASHIS	CHANDRAKANT RAMANLAL VAIDYA	B	95000	21
513401	ASHIS	GARIMA SHARMA	B	81496	21
513401	ASHIS	MAGNUM HEALTH AND SAFETY PRIVATE LIMTED	S	133994	21
513401	ASHIS	RAKHEE RAKESH BHAGAT	S	82680	21
542627	CHANDNIMACH	ARTHAWAVE WEALTH MANAGEMENT PRIVATE LIMITED	S	17100	110.37
540829	CHANDRIMA	NEO APEX VENTURE LLP	S	3000000	10.83
540829	CHANDRIMA	PRAS INVESTMENT PRIVATE LIMITED	B	7377516	10.83
532217	CMXLTD	NEO APEX SHARE BROKING SERVICES LLP	S	71077	38.48
533452	DELPHIFX	G G ENGINEERING LIMITED	S	74450	198.7
533452	DELPHIFX	GI ENGINEERING SOLUTIONS LIMITED	B	75000	198.7
539596	DELTA	MONIKA UDAY SHAH	S	40500	14.03
544548	GPAPL	ALAKH VASANTBHAI MANGROLIYA	S	83200	92.73
541627	GUJWIND	BLISS ENTERPRISE	S	48000	7.2
541627	GUJWIND	SHASHANK CHOUDHARY	B	25000	7.2
540134	IISL	SHIV SHAKTI TRADING COMPANY	S	67000	10.91
540134	IISL	UDD ENTERPRISES LLP	B	68637	10.91
544160	JAYKAILASH	LORENZINI APPARELS LIMITED	S	80000	39.43
544524	JDCABLES	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	S	152800	154.09
544524	JDCABLES	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	B	153600	154.32
543289	KGES	CELESTIAL TRADECHEM PRIVATE LIMITED	B	39000	62.4
543289	KGES	N L RUNGTA (HUF)	S	24000	62.58
543289	KGES	RAHUL ANANTRAI MEHTA	S	12000	61.55
543289	KGES	RUCHIRA GOYAL	S	24000	62.52
537707	LADDU	KAMAL D MEHTA (HUF)	S	704500	1.51
537707	LADDU	VICKY R JHAVERI HUF	S	1000000	1.51
537707	LADDU	VICKY RAJESH JHAVERI	S	1000000	1.51
544400	MANOJJEWEL	SHRENI SHARES LTD	S	68000	53.9
535910	MMLF	SONAL ANIL VICHARE	S	760230	1.1
543207	NATURAL	ARUNKUMAR DASHRATHBHAI PRAJAPATI HUF	S	284132	5.91
543798	PATRON	SNEH HIRJI GADA	S	176000	4
539669	RGF	MANI MARKETING & HOLDINGS PRIVATE LIMITED	S	2000000	0.75
539669	RGF	ROCKSOLID INVESTMENTS	B	1000000	0.75
511577	SAVFI	DINA BHAVESH MAMNIA	S	23427	16.97
511577	SAVFI	VIMLA PREMJI MAMNIA	B	32500	16.91
539921	SEIL	ALTITUDE INVESTMENT FUND PCC - CELL 1	B	2727270	110
531205	SPRIGHT	GAUTAM RAJ	B	6500000	0.67
531205	SPRIGHT	PLANTFLOW TRADE PRIVATE LIMITED	S	10283261	0.64
531205	SPRIGHT	PRAJSS CROPTRADE ENTERPRISE PRIVATE LIMITED	S	10000000	0.64
539117	SUJALA	ARYAN SHARE & STOCK BROKERS LTD	B	50000	69.12
539117	SUJALA	MONEY MANAGERS	S	100000	69.12
539117	SUJALA	VAJRA CAPITAL	B	30000	69.12
543745	SVS	ALTIZEN VENTURES LLP	S	498000	12.35
543745	SVS	KALPNA KIRIT PAREKH	B	228000	12.35
543745	SVS	KIRIT PREAMCHAND PAREKH	B	252000	12.35
530217	SWOJAS	DEALMONEY COMMODITIES PRIVATE LIMITED	B	281000	15.67
530217	SWOJAS	SHUBHAM ASHOKBHAI PATEL	S	300000	15.64
521005	TITANIN	ASHOK KUMAR SUREKA	B	2000000	2.67
544508	VASHISHTHA	ASHWINI NIRAJ SINGH	S	32400	155.43

NSE					
Security Code	**Security Name**	**Client Name**	**Deal**	**Quantity**	**Price**
ACTIVEINFR	Active Infrastructures Li	KINGSTONE FUND OPEN-ENDED PROTECTED CELL CO. LIMITED-KING	BUY	130200	179
ANNAPURNA	Annapurna Swadisht Ltd	VARANIUM CAPITAL ADVISORS PRIVATE LIMITED	BUY	230000	273.54
ATALREAL	Atal Realtech Limited	L7 HITECH PRIVATE LIMITED	BUY	572500	24.97
BLISSGVS	Bliss GVS Pharma Ltd	APURVA MAHESH SHAH	BUY	540000	157.59
CUBEINVIT	Cube Highways Trust	ANIL ARORA	BUY	7375000	135.5
EXXARO	Exxaro Tiles Limited	DEEP DIAMOND INDIA LIMITED	BUY	8372073	9.38
EXXARO	Exxaro Tiles Limited	SARVOSHREE IRON WORKS LLP	SELL	2650317	9.98
GANGAFORGE	Ganga Forging Limited	HIRALAL MAHIDAS TILVA	SELL	881949	3.35
GANGAFORGE	Ganga Forging Limited	RAKESH CHHAGANLAL PATEL	SELL	800000	3.36
GLOBE	GLOBE ENTERPRISE (I) LT	BHAVIK SURYAKANT PARIKH	BUY	4500000	2.83
HFCL	HFCL Limited	KOTAK MAHINDRA MUTUAL FUND	BUY	7494900	78.45
IEML-RE	Indian Emulsifers Ltd	ANKIT SINGHVI	BUY	33750	29.88
IEML-RE	Indian Emulsifers Ltd	DEEPAK SHIVDHANI MISHRA	BUY	42000	30.4
IEML-RE	Indian Emulsifers Ltd	SUSHANT CHANDRAKANT SHAMBHARKAR	BUY	121000	30.54
JAYBEE	Jay Bee Laminations Ltd	VARANIUM CAPITAL ADVISORS PRIVATE LIMITED	BUY	135000	145.28
MGEL	Mangalam Global Ent Ltd	CHUNGATH KARUNAKARAN PADMA KUMAR	BUY	2898800	13.75
MGEL	Mangalam Global Ent Ltd	CHUNGATH KARUNAKARAN PADMA KUMAR	BUY	3625000	13.75
NIRMAN	Nirman Agri Gentics Ltd	VAGHANI VIRAJ	BUY	114000	70
POSITRON	Positron Energy Limited	VENTUREX FUND I	BUY	66000	318.66
ROCK-RE	Rockingdeals Cir Eco Ltd	PRAMOD VERMA	BUY	20000	15.85
TAURIAN	Taurian MPS Limited	MOHIT KUMAR MATHUR	BUY	60000	337.7
VIPULLTD	Vipul Limited	HARISHCHANDRASINH N UMAT	BUY	734300	9.18
ZIMLAB	Zim Laboratories Limited	ELIMATH ADVISORS PRIVATE LIMITED	BUY	3840000	73.47
ZIMLAB	Zim Laboratories Limited	ELIZABETH MATHEW	SELL	3840000	73.45

Disclosure:

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