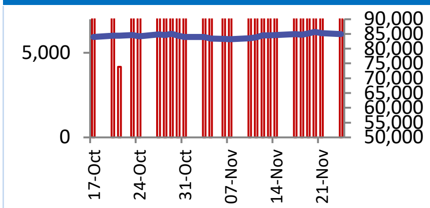
Daily Report

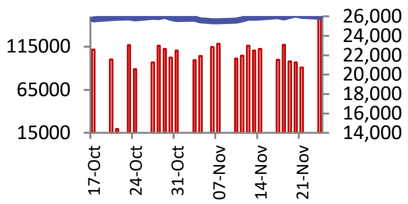
27th November, 2025

BSE



Open	84503
High	85644
Low	84478
Close	85610
Change	1023
Volume (Lacs)	6807
Turnover (Rs.inCr)	7091

NSE



Open	25843
High	26215
Low	25843
Close	26205
Change	321
Volume(Lacs)	34969
Turnover(Rs.in Cr)	94725

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	47427	47112	315	0.67%
Dow Futures	47521	47490	31	0.07%
Nasdaq	23215	23026	189	0.82%
FTSE	9692	9610	82	0.85%
Nikkei	50203	49559	644	1.30%
Hang Seng	26012	25928	84	0.32%
Gift Nifty	26427	26388	39	0.15%
Straits Singapore	4513	4502	12	0.26%
South Korea	3995	3961	34	0.85%
Taiwan	27608	27410	198	0.72%
Shanghai	3886	3864	21	0.56%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper ($/MT)	10975	10818	157	1.5%
Alumin ($/MT)	2861	2801	61	2.2%
Zinc ($/MT)	3057	2993	64	2.1%
Brent Crude ($/bbl)	63	63	(0)	-0.5%
Gold ($/Ounce)	4153	4162	(9)	-0.2%
Silver ($/Ounce)	53	53	(0)	-0.7%
Light Crude ($/bbl)	58	59	(0)	-0.5%
N G ($/mmbtu)	5	5	0	1.4%
Sugar ($/MT)	434	428	6	1.3%
Rubber (Rs./kg)	185	185	0	0.0%
Baltic Dry Index	2401	2309	92	4.0%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./$ rate	89.27	89.22	0.06%
Rs./ Euro	103.31	102.92	0.38%
Rs./Chinese Yuan	12.61	12.62	-0.06%
Yen /$ rate	156.06	156.47	-0.26%
$ US/Euro	1.16	1.16	0.16%

Dollar Index	Current	Previous	Var(%)
Dollar Index	99.44	99.60	-0.16%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	26000	59430
Support 2	25900	59000
Resistance	26300	60000

Securities in Ban For Trade
NIL

Market Review

US: US stocks climbed on Wednesday as Wall Street looked to stretch its winning run, buoyed by growing expectations of a Fedl Reserve rate cut in December.

Asia: Asian shares followed Wall Street higher as a global equities rally extended, fueled by rising expectations for Federal Reserve interest-rate cuts.

India: Indian equity benchmarks wrapped up Wednesday's session near record levels, buoyed by broad-based buying across sectors. Sectoral performance was uniformly positive, with all indices ending higher. **Market is expected to open on a positive note and likely to witness positive move during the day.**

Global economy: The number of Americans filing new applications for unemployment benefits fell to a seven-month low last week, suggesting layoffs remained low, though the labor market is struggling to generate enough jobs for those out of work amid economic uncertainty.

New orders for key U.S.-manufactured capital goods surged in September and shipments of these goods increased solidly, cementing economists' expectations that economic growth accelerated in the third quarter. Non-defense capital goods orders excluding aircraft, a closely watched proxy for business spending, jumped 0.9% after an upwardly revised 0.9% increase in August.

Canada will offer more support to help the steel and lumber industries deal with U.S. tariffs and create a domestic market, Prime Minister Mark Carney said. The government has also increased protection for steel and lumber workers, Carney told a press conference.

Commodities:

Oil prices fell on Thursday on expectations of a Ukraine-Russia ceasefire which could pave the way for the unwinding of Western sanctions against Russian supply, though trading was set to remain thin due to the U.S. Thanksgiving holiday.

Gold prices remained steady on Thursday after hitting a more than one-week high in the previous session, as market participants weighed the possibility of an interest rate cut in Dec amid conflicting signals from the U.S. Federal Reserve.

Currency:

The dollar was on the back foot on Thursday, with trade thinned ahead of the U.S. Thanksgiving holiday and investors turning to the coming year where a series of U.S. interest rate cuts are priced in.

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	21214	4225	17272	3435	790	138271	27435	135529	26574	2742	861
Index Option	4628400	904203	4662320	911062	(6859)	1770657	348962	1358808	264788	411849	84174
Stock Future	274975	18862	241605	17084	1778	5737347	391768	5740519	385989	(3172)	5779
Stock Option	228696	16435	237124	17067	(632)	160033	10749	96441	6271	63592	4478
Total	**5153285**	**943725**	**5158321**	**948648**	**(4923)**	**7806308**	**778914**	**7331297**	**683622**	**475011**	**95292**

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
19-Nov-25	17002	13768	3234
20-Nov-25	15255	14805	450
21-Nov-25	22237	14498	7739
24-Nov-25	56721	60572	(3851)
25-Nov-25	16728	15753	975
Month to date- Nov	**314492**	**305831**	**8661**
FII (Prov.) (Rs Cr)	**Buy**	**Sell**	**Net**
20-Nov-25	14770	14486	284
21-Nov-25	14586	16352	(1766)
24-Nov-25	54505	58677	(4172)
25-Nov-25	16596	15811	785
26-Nov-25	16232	11454	4778
Month to date-Nov	**287137**	**299586**	**(12449)**
DII (Prov.) (Rs. Cr)	**Buy**	**Sell**	**Net**
20-Nov-25	13052	12227	824
21-Nov-25	14909	11747	3162
24-Nov-25	20445	15933	4513
25-Nov-25	15153	11241	3912
26-Nov-25	16334	10086	6248
Month to date-Nov	**287950**	**218956**	**68994**
FII Debt - BBG (Rs. Cr)	**Buy**	**Sell**	**Net**
19-Nov-25	1658	2569	(911)
20-Nov-25	1965	2030	(65)
21-Nov-25	2430	3774	(1344)
24-Nov-25	2027	2974	(946)
25-Nov-25	1352	2648	(1296)
Month to date- Nov	**35783**	**36050**	**(266)**

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2721	63%	2522	72%
Decline	1453	34%	884	25%
Unchanged	162	4%	82	2%

Market Turnover	26-Nov	25-Nov	Var (%)
BSE Cash	7091	6647	7%
NSE Cash	94725	87714	8%
NSE Futures	101228	278337	-64%
NSE Options	10765544	68789897	-84%
Total (Rs.Cr)	10968588	69162594	-84%

Volatility Index	26-Nov	25-Nov
Volatility Index	11.97	12.24

Index PE - TTM	26-Nov	Yr. High	Yr. Low
Sensex	23.4	24.1	20.3
Nifty	22.8	23.0	19.6

Corporate News

Asian Paints Ltd said its step-down subsidiary, Berger Paints Emirates Ltd Co (LLC), UAE, plans to set up its second paint manufacturing facility in the UAE. The project involves an investment of AED 140 mn and will have an initial production capacity of 55,800 KL per annum. (CNBC)

M & B Engineering has secured, through its wholly owned subsidiary M/s. Phenix Construction Technologies INC., USA, an export order worth USD 7.53 mn (Rs 67.12 cr) for design, manufacturing and supply of Pre-Engineered Building/ Structural steel to its customer in the USA. (CM)

Mumbai-based, listed real estate developer Oberoi Realty, announced that it will redevelop a land parcel measuring 4,706 sq m in South Mumbai's Nepean Sea Road. The company announcement, it has entered into a Development Agreement for the redevelopment of land and measuring 4,706 square meters, situated at Nepean Sea Road, Mumbai. (HT)

Ashoka Buildcon Ltd said its material subsidiary, Ashoka Concessions Ltd (ACL), has sold its entire share capital in five special purpose vehicles (SPVs) to Maple Infrastructure Trust and its nominees. The transaction was completed on November 26, 2025, at an aggregate consideration of ₹1,814.42 cr . (CNBC)

Economy

The Union Cabinet approved a Rs 7,280 cr rare earth permanent magnet scheme to boost defence, electronics, and EV manufacturing, aiming for India to become a leading producer. Additionally, two railway multi-tracking projects and the expansion of the Pune metro, costing Rs 9,857.85 crore, received approval. (ET)

The finance ministry has urged banks to adopt a strategic approach to bolster the IBC ecosystem for enhanced value and recoveries. State-run bank CEOs are now tasked with personally monitoring top pending insolvency cases and those awaiting resolution at the NCLT, emphasizing strict adherence to timelines. (ET)

International

Nvidia, the world's most valuable company, has gone on the defensive against skeptics of its $4.5 trn valuation, down from a historic $5 trn, by waging an information campaign on Wall Street and social media. (Invst)

Intel denied allegations by Taiwanese chipmaker TSMC that one of the U.S. firm's executives, Wei-Jen Lo, had leaked trade secrets. Intel maintains rigorous policies and controls that strictly prohibit the use or transfer of any third-party confidential information or intellectual property. (Invst)

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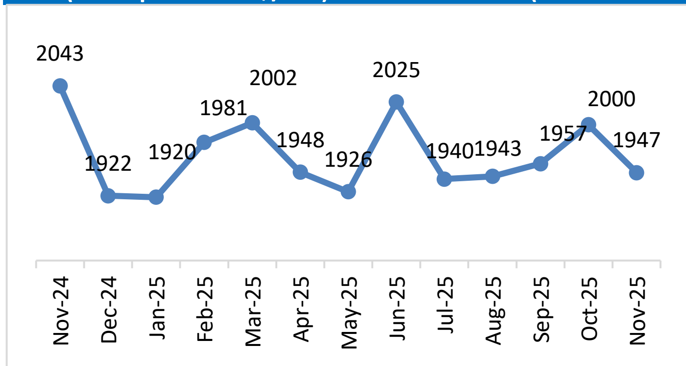
Top 5 Nifty Gainers	26-Nov	25-Nov	Var(%)
JSWSTEEL	1154	1112	3.8%
HDFCLIFE	788	767	2.7%
BAJAJFINSV	2085	2030	2.7%
BAJFINANCE	1011	986	2.5%
JIOFIN	308	301	2.4%
Top 5 Nifty Losers	**26-Nov**	**25-Nov**	**Var(%)**
BHARTIARTL	2127	2162	-1.6%
ADANIENT	2315	2333	-0.8%
EICHERMOT	7199	7219	-0.3%
SBILIFE	2029	2031	-0.1%
ASIANPAINT	2874	2876	-0.1%

Lead (LME Spot Price - $/ton) (Source: NBRR)



BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	85610	1.2%	0.5%	1.0%	6.7%
MIDCAP	47236	1.3%	-0.2%	0.7%	2.8%
SMLCAP	52323	1.2%	-0.9%	-2.7%	-4.1%
AUTO	61607	1.1%	0.8%	1.4%	15.9%
BANKEX	66791	1.2%	0.5%	2.0%	12.1%
Capital Goods	69691	1.6%	-1.0%	0.4%	-0.9%
FMCG	20363	0.7%	-0.1%	-1.7%	-4.0%
Health Care	44794	1.1%	0.3%	-0.1%	4.2%
IT	36262	1.5%	0.4%	2.6%	-16.9%
METAL	34064	2.1%	-1.0%	-1.7%	11.8%
Oil & Gas	28723	1.8%	0.0%	2.6%	8.2%
Power	6666	1.6%	-0.8%	-2.6%	-10.6%
Realty	7082	1.1%	-1.3%	-4.5%	-11.5%

10 year G-Sec Yield	Current	Previous	Change
US	3.99%	3.99%	0 bps
Japan	1.79%	1.81%	(2) bps
India	6.45%	6.46%	(1) bps
UK	4.42%	4.49%	(7) bps
Libor 3 Mths	4.85%	4.85%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US$ in bn)	602	693	-13.1%
Inflation - WPI	0.13%	0.52%	(39) bps
Inflation - CPI	0.25%	1.44%	(119) bps

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

Margin Trading Disclosure (Rs. In Cr)	Last	1 day	1 wk	1 mth	3 mth
Op. Scripwise Outstanding	112792	0%	1%	4%	21%
Fresh Exposure	2462	-9%	-33%	-33%	-60%
Exposure liquidated	2447	-21%	-2%	-44%	-54%
Closing Net scripwise outstanding	112807	0%	0%	4%	20%

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)	1280	1083	197.1

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

NSE USD Futures	26-Nov	25-Nov	Var (%)
Nov Expiry (Rs./$)	89.26	89.21	0.1%
Dec Expiry (Rs./$)	89.50	89.50	0.0%
Total Turnover (Rs. Crore)	7667	9082	-16%

Sectors	TTM PE
Auto	32.02
Auto Ancillary	41.57
Banking	14.88
Engineering	37.72
Cement	64.03
Diamonds & Jewellery	45.39
Housing Finance	24.04
Infrastructure & Const	27.28
Metals-Aluminium	32.63
Metal – Steel	17.71
Oil Expl.	8.2
Pharma	11.33
Power – Gen. Supp.	39.56
Information Tech.	29.93
Sugar	17.38
Telecom Serv. Prov.	40.21
Tyres	33.88

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	17.42	8260063	17.28	10433216	0.81%	1	1555.13	1557.90	-0.2%
Wipro	2.69	9815961	2.70	5990825	-0.37%	1	240.14	250.19	-4.0%
Dr.Reddy's	13.99	1017698	13.88	1497104	0.79%	1	1248.92	1248.00	0.1%
ICICI Bank	31.01	3759285	30.62	4401218	1.27%	2	1384.17	1375.00	0.7%
HDFC Bank	36.63	2228081	36.18	2708274	1.24%	3	1090.02	1003.90	8.6%

GDR's (US$)				
	Prices	Prev. Close	Change	Var %
L&T	45.70	45.10	0.6	1.3%
RIL	70.00	68.90	1.1	1.6%
SBI	110.40	110.40	0.0	0.0%

US Economy Data	Current	Previous
Inflation (%)(YoY)	3.00%	2.90%
Unemployment (%)	4.40%	4.30%

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 (%)	0.20%	-0.30%

Economic Calendar	Date
Indian GDP Data	28 Nov
Indian Inflation Data CPI	12 Dec
Indian Inflation Data WPI	15 Dec
Indian Monetary Policy	05 Dec
India's Industrial Production (IIP)	28 Nov
US Inflation Data	10 Dec
US GDP	23 Dec
US Unemployment Data	16 Dec
US Fed Rate	10 Dec
China GDP	To be Announced
China Inflation Data	10 Dec

Event Update		
Name	Date	Purpose
AK Capital Services Ltd.	27/11/25	Rs.16.00 per share(160%)Interim Dividend
Sikko Industries Ltd.	27/11/25	Split/Subdivision
Ecofinity Atomix Ltd.	28/11/25	Rs.0.50 per share(5%)Interim Dividend
Meera Industries Ltd.	28/11/25	Rs.0.50 per share(5%)Interim Dividend
Nile Ltd.	28/11/25	Rs.5.00 per share(50%)Interim Dividend
Thyrocare Technologies Ltd.	28/11/25	Bonus issue
Unison Metals Ltd.	28/11/25	Stock Split from Rs.10/- to Re.1/-
Mini Diamonds (India) Ltd.	02/12/25	Stock Split from Rs.10/- to Rs.2/-
Engineers India Ltd.	04/12/25	Interim Dividend
Apis India Ltd.	05/12/25	Bonus issue
Computer Age Management Services Ltd.	05/12/25	Stock Split from Rs.10/- to Rs.2/-
Mrs. Bectors Food Specialities Ltd.	12/12/25	Stock Split from Rs.10/-to Rs.2/-

Bulk Deal As On 26/11/25

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
531991	AMRAAGRI	RANJEETKUMARVERMA	S	1074489	0.68
526935	ARUNIS	NEO APEX VENTURE LLP	B	258207	137.75
533138	ASTEC	HRTI PRIVATE LIMITED	S	160786	910.71
533138	ASTEC	HRTI PRIVATE LIMITED	B	152114	904.47
544409	ASTONEALAB	NU HEIGHTS AGENCY PRIVATE LIMITED	B	90000	149.59
544409	ASTONEALAB	PADMAWATI REALCON PRIVATE LIMITED	B	70000	150.41
512149	AVANCE	NEO APEX VENTURE LLP	B	18550000	1
539288	AVI	PACE STOCK BROKING SERVICES PVT LTD	B	24482	29.89
544614	CAPILLARY	QE SECURITIES LLP	S	471084	740.72
544614	CAPILLARY	QE SECURITIES LLP	B	398138	745.85
540829	CHANDRIMA	PRAS INVESTMENT PRIVATE LIMITED	S	2420000	13.4
531909	CROISSANCE	HEMANT BAHRI	S	1200000	3.79
531909	CROISSANCE	NIRAJ RAJNIKANT SHAH	B	1175969	3.79
539405	DITCO	DEVIBEN LAXMAN PATEL	S	21002	15.1
543500	EVOQ	NIRAJ RAJNIKANT SHAH	S	144000	3.11
544616	GALLARD	AARTH.AIF GROWTH FUND	B	100000	223.1
544616	GALLARD	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	B	181000	228.19
544616	GALLARD	VORA FINANCIAL SERVICES PVT LTD	B	110000	227.15
538542	GOLDCOINHF	DHARABEN KAUSHIKKUMAR GOHIL	S	20000	15.92
531913	GOPAIST	DIVYA KANDA	S	29742	12.27
531913	GOPAIST	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	95000	12.27
531968	IITLPROJ	CHHAVI GARG	B	40517	58.3
543613	MAFIA	DINESH ISHVARBHAI LALWANI	B	24000	11.84
543613	MAFIA	MAHENDRA SINGH	S	64000	11.6
532637	MANGALAM	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	S	13913	34.54
532637	MANGALAM	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	B	133917	32.82
532637	MANGALAM	TATA CAPITAL LIMITED	S	105000	33.36
538891	MCLOUD	IRAGE BROKING SERVICES LLP	S	3192102	43.79
538891	MCLOUD	IRAGE BROKING SERVICES LLP	B	4322659	40.04
540730	MEHAI	F3 ADVISORS PRIVATE LIMITED	S	6000000	2.08
514330	ONEGLOBAL	VORA FINANCIAL SERVICES PVT LTD	B	51270	600.45
531512	ORIENTTR	PARAG MULTI TRADE LLP	S	116000	20.16
530095	PRADHIN	MOOLCHAND KIRAN KUMAR JAIN	S	15000000	0.25
530095	PRADHIN	SHARE INDIA SECURITIES LIMITED	S	5422513	0.25
530095	PRADHIN	SHARE INDIA SECURITIES LIMITED	B	8022513	0.25
511557	PROFINC	TATAD NAYAN GAUTAMBHAI	S	4906923	12.15
511557	PROFINC	TATAD NAYAN GAUTAMBHAI	B	4490743	12.13
542145	RONI	RAJESHWAR DILIP SURYAVANSHI	S	198000	55.47
544428	SEVL	DINESH KUMAR MOTWANI	S	25200	51.1
544428	SEVL	DINESH KUMAR MOTWANI	B	168000	50.76
544428	SEVL	RAJESH NANDY	S	63600	52.66
543924	SONALIS	SATYAVIBHUMUPPANA	B	30000	83.84
544267	SUBAM	SINCERE SYNDICATION AND CORPORATE SERVICES LLP	B	119200	209.72
539117	SUJALA	MAHEVARSH FINCON PRIVATE LIMITED	B	30000	74.01
539117	SUJALA	SUNAYANA INVESTMENT COMPANY LIMITED	S	35560	74.21
539117	SUJALA	SUNAYANA INVESTMENT COMPANY LIMITED	B	19494	77.32
543745	SVS	ALTIZEN VENTURES LLP	S	696000	12.1
543745	SVS	ANIL RAMANAND AGARWAL	B	162000	12.1
543745	SVS	MUNNI DEVI	B	438000	12.1
531039	SWADHATURE	LAXMANBHAI RAVJIBHAI GAJERA	S	20970	7.73
543399	TARSONS	SIDDHARTHA SACHETI	S	385934	233.37
532159	TRESCON	DIVYA DEVEN PATHAK	S	700264	8.2
531411	TUNITEX	NIRAJ RAJNIKANT SHAH	B	1065698	1.4

500426	UTLINDS	BIRESWAR BHATTACHARYYA	B	180000	3.36
544433	VALINDIA	PRAGNESH JINDAS DOSHI	B	129600	22
511018	ZMILGFIN	NAVRATRI SHARE TRADING PRIVATE LIMITED .	B	210000	78.99
511018	ZMILGFIN	PUNEET AGGARWAL	S	200000	79

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ADANI-RE	Adani Enterprises Limited	GREEN ENTERPRISES INVESTMENT HOLDING RSC LIMITED	SELL	842924	508.61
BHARTIARTL	Bharti Airtel Limited	INDIAN CONTINENT INVESTMENT LIMITED	SELL	34300000	2097.81
BIKEWO	Bikewo Green Tech Limited	MANVI TALWAR	SELL	80000	19.66
CAPTRUST	Capital Trust Limited	AKANKSHA SHARMA	BUY	211111	13.7
DELTIC	Delta Autocorp Limited	GIRIRAJ STOCK BROKING PRIVATE LIMITED	BUY	79000	46.9
INTENTECH	Intense Technologies Ltd	CHIDELLA KRISHNA SHASTRI	SELL	200000	130
INTENTECH	Intense Technologies Ltd	JAYANT DWARKANATH	SELL	142827	130
INTENTECH	Intense Technologies Ltd	RADIANT GLOBAL FUND - CLASS B PARTICIPATING SHARES	BUY	620000	130
INTENTECH	Intense Technologies Ltd	TIKAM SUJAN	SELL	250000	130
MCLOUD	Magellanic Cloud Limited	AMEERUDDIN SYED	SELL	3203170	42.78
MCLOUD	Magellanic Cloud Limited	JOSEPH SUDHEER REDDY THUMMA	SELL	11950000	39.54
MANGALAM	Mangalam Drugs And Orgar	GAURAV CHANDRAKANT SHAH	BUY	175000	34.17
MANGALAM	Mangalam Drugs And Orgar	LIMITED BADJATE STOCK BROKING PRIVATE	SELL	400000	32.86
MANGALAM	Mangalam Drugs And Orgar	TATA CAPITAL LIMITED	SELL	444316	33.54
PATELRMART	Patel Retail Limited	TRADE STATION VENTURES	BUY	200000	258.34
RAIN	Rain Industries Limited	FIRST WATER FUND	BUY	1948757	109
RAIN	Rain Industries Limited	FIRST WATER FUND	BUY	1948757	109
RAIN	Rain Industries Limited	HARESH TIKAMDAS KASWANI	SELL	948757	109
RAIN	Rain Industries Limited	K2 FAMILY PRIVATE TRUST	SELL	1000000	109
TARSONS	Tarsons Products Limited	SIDDHARTHA SACHETI	SELL	455577	229.24
TAURIAN	Taurian MPS Limited	LAROIA MONA	SELL	107200	239.67
TAURIAN	Taurian MPS Limited	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	BUY	100000	240.06

Disclosure:

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Nirmal Bang Research (Division of Nirmal Bang Securities Pvt. Ltd.)
B-2, 301/302, Marathon Innova,
Opp.Peninsula Corporate Park
Off. Ganpatrao Kadam Marg
Lower Parel(W), Mumbai-400013
Board No. : 91 22 6723 8000/8001
Fax. : 022 6723 8010