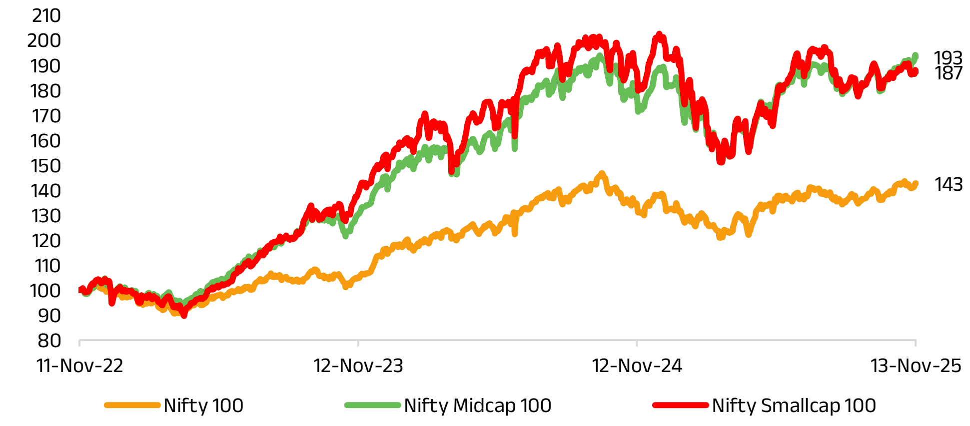
Daily Equity Market Pulse - November 14, 2025

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	13-Nov-25	1 Day	1 Week	1 Month
Nifty 50	25,879.15	0.01%	1.45%	2.58%
Nifty 100	26,505.60	0.02%	1.34%	2.47%
Nifty 200	14,460.55	-0.05%	1.47%	2.61%
Nifty 500	23,816.00	-0.09%	1.29%	2.24%
Nifty Large Midcap 250	16,814.30	-0.15%	1.58%	2.56%
Nifty Midcap 150	22,322.45	-0.32%	1.82%	2.65%
Nifty Next 50	69,851.65	0.06%	0.80%	1.87%
Nifty Smallcap 250	17,051.05	-0.40%	-0.06%	-0.07%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Smart Beta Index

Index	13-Nov-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,788.20	0.01%	1.84%	1.84%
NIFTY 500 Value 50	15,255.40	-0.11%	2.04%	4.35%
Nifty 200 Quality 30	21,346.20	-0.13%	2.42%	2.82%
Nifty 50 Equal Weight	33,010.70	-0.08%	1.52%	2.22%
NIFTY Alpha Low Volatility 30	26,933.25	0.01%	1.05%	1.28%
Nifty High Beta 50	3,983.00	-0.18%	2.67%	3.36%
Nifty Low Volatility 50	25,563.75	0.10%	1.24%	1.94%
Nifty Midcap150 Momentum 50	62,924.35	-0.47%	1.81%	2.27%
Nifty PSE	9,957.25	-0.38%	1.45%	0.91%
Nifty SME Emerge	15,596.20	0.25%	1.60%	1.20%
Nifty 100 ESG	5,129.80	-0.13%	1.89%	2.57%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Sector Indices

Index	13-Nov-25	1 Day	1 Week	1 Month
Nifty Auto	27,382.80	-0.37%	2.84%	2.56%
Nifty Bank	58,381.95	0.18%	1.44%	3.10%
Nifty Consumption	12,357.15	-0.26%	0.25%	0.75%
Nifty Financial	27,396.15	0.22%	1.34%	1.90%
Nifty FMCG	55,243.50	-0.51%	-0.84%	1.41%
Nifty Healthcare	14,809.35	0.18%	0.79%	0.42%
Nifty IT	36,679.45	-0.48%	3.80%	3.82%
Nifty Media	1,479.20	-0.55%	-0.96%	-5.38%
Nifty Metal	10,588.60	0.44%	2.98%	3.63%
Nifty MNC	30,302.55	0.06%	0.66%	1.76%
Nifty Pharma	22,686.80	0.41%	1.96%	2.17%
Nifty Realty	941.90	0.42%	-0.50%	5.03%
Nifty Energy	36,187.85	-0.28%	0.97%	2.55%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Nifty 50 Top 5 Gainers

Company	13-Nov-25	Prev_Day	% Change	1 Week
Asian Paints	2,879.40	2,769.80	3.96	10.62
Hindalco	811.95	794.40	2.21	2.99
ICICI Bank	1,385.90	1,358.90	1.99	4.96
L&T Ltd.	4,002.50	3,954.60	1.21	3.11
Divi's Lab	6,593.50	6,520.00	1.13	-4.21

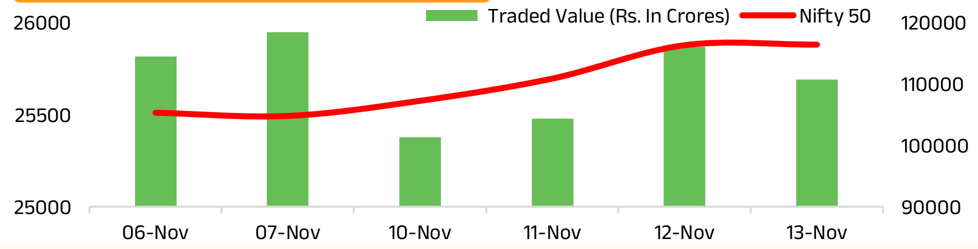
Source: NSE

Nifty 50 Top 5 Losers

Company	13-Nov-25	Prev_Day	% Change	1 Week
M&M	3,699.50	3754	-1.46	2.24
ONGC	250.85	254	-1.18	-0.26
Tata Motors	397.95	402	-1.04	-2.43
Coal India	383.20	387	-0.85	2.69
TCS	3,105.70	3132	-0.83	3.15

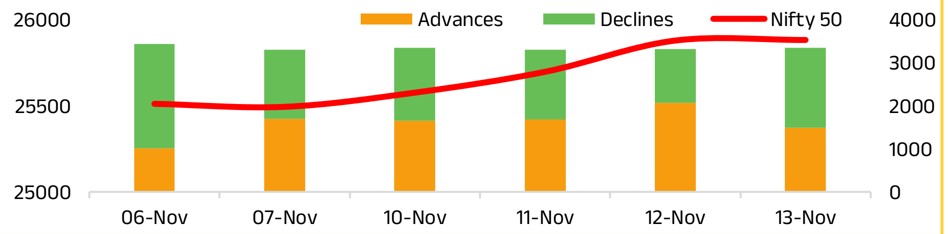
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

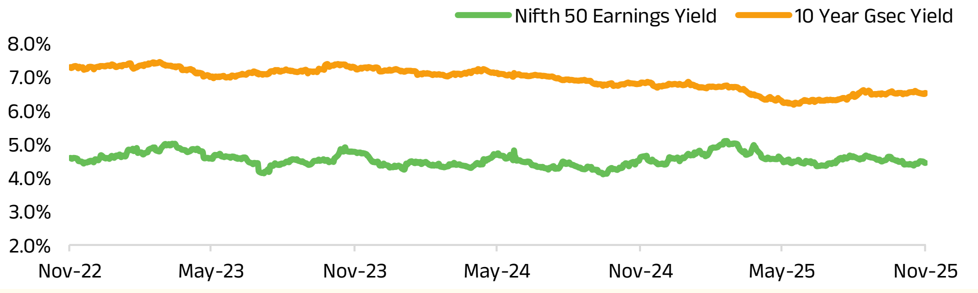
Indian equity markets closed flat as investors remained cautious ahead of the Bihar Election 2025 outcome. Early gains, supported by easing trade tensions and the passage of a funding bill that ended the longest United States government shutdown, were wiped out due to profit booking at higher levels as market sentiment remained subdued awaiting clarity on the political landscape that could emerge from the Bihar verdict.

Eicher Motors on reported a consolidated net profit after tax (PAT) of Rs. 1,369 crore for the second quarter of the financial year 2025–26 (Q2FY26), marking a 25% YoY increase, driven by strong festive season sales. The company had posted a profit of Rs. 1,100 crore in the same quarter last year.

Canada-based Manulife and Mahindra & Mahindra (M&M), one of India's largest automobile manufacturers with interests in financial services, have entered into an agreement to form a 50:50 life insurance joint venture. This marks Manulife's first entry into the Indian insurance market.

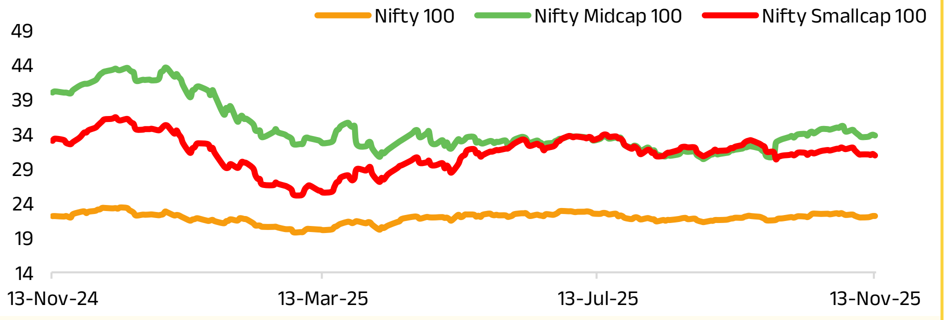
Tata Steel reported a 272% YoY surge in consolidated net profit attributable to owners, at Rs. 3,101.75 crore for the second quarter of FY2025–26 (Q2FY26), driven by higher sales volumes in India and planned cost reductions. In the same quarter last year, the steel major had posted a net profit of Rs. 833.45 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



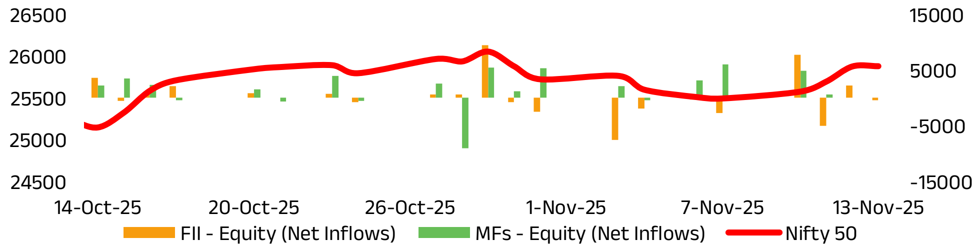
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FIIs & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.

Description	Net	MTD	QTD	YTD
FII	-461.98	-8,145	6,465	-148,054
MF**	653.86	16,338	39,946	435,009
DII	3091.87	32,891	86,292	655,878

Source: SEBI, NSDL;**As on 11th Nov 2025;

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F&O Trends

	Latest	Previous	Change %
Near Futures	25953.80	25986.10	-0.12%
Near Basis	74.65	110.30	-32.32%
Mid Futures	26134.90	26164.00	-0.11%
Mid Basis	255.75	288.20	-11.26%
Near Open Interest (Cr.)	1.76	1.78	-0.99%
Mid Open Interest (Cr.)	0.17	0.16	6.89%
Rollover (%)	9.77	9.14	6.87%
Put Call Ratio (OI)	1.10	1.23	-10.47%
Put Call Ratio(Vol)	0.90	0.96	-5.70%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2500	2970	42014
Index Options	1214752	1218028	439421
Stock Futures	24907	21072	406288
Stock Options	37624	38539	33219
Total	1279783	1280608	920942

Source: NSE

Global Equity Market

Global Indices	13-Nov-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3673.80	-1.70%	0.26%	1.00%
Nasdaq 100 (U.S.)	24993.46	-2.05%	-0.54%	0.98%
FTSE (U.K.)	9807.68	-1.05%	0.74%	3.86%
DAX Index (Germany)	24041.62	-1.39%	1.30%	-1.42%
CAC 40 Index (France)	8232.49	-0.11%	3.36%	3.76%
SSE Composite (China)	4029.50	0.73%	0.54%	3.60%
Nikkei (Japan)	51281.83	0.43%	0.78%	6.64%
Kospi (South Korea)	4170.63	0.49%	3.58%	16.35%
HangSeng (Hong Kong)	27073.03	0.56%	2.22%	4.57%
Strait Times (Singapore)	4575.91	0.15%	2.03%	4.24%
Ibovespa Sao Paulo (Brazil)	157162.43	-0.30%	2.49%	10.85%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8753.40	-0.52%	-0.85%	-1.46%
Jakarta Composite (Indonesia)	8372.00	-0.20%	0.42%	1.76%
KLSE (Malaysia)	1632.27	0.04%	0.82%	1.06%

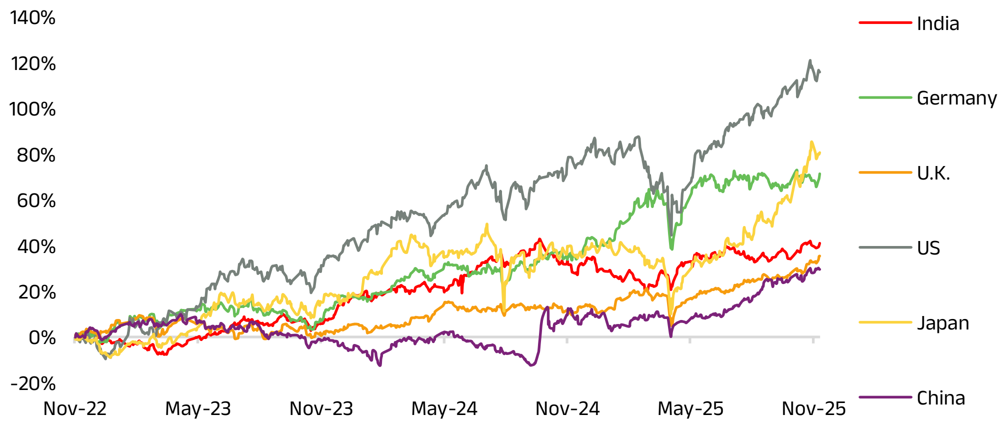
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	13-Nov-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	126,587	2.60%	5.33%	2.60%
Gold ($/oz)	4,171.10	-0.65%	4.86%	1.48%
Silver (INR/1 kg)	163,720	4.67%	10.80%	-4.20%
Silver ($/oz)	52.32	-2.03%	9.03%	-0.03%
Brent Crude($/bbl)	62.56	1.26%	-1.76%	-5.15%
Crude Oil (INR/1 bbl)	5,184.00	-4.25%	-1.87%	-0.77%
NYMEX Crude($/bbl)	59.44	0.41%	-1.16%	-0.35%
Natural Gas (INR/1 mmbtu)	401.80	-0.77%	7.12%	45.84%
Aluminium (INR/1 kg)	273.85	0.20%	0.15%	3.69%
Copper (INR/1 kg)	1,016.00	0.88%	1.35%	2.63%
Nickel (INR/1 kg)	1,337.70	-0.10%	0.16%	-1.28%
Lead (INR/1 kg)	185.75	-0.54%	0.27%	-1.38%
Zinc (INR/1 kg)	316.20	1.05%	1.70%	6.91%
Mentha Oil (INR/1 kg)	1,004.90	0.14%	-1.00%	-0.34%
Baltic Dry Index	2,077	2.32%	0.68%	-3.13%

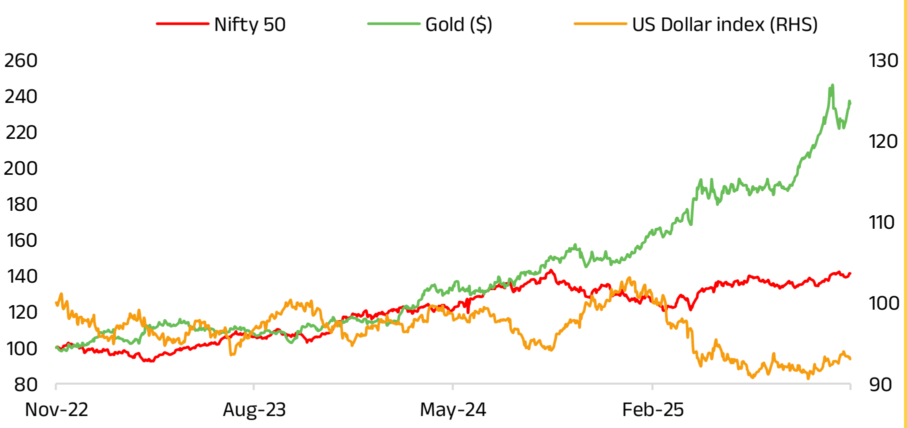
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Comparative Performance of Major Global Equity Market



Source: Refinitiv

Nifty 50 vs Gold ($) vs US Dollar Index- Rebase to 100



Source: NSE, Refinitiv

Term of the Day

Corporate Actions

Definition: Corporate actions are decisions taken by a company that affect its securities and shareholders, such as stock splits, bonus issues, rights issues, and mergers.

Explanation

These actions can change the number of shares, ownership structure, or value of holdings. For example, a stock split increases the number of shares while reducing the price proportionally, making shares more affordable without changing total value. A bonus issue gives free shares to existing shareholders, while a rights issue allows them to buy additional shares at a discount. Corporate actions are important because they impact liquidity, valuation, and investor strategy. For instance, if Company X announces a 2-for-1 split, a shareholder with 100 shares will now hold 200 shares, but the overall investment value remains the same.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.12	5.92	8.56	14.44
Flexi Cap Fund	1.36	6.97	6.90	16.16
Mid Cap Fund	1.46	9.33	8.14	21.38
Large & Mid Cap Fund	1.68	7.88	8.57	18.31
Small Cap Fund	1.10	8.66	3.60	20.06
Multi Cap Fund	1.52	7.76	7.27	18.84
Focused Fund	1.53	6.71	7.37	15.66
Value Fund	2.42	7.09	6.46	18.86
Contra Fund	1.72	6.93	6.75	19.97
ELSS	1.53	6.97	6.91	16.92
Equity Savings	0.93	4.28	7.44	9.94
Arbitrage Fund	0.52	2.82	6.22	6.88
Dividend Yield Fund	1.97	6.52	5.45	19.17
Aggressive Hybrid Fund	1.23	5.61	7.84	14.28
Balanced Advantage	1.35	4.71	6.84	11.82

Source: MFI 360 Explorer; Less than 1 year returns are absolute and greater than 1 year returns are CAGR. Category wise parent schemes are selected, which are available for investment to calculate average returns.