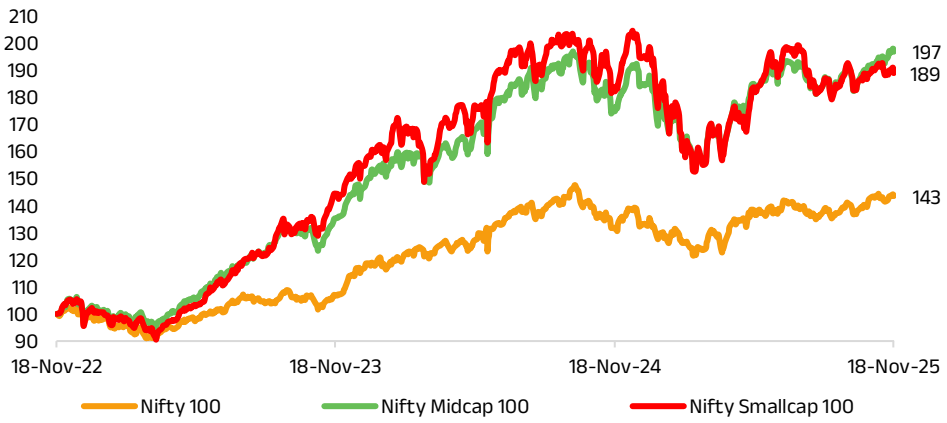


Broad Indices Historical Movement



Source: NSE

Broad Indices

	18-Nov-25	1 Day	1 Week	1 Month
Nifty 50	25,910.05	-0.40%	0.84%	0.78%
Nifty 100	26,519.00	-0.45%	0.68%	0.72%
Nifty 200	14,472.15	-0.48%	0.67%	1.17%
Nifty 500	23,824.65	-0.54%	0.60%	0.96%
Nifty Large Midcap 250	16,826.20	-0.54%	0.61%	1.64%
Nifty Midcap 150	22,342.65	-0.62%	0.53%	2.57%
Nifty Next 50	69,643.50	-0.73%	-0.12%	0.41%
Nifty Smallcap 250	17,022.75	-1.02%	0.17%	-0.32%

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

Smart Beta Index

Index	18-Nov-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,824.45	-0.65%	0.94%	0.06%
NIFTY 500 Value 50	15,191.55	-0.65%	0.35%	4.38%
Nifty 200 Quality 30	21,285.25	-0.63%	0.36%	0.85%
Nifty 50 Equal Weight	32,976.10	-0.60%	0.77%	0.46%
NIFTY Alpha Low Volatility 30	26,851.70	-0.53%	0.53%	-0.83%
Nifty High Beta 50	3,989.45	-0.90%	0.54%	3.28%
Nifty Low Volatility 50	25,535.05	-0.52%	0.62%	-0.18%
Nifty Midcap150 Momentum 50	63,231.70	-0.69%	0.84%	2.36%
Nifty PSE	9,994.80	-0.49%	0.06%	1.01%
Nifty SME Emerge	15,502.45	-0.38%	0.25%	1.57%
Nifty 100 ESG	5,129.50	-0.53%	1.03%	1.21%

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

Sector Indices

Index	18-Nov-25	1 Day	1 Week	1 Month
Nifty Auto	27,368.25	-0.38%	0.81%	0.51%
Nifty Bank	58,899.25	-0.11%	1.31%	2.05%
Nifty Consumption	12,431.25	-0.38%	0.90%	-1.50%
Nifty Financial	27,546.75	-0.36%	0.98%	0.03%
Nifty FMCG	55,363.45	-0.56%	-0.29%	-2.21%
Nifty Healthcare	14,824.85	-0.72%	1.11%	-0.28%
Nifty IT	35,975.20	-1.10%	-0.39%	2.93%
Nifty Media	1,482.25	-0.23%	0.62%	-2.46%
Nifty Metal	10,383.70	-1.07%	-1.66%	1.81%
Nifty MNC	30,174.00	-0.58%	-0.25%	-0.10%
Nifty Pharma	22,713.65	-0.67%	1.54%	2.07%
Nifty Realty	927.30	-1.91%	-1.62%	-0.69%
Nifty Energy	36,223.75	-0.60%	0.43%	2.34%

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

Nifty 50 Top 5 Gainers

Company	18-Nov-25	Prev_Day	% Change	1 Week
Bharti Airtel	2,149.20	2,112.20	1.75	5.23
Axis Bank	1,265.40	1,249.60	1.26	3.51
Asian Paints	2,906.00	2,887.90	0.63	9.36
Maruti	15,930.00	15,878.00	0.33	1.82
Titan Industries Limited	3,879.20	3,868.60	0.27	1.75

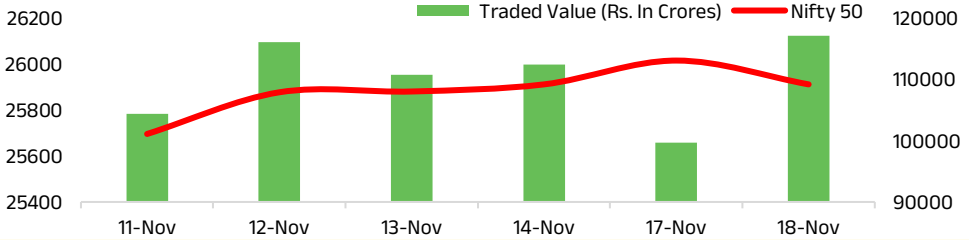
Source: NSE

Nifty 50 Top 5 Losers

Company	18-Nov-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,422.00	1453	-2.12	0.99
Tata Beverages	1,154.10	1179	-2.10	-0.18
United Phos	759.65	773	-1.75	0.97
Infosys	1,486.40	1508	-1.41	-2.87
Cipla	1,514.50	1536	-1.37	-0.03

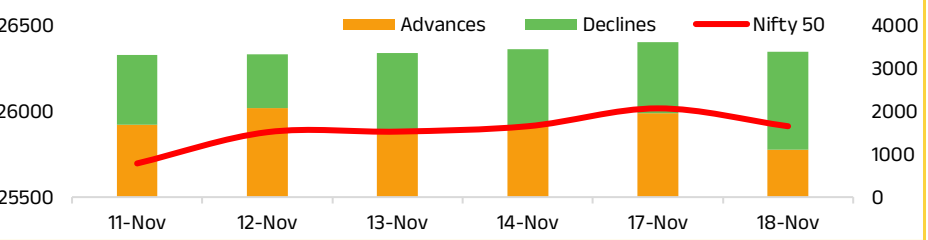
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

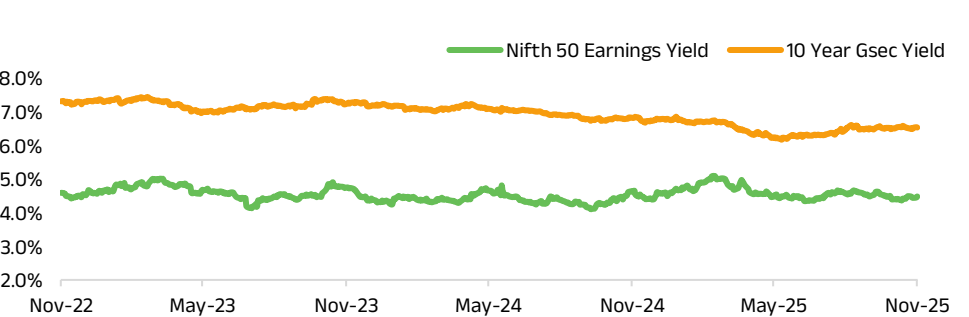
Indian equity markets snapped their six-day winning streak as investors booked profits following the recent rally, amid weak global cues. Market participants remained cautious, closely monitoring key U.S. economic data for indications on the Federal Reserve's interest rate trajectory.

AstraZeneca Pharma India and Sun Pharmaceutical Industries on announced an exclusive brand partnership to expand the availability of Sodium Zirconium Cyclosilicate (SZC), a treatment for hyperkalemia, in the Indian market.

Microsoft is offering college students a one-year Microsoft 365 Personal subscription at no cost. Eligible users will gain access to the full suite of productivity tools, including Copilot AI integration in Word, Excel, PowerPoint, and Teams.

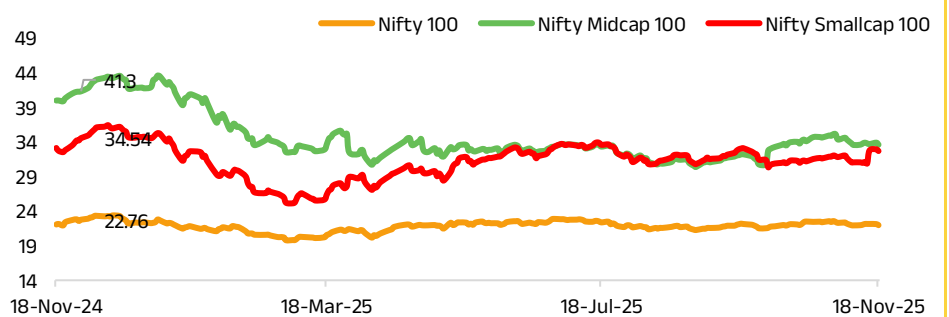
Amazon is planning to raise about \$12 billion through a corporate bond sale—its first U.S. dollar offering in nearly three years—as major technology companies ramp up spending to support rapidly growing artificial intelligence (AI) needs.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



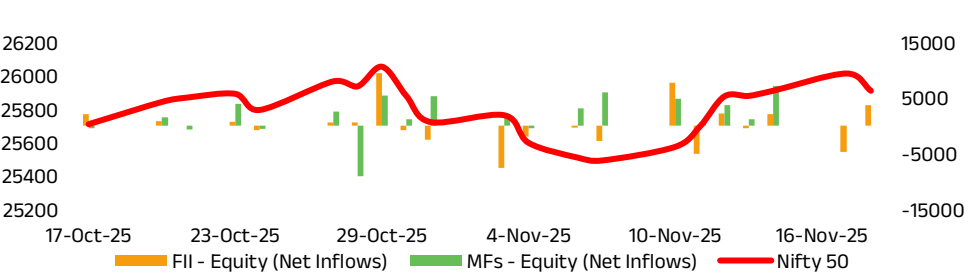
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	YTD
FII	3667	-7,086	7,524	-1,46,995
MF**	7189.98	28,469	52,077	4,47,140
DII	6156.83	48,975	1,02,376	6,71,962

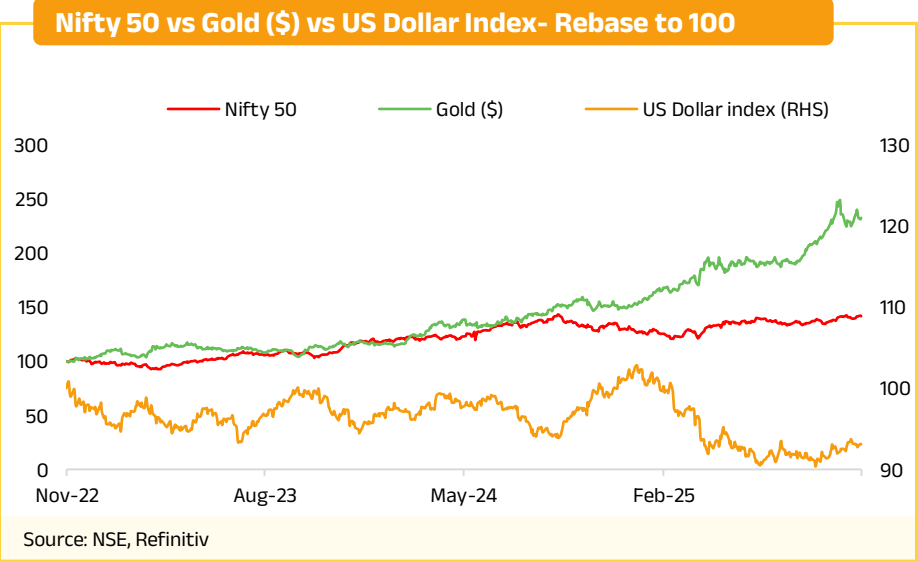
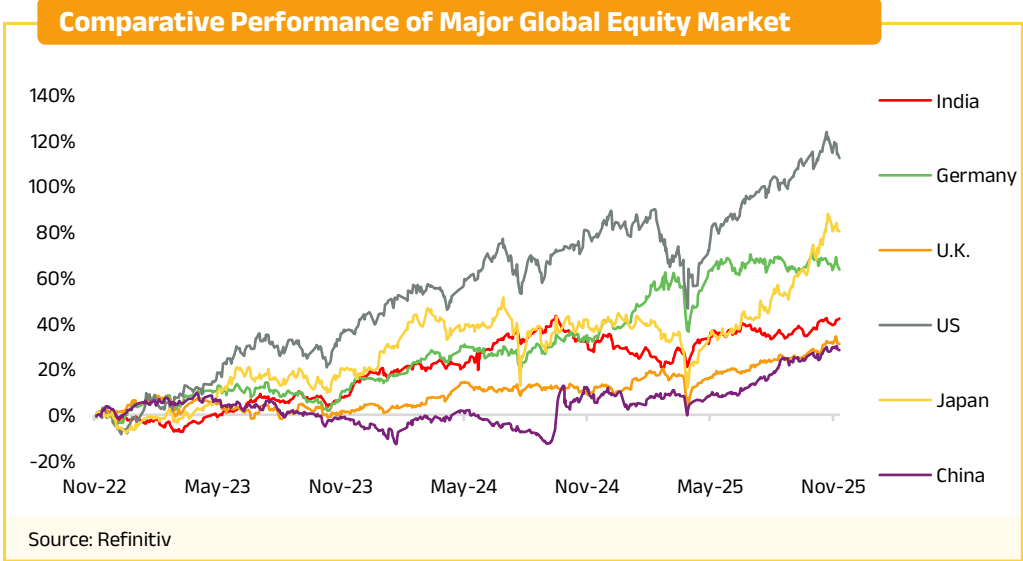
Source: SEBI, NSDL;**As on 14th Nov 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25948.80	26060.10	-0.43%
Near Basis	38.75	46.65	-16.93%
Mid Futures	26134.30	26240.00	-0.40%
Mid Basis	224.25	226.55	-1.02%
Near Open Interest (Cr.)	1.76	1.81	-2.49%
Mid Open Interest (Cr.)	0.23	0.21	11.46%
Rollover (%)	12.90	11.44	12.78%
Put Call Ratio (OI)	0.94	1.13	-16.82%
Put Call Ratio(Vol)	0.99	0.98	1.36%
Source: NSE			

FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2674	2580	44049
Index Options	1627381	1633278	497392
Stock Futures	17596	18521	406857
Stock Options	32438	32571	37786
Total	1680090	1686951	986084
Source: NSE			

Global Equity Market				
Global Indices	18-Nov-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3607.64	-0.75%	-3.40%	-0.92%
Nasdaq 100 (U.S.)	24503.10	-1.20%	-4.04%	-1.27%
FTSE (U.K.)	9552.30	-1.27%	-3.51%	2.11%
DAX Index (Germany)	23173.05	-1.77%	-3.80%	-2.76%
CAC 40 Index (France)	7967.93	-1.86%	-2.31%	-2.52%
SSE Composite (China)	3939.81	-0.81%	-1.57%	2.61%
Nikkei (Japan)	48702.98	-3.22%	-4.21%	2.36%
Kospi (South Korea)	3953.62	-3.32%	-3.72%	5.46%
HangSeng (Hong Kong)	25930.03	-1.72%	-2.87%	2.70%
Strait Times (Singapore)	4504.67	-0.86%	-0.83%	4.06%
Ibovespa Sao Paulo (Brazil)	156522.13	-0.30%	-0.78%	9.15%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8469.10	-1.94%	-3.97%	-5.85%
Jakarta Composite (Indonesia)	8361.93	-0.65%	-0.05%	5.64%
KLSE (Malaysia)	1614.06	-0.82%	-1.27%	0.43%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	18-Nov-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,21,519	-1.13%	-1.70%	-6.40%
Gold (\$/oz)	4,067.60	0.58%	-1.43%	-4.26%
Silver (INR/1 kg)	1,53,466	-1.25%	-0.42%	-10.09%
Silver (\$/oz)	50.69	0.97%	-1.06%	-2.24%
Brent Crude(\$/bbl)	63.34	-0.57%	-1.72%	2.29%
Crude Oil (INR/1 bbl)	5,310.00	-0.43%	-0.41%	5.13%
NYMEX Crude(\$/bbl)	61.41	1.40%	0.94%	5.52%
Natural Gas (INR/1 mmbtu)	386.50	-4.62%	0.47%	49.63%
Aluminium (INR/1 kg)	265.15	-2.05%	-3.28%	0.88%
Copper (INR/1 kg)	997.10	-0.79%	-1.13%	1.09%
Nickel (INR/1 kg)	1,299.20	-2.75%	-2.90%	-3.32%
Lead (INR/1 kg)	186.60	0.16%	1.50%	1.61%
Zinc (INR/1 kg)	310.00	-0.88%	-0.93%	5.87%
Mentha Oil (INR/1 kg)	1,012.50	0.09%	0.09%	0.79%
Baltic Dry Index	2,216	2.93%	6.95%	7.10%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				



Term of the Day



Circuit Breakers

Definition: Circuit breakers are regulatory measures implemented by stock exchanges to temporarily halt trading in securities or the entire market when prices move beyond predefined thresholds.



Explanation

In India, circuit breakers are triggered at three levels—10%, 15%, and 20%—based on the movement of benchmark indices like Nifty 50 or Sensex. These mechanisms aim to curb panic selling and maintain market stability during extreme volatility.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.56	3.95	8.71	14.63
Flexi Cap Fund	0.41	4.93	7.09	16.47
Mid Cap Fund	1.13	6.98	8.18	22.02
Large & Mid Cap Fund	0.81	5.53	8.65	18.69
Small Cap Fund	0.84	5.70	3.54	20.21
Multi Cap Fund	0.78	5.58	7.34	19.18
Focused Fund	0.40	4.40	7.38	15.92
Value Fund	1.77	4.96	6.94	19.13
Contra Fund	0.79	4.81	7.20	20.23
ELSS	0.66	4.71	7.20	17.24
Equity Savings	0.58	3.74	7.57	10.04
Arbitrage Fund	0.47	2.91	6.21	6.86
Dividend Yield Fund	0.86	4.12	6.16	19.43
Aggressive Hybrid Fund	0.31	3.90	7.87	14.41
Balanced Advantage	0.59	3.57	6.95	11.97
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.				