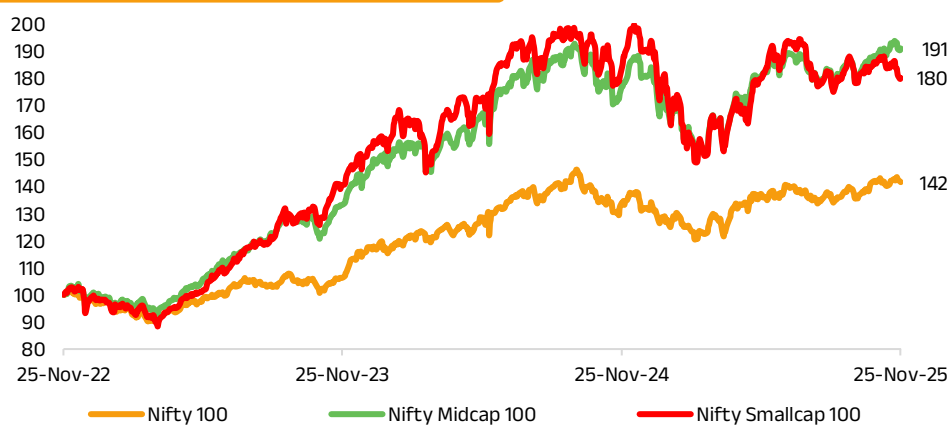


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	25-Nov-25	1 Day	1 Week	1 Month
Nifty 50	25,884.80	-0.29%	-0.10%	0.35%
Nifty 100	26,405.30	-0.20%	-0.43%	0.01%
Nifty 200	14,398.65	-0.10%	-0.51%	0.33%
Nifty 500	23,655.05	-0.08%	-0.71%	-0.13%
Nifty Large Midcap 250	16,712.20	0.03%	-0.68%	0.56%
Nifty Midcap 150	22,136.45	0.26%	-0.92%	1.12%
Nifty Next 50	68,172.45	0.26%	-2.11%	-1.71%
Nifty Smallcap 250	16,633.40	0.11%	-2.29%	-3.40%

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

## Smart Beta Index

Index	25-Nov-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,692.70	0.16%	-0.41%	0.03%
NIFTY 500 Value 50	14,851.30	0.20%	-2.24%	0.80%
Nifty 200 Quality 30	21,113.25	-0.22%	-0.81%	-0.20%
Nifty 50 Equal Weight	32,902.65	-0.14%	-0.22%	-0.11%
NIFTY Alpha Low Volatility 30	26,760.85	-0.03%	-0.34%	-1.12%
Nifty High Beta 50	3,898.75	0.43%	-2.27%	-0.10%
Nifty Low Volatility 50	25,502.70	0.00%	-0.13%	-0.21%
Nifty Midcap150 Momentum 50	62,791.30	0.16%	-0.70%	2.06%
Nifty PSE	9,709.90	-0.17%	-2.85%	-2.00%
Nifty SME Emerge	15,106.40	0.09%	-2.55%	-2.34%
Nifty 100 ESG	5,121.10	-0.13%	-0.16%	0.90%

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

## Sector Indices

Index	25-Nov-25	1 Day	1 Week	1 Month
Nifty Auto	27,378.70	-0.23%	0.04%	1.00%
Nifty Bank	58,820.30	-0.03%	-0.13%	1.94%
Nifty Consumption	12,405.00	-0.14%	-0.21%	-0.92%
Nifty Financial	27,409.40	-0.32%	-0.50%	0.05%
Nifty FMCG	55,052.10	-0.16%	-0.56%	-2.30%
Nifty Healthcare	14,799.75	0.37%	-0.17%	-0.42%
Nifty IT	36,826.90	-0.57%	2.37%	2.34%
Nifty Media	1,424.95	-0.80%	-3.87%	-7.48%
Nifty Metal	10,073.40	0.55%	-2.99%	-2.65%
Nifty MNC	29,923.70	0.03%	-0.83%	-0.82%
Nifty Pharma	22,590.95	0.44%	-0.54%	1.04%
Nifty Realty	901.35	1.62%	-2.80%	-4.20%
Nifty Energy	35,350.35	-0.22%	-2.41%	-0.78%

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

## Nifty 50 Top 5 Gainers

Company	25-Nov-25	Prev_Day	% Change	1 Week
Hindalco	789.35	774.65	1.90	-0.98
Hero Moto	6,081.50	5,982.00	1.66	4.86
SBI	983.60	970.60	1.34	1.15
United Phos	749.70	742.70	0.94	-1.31
Britannia Industries Limited	5,867.00	5,815.50	0.89	0.46

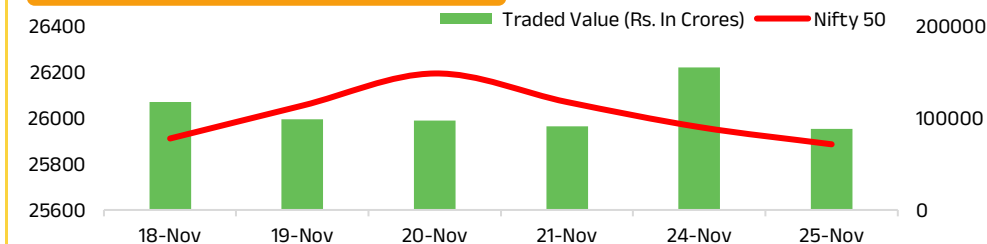
Source: NSE

## Nifty 50 Top 5 Losers

Company	25-Nov-25	Prev_Day	% Change	1 Week
Tata Motors	352.45	358	-1.63	-5.08
Infosys	1,530.60	1548	-1.12	2.97
BPCL	355.85	360	-1.06	-4.30
Indian Oil	164.12	166	-0.95	-4.35
HDFC Bank	989.80	999	-0.94	-0.27

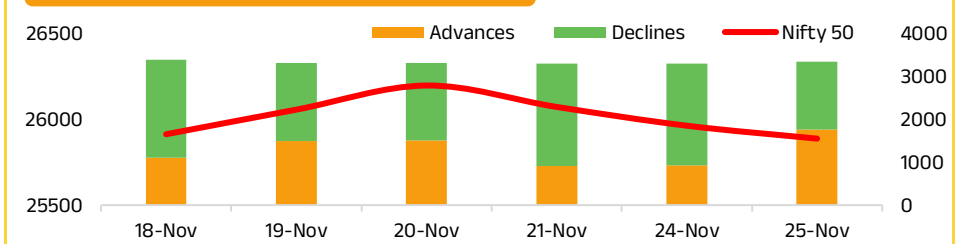
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

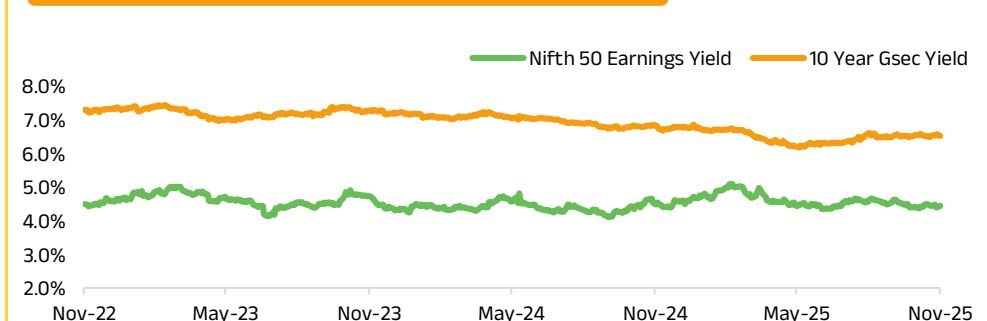
Indian equity markets remained range-bound for most of the session, but a spell of selling in the final hour dragged indices into the red amid the monthly expiry of futures & options contracts for the Nov 2025 series. Despite supportive global cues, persistent foreign investor selling weighed on sentiment, leading to a negative close.

Bajaj Auto is accelerating its e-rickshaw rollout, aiming to expand Riki's footprint to 200 cities as part of its aggressive growth strategy in the electric mobility space.

Morphle Labs secured \$5 million in Series A funding from Inflexor Ventures to scale manufacturing, pursue global regulatory approvals, and expand its cancer diagnostics automation solutions internationally.

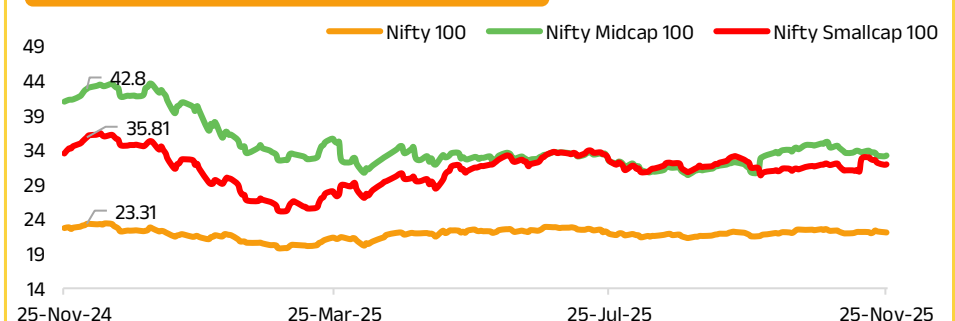
Asian Paints announced a three-year partnership with BCCI as official colour partner, strengthening brand visibility through on-ground engagement and digital activations across 110 matches.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



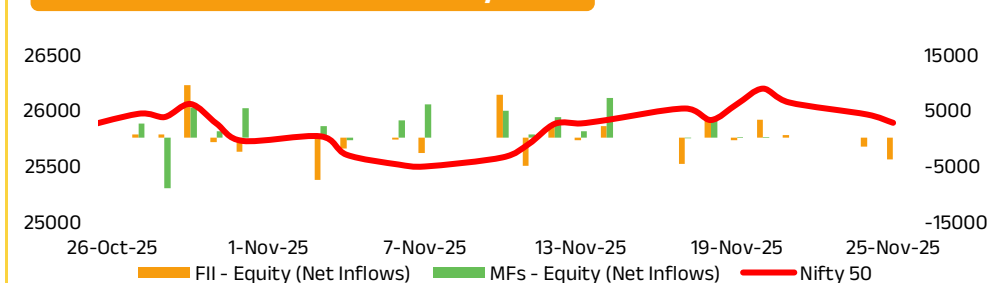
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## PE Comparison across Market cap



Source: NSE

## FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

## Institutional Flows (Equity)

Description	INR Cr.			
	Net	MTD	QTD	YTD
FII	-3850.87	-9,256	5,354	-149,165
MF**	110.08	31,909	52,628	447,690
DII	3912.47	62,747	116,148	685,734

Source: SEBI, NSDL;\*\*As on 20th Nov 2025;

### F&O Trends

	Latest	Previous	Change %
Near Futures	25886.80	25996.40	-0.42%
Near Basis	2.00	36.90	-94.58%
Mid Futures	26055.40	26170.70	-0.44%
Mid Basis	170.60	211.20	-19.22%
Near Open Interest (Cr.)	0.66	0.93	-28.73%
Mid Open Interest (Cr.)	1.37	1.10	24.22%
Rollover (%)	68.77	55.79	23.26%
Put Call Ratio (OI)	0.82	0.77	6.62%
Put Call Ratio(Vol)	0.94	1.07	-12.15%

Source: NSE

### FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	11867	10300	44845
Index Options	2088619	2097390	542721
Stock Futures	125254	119084	400271
Stock Options	38687	42420	25952
Total	2264426	2269194	1013790

Source: NSE

### Global Equity Market

Global Indices	25-Nov-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3690.89	0.99%	2.31%	-0.54%
Nasdaq 100 (U.S.)	25018.36	0.58%	2.10%	-1.34%
FTSE (U.K.)	9609.53	0.78%	0.60%	-0.37%
DAX Index (Germany)	23464.63	0.97%	1.23%	-3.20%
CAC 40 Index (France)	8025.80	0.83%	0.73%	-2.43%
SSE Composite (China)	3870.02	0.87%	-1.77%	-2.03%
Nikkei (Japan)	48659.52	0.07%	-0.09%	-1.30%
Kospi (South Korea)	3857.78	0.30%	-2.42%	-2.13%
HangSeng (Hong Kong)	25894.55	0.69%	-0.14%	-1.02%
Strait Times (Singapore)	4485.63	-0.24%	-0.42%	1.43%
Ibovespa Sao Paulo (Brazil)	155910.18	0.41%	-0.39%	6.66%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8537.00	0.14%	0.80%	-5.34%
Jakarta Composite (Indonesia)	8521.89	-0.56%	1.91%	3.02%
KLSE (Malaysia)	1611.74	-0.43%	-0.14%	-0.09%

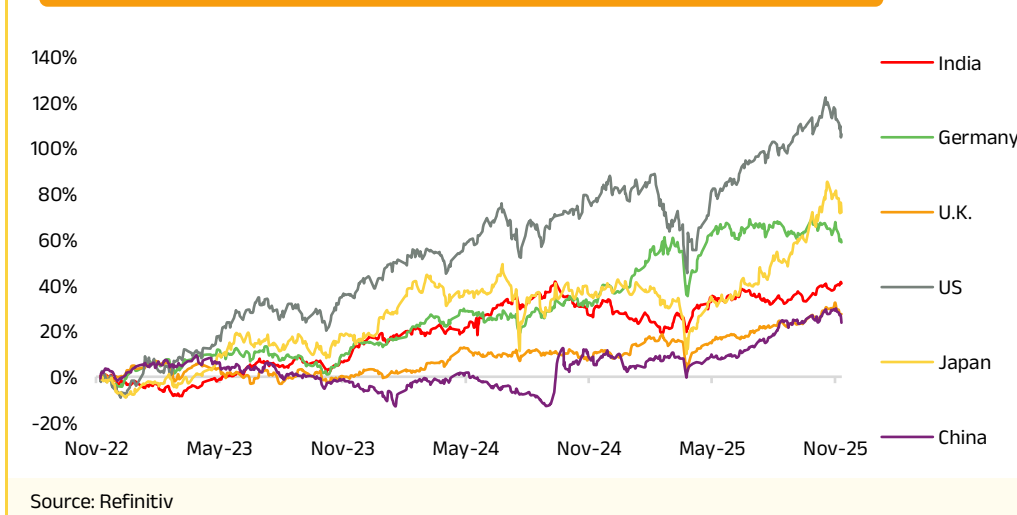
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

### Global & Domestic Commodity Market

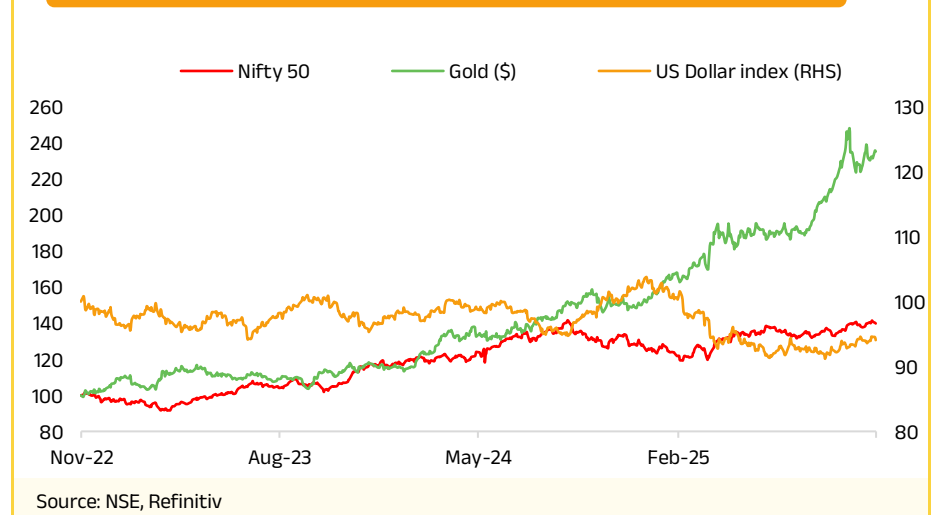
Commodity Prices	25-Nov-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	124,691	1.56%	2.61%	-1.71%
Gold (\$/oz)	4,129.95	-0.22%	1.53%	0.45%
Silver (INR/1 kg)	155,946	1.77%	1.62%	-1.70%
Silver (\$/oz)	51.40	0.00%	1.41%	5.78%
Brent Crude(\$/bbl)	64.39	1.63%	1.66%	-2.98%
Crude Oil (INR/1 bbl)	5,248.00	2.10%	-1.17%	-3.42%
NYMEX Crude(\$/bbl)	58.15	-1.46%	-5.31%	-6.47%
Natural Gas (INR/1 mmbtu)	405.70	-0.69%	4.97%	37.95%
Aluminium (INR/1 kg)	268.60	0.45%	1.30%	0.66%
Copper (INR/1 kg)	1,014.50	0.81%	1.75%	1.71%
Nickel (INR/1 kg)	1,326.40	1.17%	2.09%	-2.05%
Lead (INR/1 kg)	185.70	0.38%	-0.48%	1.56%
Zinc (INR/1 kg)	311.65	-0.03%	0.53%	2.58%
Mentha Oil (INR/1 kg)	1,015.00	-0.07%	0.25%	1.40%
Baltic Dry Index	2,309	0.61%	4.20%	15.97%

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

### Comparative Performance of Major Global Equity Market



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



### Term of the Day



#### ESG Investing

Definition: ESG investing focuses on companies that meet standards in Environmental, Social, and Governance factors, alongside financial performance.



#### Explanation

Environmental criteria assess sustainability practices, Social criteria look at labor policies and community impact, and Governance covers board structure and transparency. For example, Company X with strong renewable energy initiatives, fair employee practices, and robust governance may score high on ESG metrics. Investors use ESG strategies to align portfolios with ethical values and reduce long-term risks like regulatory penalties or reputational damage. ESG investing is gaining traction globally as stakeholders demand responsible business practices.

### Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.01	4.03	5.02	14.03
Flexi Cap Fund	-0.45	4.54	3.15	15.79
Mid Cap Fund	0.12	6.13	3.94	21.23
Large & Mid Cap Fund	-0.11	4.94	4.37	17.83
Small Cap Fund	-1.61	3.57	-1.33	19.08
Multi Cap Fund	-0.36	4.76	3.20	18.30
Focused Fund	-0.38	4.19	3.55	15.25
Value Fund	0.28	4.40	3.13	18.23
Contra Fund	0.20	4.91	3.73	19.46
ELSS	-0.35	4.19	3.36	16.53
Equity Savings	0.36	3.69	6.41	9.82
Arbitrage Fund	0.52	2.91	6.29	6.91
Dividend Yield Fund	-0.35	3.79	2.16	18.43
Aggressive Hybrid Fund	-0.23	3.76	4.94	13.86
Balanced Advantage	0.13	3.36	4.85	11.58

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.

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