

Domestic Market Performance

Indian market indices	12-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25876	0.70	2.34	10.02	8.34
BSE Sensex	84467	0.71	2.38	9.11	7.36
BSE 100	27131	0.63	2.39	10.39	7.69
BSE 200	11744	0.61	2.40	10.76	7.09
BSE 500	37386	0.61	2.06	11.34	6.33
BSE SmallCap	53256	0.76	-0.23	14.19	-0.65
BSE MidCap	47360	0.44	2.15	14.04	4.62
BSE LargeCap	9959	0.63	2.24	10.25	7.46
Sectoral indices					
BSE IT	36031	1.95	2.99	-0.25	-15.00
BSE Oil & Gas	29079	0.72	6.27	15.70	8.48
BSE FMCG	20416	0.15	0.91	4.98	-2.20
BSE Auto	61240	1.15	2.71	28.38	16.36
BSE Bankex	65360	0.20	2.33	9.77	12.06
BSE Teck	18103	1.77	4.54	4.34	-5.83
BSE Capital Goods	71167	0.15	2.32	13.46	5.02
BSE Consumer Durable	61544	1.86	3.30	13.17	1.44

Turnover (Rs Cr)	12-Nov	11-Nov
BSE Cash	7934	7190
NSE Cash	115992	104375
NSE F&O	10069100	66208370

Rs. Cr (Equity)	FII Inv 11-Nov	MF Inv 10-Nov	DII Inv 12-Nov
Buy	17,470	14,978	17,651
Sell	15,288	10,127	12,563
Net	2,181	4,851	5,087
Net (MTD)	-96	15,684	28,019
Net (YTD)	-145,081	438,376	636,625

	12-Nov	1Day	Month ago	Year ago
USD	88.64	88.70	88.69	84.39
GBP	116.45	116.80	118.01	108.23
Euro	102.64	102.54	102.62	89.69
100 Yen	57.31	57.53	58.02	54.77

Indian markets

- Indian equity benchmarks closed higher on Wednesday as financial and IT stocks gained because of optimism over a potential US trade deal and hopes of an end to the US government shutdown.
- The top gainers were Adani Enterprises, Asian Paints, Tech Mahindra, TCS and HDFC Life—up 2.51%-4.97%.
- The top losers were TMPV, Tata Steel, Shriram Finance, JSW Steel and Bharat Electronics—down 0.60%-1.34%.

Indian debt

- The interbank call money rate ended higher at 5.00% on Wednesday compared to 4.90% on Tuesday.
- Government bond prices ended marginally higher on Wednesday after steady core inflation offset record-low inflation, capping gains from suspected RBI buying.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.50% on Wednesday compared to 6.51% on Tuesday.

Indian Rupee

- The rupee ended higher against the US dollar on Wednesday on optimism over a US-India trade deal and possible foreign fund inflows.

Regulatory

- The Reserve Bank of India (RBI) created a public platform called Sachet to help people check the legitimacy of financial schemes and report unauthorised deposit-taking activities.
- A high-level committee appointed by the Securities and Exchange Board of India (Sebi) has proposed a far-reaching revamp of conflict-of-interest and disclosure norms across the regulator's hierarchy.
- The National Commodity and Derivatives Exchange (NCDEX) received board's approval to launch a mutual fund distribution platform as part of its cash segment and plans to go live by April 2026, subject to regulatory clearance from SEBI.

Economy and Government

- India consumer price inflation rate eased to 0.25% in October of 2025 compared to downwardly revised 1.44% in September 2025.
- Union Minister Murlidhar Mohol said the Centre has approved the purchase of 1,000 electric buses for Pune under the PM E-DRIVE scheme, giving a major push to the city's public transport network.
- The Uttar Pradesh Real Estate Regulatory Authority (UP RERA) approved six new real estate projects involving a proposed investment of Rs 863.94 crore across five districts of the state.
- Maharashtra government launched an incentive scheme to reward cooperative and private sugar mills for quality performance and financial capacity.
- The Ministry of Coal has issued a detailed framework to decide the value of assets belonging to companies whose coal blocks were cancelled in 2014.
- The government approved a Rs 45,000 crore package to support exports struggling under the steep 50% US tariffs and sluggish global trade.

Domestic Debt Market Indicators

Instrument	12-Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.00%	4.90%	5.00%	5.05%	7.00%	5.75%
3-Month T-Bill	5.42%	5.44%	5.43%	5.45%	6.34%	6.44%
6-Month T-Bill	5.57%	5.56%	5.52%	5.51%	6.47%	6.60%
1-year T-Bill	5.55%	5.55%	5.55%	5.54%	6.40%	6.55%
3-Month CD	6.00%	6.00%	5.95%	5.82%	7.00%	7.17%
6-Month CD	6.22%	6.22%	6.19%	6.10%	7.25%	7.42%
1-year CD	6.39%	6.39%	6.37%	6.32%	7.15%	7.50%
3-Month CP	6.54%	6.56%	6.55%	6.25%	7.25%	7.45%
6-Month CP	6.65%	6.74%	6.72%	6.39%	7.55%	7.71%
1-year CP	6.78%	6.87%	6.90%	6.80%	7.45%	7.79%
1-year Gilt	5.54%	5.54%	5.58%	5.59%	6.40%	6.70%
3-year Gilt	5.91%	5.90%	5.91%	5.96%	6.44%	6.72%
5-year Gilt	6.16%	6.16%	6.14%	6.27%	6.45%	6.77%
1-year AAA	6.60%	6.55%	6.62%	6.59%	7.29%	7.59%
3-year AAA	6.75%	6.70%	6.86%	6.77%	7.11%	7.35%
5-year AAA	6.82%	6.77%	6.90%	6.81%	7.11%	7.30%
10-year G-sec	6.50%	6.50%	6.53%	6.48%	6.58%	6.80%
Net LAF (Rs Cr)	211058	201366	143999	262981	-9354	205389
Forex reserves (\$ bn)	689.73	695.36	699.96	688.87	642.49	682.13

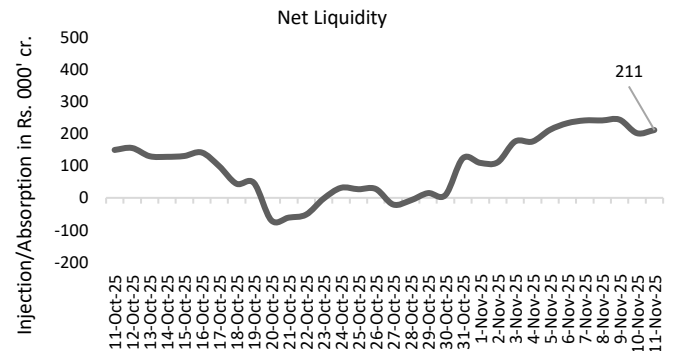
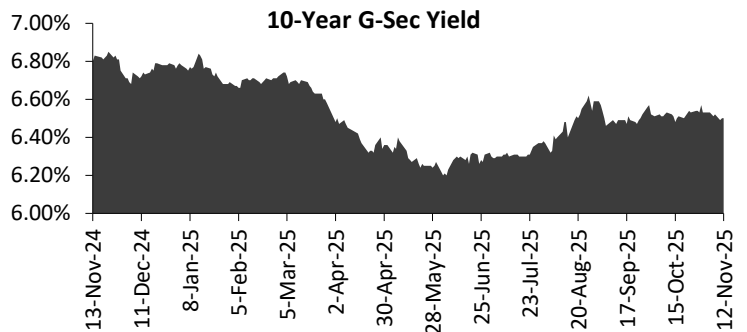
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.57	6.47	7.18	7.22	8.45	8.98
1 Year	5.54	6.60	7.31	7.35	8.58	9.11
3 Year	5.91	6.75	7.46	7.50	8.73	9.26
5 Year	6.16	6.82	7.63	7.66	8.90	9.43
10 Year	6.50	7.10	7.91	7.94	9.18	9.71

Rs. Cr (Debt)	FII Inv 11-Nov	MF Inv 10-Nov
Buy	355	9,755
Sell	90	14,770
Net	265	-5,014
Net (MTD)	-1,587	-16,553
Net (YTD)	10,841	-492,397

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	0.25% (Oct'25)	1.61% (Jul'25)	6.21% (Oct'24)
WPI	0.13% (Sep-25)	-0.19% (Jun-25)	1.84% (Sep-24)
IIP	4.0% (Sep-25)	1.5% (Jun-25)	3.2% (Sep-24)
GDP	7.8% (Apr-Jun FY26)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY25)
India Manufacturing PMI	59.2 (Oct-25)	59.1 (Jul-25)	59.2 (Oct-24)
India Service PMI	58.9 (Oct-25)	60.5 (July-25)	58.9 (Oct-24)
Bank Credit Growth*	-0.89% (Oct 17, 2025)		2.35% (Oct 03, 2025)
Bank Deposit Growth*	-0.28% (Oct 17, 2025)		1.92% (Oct 03, 2025)

Capital markets

- Aequus Ltd. raised approximately Rs 144 crore through a pre-IPO placement by allotting 11,615,713 equity shares, representing 1.88% of the company's pre-IPO offer share capital.
- Niveshaay led a Rs 325 crore funding round in Waaree Energy Storage Systems to expand the Waaree Group's battery arm.
- A91 Partners, Catamaran Ventures, and Xponentia Capital-backed Sedemac Mechatronics Ltd filed its draft red herring prospectus (DRHP) with the Securities and Exchange Board of India (SEBI) to launch an initial public offering.



Global market indices	12-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	48254.82	0.68	6.10	14.89	9.89
Nikkei 225	51063.31	0.43	6.19	43.37	29.68
FTSE	9911.42	0.12	5.13	15.48	23.49
Hang Seng	26922.73	0.85	2.41	16.45	35.65
Taiwan	27947.09	0.58	2.70	35.04	21.61

Global debt	12-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.08	4.13	4.05	4.29	4.23	4.43
UK 10-Year (%)	4.40	4.38	4.67	4.62	4.68	4.50
German 10-Year (%)	2.65	2.66	2.63	2.74	2.73	2.35
Japan 10-Year (%)	1.70	1.69	1.69	1.51	1.49	1.03

Domestic	12-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	123913	-0.19	1.97	38.97	65.44
Silver (Rs / Kg)	156705	1.26	-4.74	55.32	77.57
Aluminium (Rs / Kg)	273	-0.31	2.55	8.88	15.12
Copper (Rs / kg)	1007	-0.14	0.21	12.11	23.72
Lead (Rs / kg)	187	1.58	1.22	0.08	0.40
Zinc (Rs / Kg)	313	0.00	5.35	14.05	13.06
Nickel (Rs / kg)	1339	0.08	-1.28	-5.38	-1.66

Global	12-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4110.22	-0.10	3.14	32.54	57.40
Silver (oz/\$)	5092.00	1.15	1.47	49.24	66.84
Brent (\$/bbl)	62.71	-3.76	-0.03	-16.13	-12.77
NYMEX crude (\$/bbl)	58.49	-4.18	-0.70	-18.17	-14.14

Upcoming market indicators

Date	Indicator	Previous
Nov 13	UK GDP, Sep	1.3%
Nov 14	India WPI Inflation, Oct	0.13%
Nov 15	India Unemployment Rate, Oct	5.2%
Nov 18	US Export Prices, Sep	3.4%
Nov 19	Eurozone Inflation Rate Final, Oct	2.2%

Source: Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites

Abbreviations: FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

*Note: Bank credit and deposit growth are calculated on fortnightly basis. #flash PMI numbers

Global markets

- Wall Street stocks closed mixed on Wednesday with Dow Jones gaining on optimism over to an end to the US government shutdown while Nasdaq declined due to high-valued tech stocks.
- 10-year US bond yield ended lower to 4.08% as end of the government shutdown nears.
- FTSE index closed higher on Wednesday supported by gains in utility and mining stocks.
- Asian markets were trading mostly lower at 8.30 AM.
- UK RICS Residential Market Survey showed the house price balance slipped to -19% in October 2025 from a downwardly revised -17% in September.
- Japan producer prices rose 2.7% in October 2025, compared to a marginally revised 2.8% gain in September 2025.

Commodity

- Crude oil prices fell by \$2.55 to \$58.49 a barrel on the NYMEX after an OPEC+ report forecasted a supply-demand balance by 2026.
- Domestic gold prices fell due to profit booking.

Forthcoming results

Date	Company
13-Nov	Eicher Motors
13-Nov	Samvardhana Motherson International Limited
14-Nov	Max Healthcare Institute Limited

	Indicators	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25
Debt Indicators	Currency in circulation (Rs billion)	38184	38071	38097	38147	38372	38344	37762	36997	36444	35893
	Repo rate	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%
	10-year G-sec yield	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%
	Call rate	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%
	Forex reserves (\$ billion; mthly. avg.)	699	701	693	698	699	689	682	656	638	629
	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32	2304.18	1773.1	2554.5
	IIP, %y/y	NA	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%
	Exports, \$ billion	NA	36.38	35.1	37.24	35.14	38.73	38.49	41.97	36.91	36.43
	Imports, \$ billion	NA	68.53	61.59	64.59	53.92	60.61	64.91	63.51	50.96	59.42
	Manufacturing PMI	59.2	57.7	59.3	59.1	58.4	57.6	58.2	58.1	56.3	57.7
	Services PMI	58.8	60.9	62.9	60.5	60.4	58.8	58.7	58.5	59	56.5
	GST collections (Rs crore)	195936	189017	186315	195735	184597	201050	236716	196141	183646	195506
	India crude oil import (mbpd)	NA	19.934	19.6	18.56	20.32	21.3	21.0	22.7	19.1	21.2
Sector update	Auto – Passenger vehicles	NA	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%
	Auto – Two-wheelers	NA	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%
	Auto – Commercial vehicles	NA	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%
	Auto – Tractors	NA	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%	25.40%	13.60%	11.39%
	Infra – Coal	NA	-1.20%	11.40%	-	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%
	Infra – Electricity	NA	2.1%	3.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%	3.6%	2.3%
	Infra – Steel	NA	14.10%	14.20%	16.60%	9.70%	7.4%	4.4%	8.7%	6.9%	4.7%
	Infra – Cement	NA	5.30%	6.10%	11.60%	8.20%	9.7%	6.3%	12.2%	10.7%	14.3%

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