

Domestic Market Performance

Indian market indices	13-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25879	0.01	2.58	10.03	9.85
BSE Sensex	84479	0.01	2.61	9.12	8.74
BSE 100	27126	-0.02	2.56	10.37	9.25
BSE 200	11739	-0.04	2.55	10.71	8.81
BSE 500	37355	-0.08	2.17	11.24	8.17
BSE SmallCap	53096	-0.30	-0.10	13.85	2.20
BSE MidCap	47199	-0.34	1.99	13.65	7.01
BSE LargeCap	9960	0.01	2.45	10.26	9.07
Sectoral indices					
BSE IT	35829	-0.56	3.34	-0.81	-14.84
BSE Oil & Gas	29025	-0.19	6.27	15.48	10.25
BSE FMCG	20317	-0.49	1.27	4.47	-2.03
BSE Auto	61059	-0.30	2.56	28.00	18.69
BSE Bankex	65445	0.13	2.35	9.91	14.42
BSE Teck	18090	-0.07	4.92	4.27	-5.39
BSE Capital Goods	70666	-0.70	2.47	12.66	7.19
BSE Consumer Durable	62073	0.86	4.84	14.14	3.20

Turnover (Rs Cr)	13-Nov	12-Nov
BSE Cash	9916	7934
NSE Cash	110638	115992
NSE F&O	12045388	10069100

Rs. Cr (Equity)	FII Inv 12-Nov	MF Inv 11-Nov	DII Inv 13-Nov
Buy	17,467	10,393	14,891
Sell	17,929	9,739	12,023
Net	-462	654	2,868
Net (MTD)	-558	16,338	30,887
Net (YTD)	-145,543	439,030	639,493

	13-Nov	1Day	Month ago	Year ago
USD	88.72	88.64	88.78	84.38
GBP	116.39	116.45	118.64	107.60
Euro	102.76	102.64	103.21	89.69
100 Yen	57.26	57.31	58.48	54.51

Indian markets

- Indian equity benchmarks closed flat on Thursday as gains from easing inflation data and hopes of a US-India trade deal were offset by caution ahead of the Bihar election results.
- The top gainers were Asian Paints, Hindalco, ICICI Bank, Interglobe Aviation Ltd and Larsen & Toubro Ltd., up 1.21-3.96%.
- The top losers were Eternal, Mahindra & Mahindra, ONGC, Bharat Electronics and Trent, down 1.13-3.58%.

Indian debt

- The interbank call money rate ended higher at 5.30% on Thursday compared to 5.00% on Wednesday.
- Government bond prices fell on Thursday due to fall in suspected RBI purchases, along with a higher-than-expected October core inflation.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.52% on Thursday compared to 6.50% on Wednesday.

Indian Rupee

- The rupee ended lower against the US dollar on Thursday after the dollar index strengthened as the US government found a resolution to the shutdown.

Regulatory

- RBI Mandated Transition to “.bank.in” Domain Marks a Significant Step Towards Safer and More Authentic Online Banking Experiences.

Economy and Government

- Moody’s Ratings said that India’s economy is expected to grow by around 6.5% through 2027.
- India imposed a five-year anti-dumping duty on hot-rolled flat products of alloy or non-alloy steel from Vietnam to protect domestic producers from unfairly priced imports.
- Prime Minister Narendra Modi announced that the Union Cabinet’s approval of an Export Promotion Mission and a Credit Guarantee Scheme will enhance global competitiveness and foster self-reliance.
- The government released the draft Seeds Bill of 2025 that proposes to replace the decades-old Seeds Act of 1966 and the Seeds (Control) Order of 1983.
- The Ministry of External Affairs launched Passport Seva Programme V2.0 and Global Passport Seva Programme V2.0.
- CN Water and Taipure formed a strategic partnership to collaborate on ultrapure water and water recycling systems for India’s high-technology industries, including semiconductor, green energy, and EV battery sectors.
- The government has asked all ministries and departments to furnish additional details for central sector and centrally sponsored schemes that are ending or continuing beyond March 31, 2026, as it prepares to align scheme allocations with the 16th Finance Commission cycle.

## Domestic Debt Market Indicators

Instrument	13-Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.30%	5.00%	5.50%	5.00%	7.00%	6.60%
3-Month T-Bill	5.41%	5.42%	5.43%	5.46%	6.34%	6.44%
6-Month T-Bill	5.54%	5.57%	5.52%	5.55%	6.47%	6.59%
1-year T-Bill	5.53%	5.55%	5.54%	5.55%	6.40%	6.58%
3-Month CD	5.95%	6.00%	5.92%	5.83%	7.00%	7.16%
6-Month CD	6.22%	6.22%	6.18%	6.11%	7.25%	7.42%
1-year CD	6.39%	6.39%	6.38%	6.29%	7.15%	7.50%
3-Month CP	6.55%	6.54%	6.55%	6.25%	7.25%	7.45%
6-Month CP	6.68%	6.65%	6.71%	6.39%	7.55%	7.71%
1-year CP	6.85%	6.78%	6.90%	6.80%	7.45%	7.79%
1-year Gilt	5.59%	5.54%	5.59%	5.58%	6.40%	6.72%
3-year Gilt	5.90%	5.91%	5.90%	5.98%	6.44%	6.72%
5-year Gilt	6.17%	6.16%	6.16%	6.29%	6.45%	6.77%
1-year AAA	6.60%	6.60%	6.63%	6.62%	7.29%	7.59%
3-year AAA	6.75%	6.75%	6.86%	6.80%	7.11%	7.35%
5-year AAA	6.82%	6.82%	6.90%	6.84%	7.11%	7.30%
10-year G-sec	6.51%	6.50%	6.52%	6.48%	6.58%	6.80%
Net LAF (Rs Cr)	210486	211058	129743	290262	-9354	212260
Forex reserves (\$ bn)	689.73	695.36	699.96	688.87	642.49	682.13

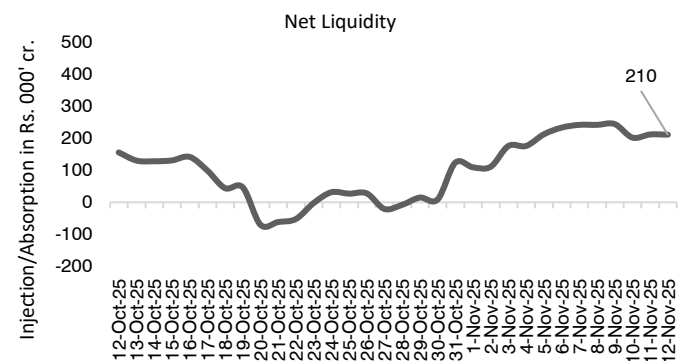
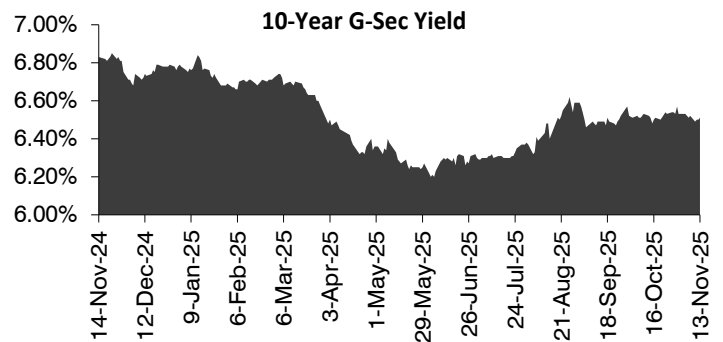
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.54	6.47	7.18	7.22	8.45	8.98
1 Year	5.59	6.60	7.31	7.35	8.58	9.11
3 Year	5.90	6.75	7.46	7.50	8.73	9.26
5 Year	6.17	6.82	7.63	7.66	8.90	9.43
10 Year	6.51	7.10	7.91	7.94	9.18	9.71

Rs. Cr (Debt)	FII Inv 12-Nov	MF Inv 11-Nov
Buy	316	19,555
Sell	350	22,905
Net	-35	-3,349
Net (MTD)	-1,621	-19,903
Net (YTD)	10,806	-495,747

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

- Hyderabad Angel Fund (haf.vc) announced a Rs 100 crore venture capital initiative to back high-potential startups across the country in areas such as generative AI, gaming, spacetechnology, and drones.
- Brandworks Technologies secured \$4 million in its second funding tranche from Roha Family Office, following a \$7 million raise in August.
- ReNew plans to invest Rs 82,000 crore spanning the entire spectrum of renewable energy value chain.
- Marine Electricals (India) bagged multiple new orders worth about Rs 175 crore.
- KEP Engineering plans to invest Rs 100 crore in the next five years to expand manufacturing and enhance engineering capabilities.
- Kotak Life Science Fund I invested Rs 40 crore in Mediversal Healthcare, a regional player focused on affordable and accessible medical care in Eastern India.
- DHL Group plans 1-billion-euro investment across its businesses in India by 2030.
- PhonePe announced a partnership with ChatGPT maker OpenAI to integrate the artificial intelligence (AI) company's features across its platform.
- BioVaram signed a MoU with Japan's Teijin Limited to collaborate on expanding usage of Regenerative Medicine products and Implantable medical devices in Japan and India.
- Juniper Green Energy secured a significant deal with Gujarat Urja Vikas Nigam Limited for a 50 MW wind project in Gujarat.



Global market indices	13-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47457.22	-1.65	3.02	12.99	7.96
Nikkei 225	51281.83	0.43	6.64	43.98	32.44
FTSE	9807.68	-1.05	3.86	14.27	22.13
Hang Seng	27073.03	0.56	4.57	17.10	36.57
Taiwan	27903.56	-0.16	3.64	34.83	22.06

Global debt	13-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.11	4.08	4.05	4.24	4.23	4.44
UK 10-Year (%)	4.44	4.40	4.65	4.59	4.68	4.52
German 10-Year (%)	2.69	2.65	2.63	2.68	2.73	2.38
Japan 10-Year (%)	1.69	1.70	1.69	1.51	1.49	1.05

Domestic	13-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	126554	2.13	1.93	41.93	68.16
Silver (Rs / Kg)	162730	3.84	-7.18	61.29	81.32
Aluminium (Rs / Kg)	274	0.20	3.69	9.10	16.38
Copper (Rs / kg)	1016	0.88	2.63	13.10	26.40
Lead (Rs / kg)	186	-0.54	-1.38	-0.46	0.24
Zinc (Rs /Kg)	316	1.05	6.91	15.25	13.64
Nickel (Rs / kg)	1338	-0.10	-1.28	-5.48	-1.28

Global	13-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4207.00	2.35	4.73	35.66	64.09
Silver (oz/\$)	5348.00	5.03	6.77	56.74	75.23
Brent (\$/bbl)	63.01	0.48	-0.49	-15.73	-12.83
NYMEX crude (\$/bbl)	58.69	0.34	-1.34	-17.89	-14.23

## Upcoming market indicators

Date	Indicator	Previous
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%
Nov 20	US Kansas Fed Manufacturing Index, Nov	15

**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 ended lower on Thursday led by fall in tech companies amid fresh uncertainty as key inflation and jobs reports remain missing after the US shutdown.
- 10-year US bond yield ended higher at 4.11% as investors welcomed the end of the longest government shutdown in U.S. history.
- FTSE index declined on Thursday weighed down by financial shares following disappointing third-quarter economic growth data.
- Asian markets were trading mostly lower at 8.30 AM.
- Eurozone industrial production rose 1.2% year-over-year in September 2025, the same pace as in the previous month.
- The UK economy expanded 1.3% year-on-year in Q3 2025, compared to 1.4% in Q2 2025.
- The UK trade deficit narrowed to £1.09 billion in September 2025, down from a downwardly revised £1.28 billion in August.
- UK construction output rose 1.3% year-on-year in September 2025, compared to upwardly revised 1.1% growth in August 2025.
- UK Industrial production fell 2.5% year-on-year in September 2025, compared to a revised 0.5% decline in August 2025 while the manufacturing production declined by 2.2% from a revised 0.7% fall.
- China Outstanding loan growth increased 6.5% year-on-year in October 2025, compared to a 6.6% rise in September 2025.
- China's new home prices across 70 cities dropped 2.2% year-on-year in October 2025, matching the pace of decline in the previous month while remaining at the slowest decline since March 2024.
- China's industrial production grew by 4.9% year-on-year in October 2025, slowing from September's three-month high of 6.5%.
- China's retail sales rose 2.9% on year in October 2025, easing slightly from September's 3.0% increase.
- China's surveyed urban unemployment rate fell to 5.1% in October 2025 from September's 5.2%.
- Fixed Asset Investment in China decreased to -1.70% in October from -0.50% in September of 2025.

## Commodity

- Crude oil prices rose by 32 cents to \$59.75 a barrel on the NYMEX amid hopes that Hungary to keep using Russian oil following talks between US President and Hungarian Prime Minister.
- Domestic gold prices fell due to strong dollar index.

## Forthcoming results

Date	Company
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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