

Domestic Market Performance

Indian market indices	17-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	26013	0.40	1.18	10.60	10.54
BSE Sensex	84951	0.46	1.19	9.73	9.50
BSE 100	27277	0.53	1.38	10.98	9.86
BSE 200	11806	0.52	1.60	11.34	9.27
BSE 500	37571	0.54	1.44	11.89	8.59
BSE SmallCap	53443	0.59	0.76	14.59	2.03
BSE MidCap	47500	0.66	2.46	14.37	7.25
BSE LargeCap	10013	0.49	1.26	10.84	9.56
Sectoral indices					
BSE IT	35493	0.22	3.84	-1.74	-15.65
BSE Oil & Gas	29002	0.46	6.13	15.39	10.69
BSE FMCG	20489	0.30	-1.29	5.35	0.15
BSE Auto	61246	0.86	1.02	28.39	18.35
BSE Bankex	66157	0.77	1.69	11.11	15.50
BSE Teck	18018	0.35	4.72	3.85	-5.76
BSE Capital Goods	71202	0.60	3.10	13.52	7.84
BSE Consumer Durable	62624	0.53	2.62	15.16	4.17

Turnover (Rs Cr)	17-Nov	14-Nov
BSE Cash	7982	8843
NSE Cash	99600	112397
NSE F&O	23615002	24845069

Rs. Cr (Equity)	FII Inv 14-Nov	MF Inv 13-Nov	DII Inv 17-Nov
Buy	12,650	11,720	12,370
Sell	17,311	10,509	11,169
Net	-4,661	1,210	1,200
Net (MTD)	-3,166	21,279	40,246
Net (YTD)	-148,151	443,970	648,852

	17-Nov	1Day	Month ago	Year ago
USD	88.63	88.74	87.91	84.40
GBP	116.45	116.72	118.27	106.83
Euro	102.79	103.32	102.98	88.80
100 Yen	57.26	57.44	58.66	54.07

Indian markets

- Indian equity benchmarks closed higher on Monday, driven by gains in financial stocks amid improving Q2 earnings expectations and optimism of more support measures for exporters from the Reserve Bank of India (RBI).
- The top gainers were Eternal, Tata Consumer Products, Max Healthcare, Eicher Motors and Maruti Suzuki—up 1.24-1.98%.
- The top losers were TMPV, Adani Enterprises, Jio Financial, UltraTech Cement and Asian Paints—down 0.64-4.73%.

Indian debt

- The interbank call-money rate ended lower at 4.95% on Monday compared to 5.45% on Friday.
- Government bond prices fell on Monday due to weak demand-supply dynamics and fading rate-cut hopes amid slowing RBI purchases.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.55% on Monday compared to 6.53% on Friday.

Indian Rupee

- The rupee closed higher against the US dollar on Monday due to a decline in crude oil prices.

Regulatory

- SEBI Chairman Tuhin Kanta Pandey said, SEBI is aiming to double the number of equity market investors in the next three-five years.
- Chairman Tuhin Kanta Pander said Sebi is in advanced stages of a comprehensive review of stockbrokers regulations while the preparatory work for Settlement and LODR Regulations has started and public consultations will follow..

Economy and Government

- India unemployment rate was at 5.2% in October of 2025, remaining unchanged from September 2025.
- India's merchandise trade deficit widened to a record high of \$41.68 billion in October, up compared to \$32.15 billion in September, driven largely by an increase in gold and silver imports, government data showed.
- Union Minister for Petroleum and Natural Gas Hardeep Singh Puri announced that Indian public sector oil companies have, for the first time, signed a one-year deal to import liquefied petroleum gas (LPG) from the United States in a major step towards strengthening India's energy security.
- The government approved 17 projects entailing about Rs 7,172 cr investment across six categories under the Electronics Component Manufacturing Scheme (ECMS).
- Karnataka launched KEO, a RISC-V-based, AI-ready personal computer designed to offer affordable, locally built computing to students, households and small businesses, aiming to narrow the state'.

Domestic Debt Market Indicators

Instrument	17-Nov	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	4.95%	5.45%	5.50%	5.10%	7.00%	6.25%
3-Month T-Bill	5.38%	5.40%	5.43%	5.46%	6.34%	6.44%
6-Month T-Bill	5.52%	5.55%	5.53%	5.53%	6.47%	6.61%
1-year T-Bill	5.54%	5.52%	5.52%	5.54%	6.40%	6.58%
3-Month CD	6.01%	5.97%	5.97%	5.81%	7.00%	7.14%
6-Month CD	6.22%	6.22%	6.18%	6.09%	7.25%	7.40%
1-year CD	6.38%	6.39%	6.40%	6.29%	7.15%	7.54%
3-Month CP	6.54%	6.53%	6.58%	6.28%	7.25%	7.46%
6-Month CP	6.68%	6.68%	6.75%	6.38%	7.55%	7.73%
1-year CP	6.85%	6.85%	6.94%	6.80%	7.45%	7.79%
1-year Gilt	5.57%	5.57%	5.57%	5.59%	6.40%	6.73%
3-year Gilt	5.92%	5.92%	5.87%	5.96%	6.44%	6.74%
5-year Gilt	6.21%	6.18%	6.13%	6.25%	6.45%	6.81%
1-year AAA	6.63%	6.63%	6.63%	6.57%	7.29%	7.59%
3-year AAA	6.78%	6.76%	6.84%	6.75%	7.11%	7.35%
5-year AAA	6.85%	6.83%	6.88%	6.79%	7.11%	7.30%
10-year G-sec	6.55%	6.53%	6.51%	6.40%	6.58%	6.83%
Net LAF (Rs Cr)	180882	181056	98883	303341	-9354	181380
Forex reserves (\$ bn)	687.03	689.73	697.78	688.87	642.49	682.13

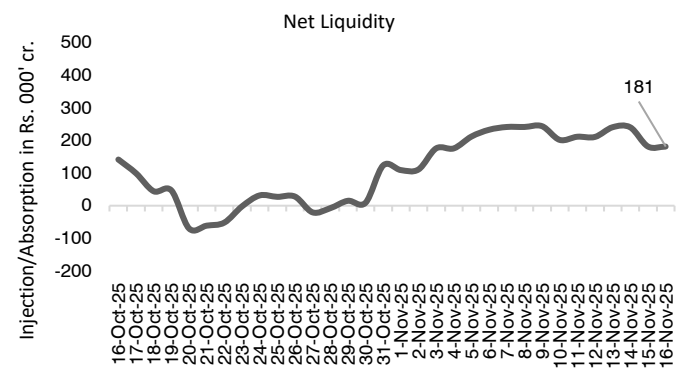
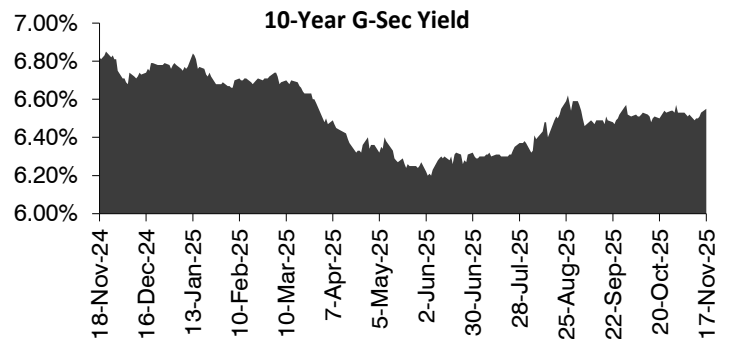
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.52	6.47	7.18	7.22	8.45	8.98
1 Year	5.57	6.63	7.34	7.38	8.61	9.14
3 Year	5.92	6.78	7.49	7.53	8.76	9.29
5 Year	6.21	6.85	7.66	7.69	8.93	9.46
10 Year	6.55	7.13	7.94	7.97	9.21	9.74

Rs. Cr (Debt)	FII Inv 14-Nov	MF Inv 13-Nov
Buy	385	17,054
Sell	391	25,336
Net	-6	-8,283
Net (MTD)	-2,205	-29,330
Net (YTD)	10,223	-505,174

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	0.25% (Oct'25)	1.61% (Jul'25)	6.21% (Oct'24)
WPI	-1.21% (Oct-25)	-0.58% (Jul-25)	2.36% (Oct-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*	1.22% (Oct 31, 2025)		-0.89% (Oct 17, 2025)
Bank Deposit Growth*	0.93% (Oct 31, 2025)		-0.28% (Oct 17, 2025)

Capital markets

- IRB Infrastructure Developers Ltd received a Letter of Award (LoA) from the National Highways Authority of India (NHAI) for Rs 9,270-crore TOT-17 project.
- Anant Raj announced that its wholly owned subsidiary had signed a Rs 4,500-crore Memorandum of Understanding (MoU) with the Andhra Pradesh Economic Development Board (APEDB).
- Kings Infra Ventures Ltd announced signing of an agreement with the Andhra Pradesh government to develop a Rs 2,500-crore aquaculture technology park near Srikakulam.
- RJ Corp plans to invest Rs 1,743 crore in a 2 GW solar cell and module facility in Naidupeta, boosting Andhra Pradesh's fast-growing clean-tech ecosystem.
- KEC International announced securing new orders worth Rs 1,016 crore across various businesses.
- Greenbay Infrastructure announced the launch of its luxury residential project The Monarque, with the development expected to have a potential topline of Rs 1,000 crore.
- CCI Projects plans to invest around Rs 700 crore to develop a luxury housing tower in the Mumbai Metropolitan Region (MMR).



Global market indices	17-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	46590.24	-1.18	0.87	10.92	6.49
Nikkei 225	50323.91	-0.10	5.76	41.29	30.59
FTSE	9675.43	-0.24	3.43	12.73	19.88
Hang Seng	26384.28	-0.71	4.50	14.12	35.75
Taiwan	27447.31	0.18	0.53	32.62	20.83

Global debt	17-Nov	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.13	4.14	4.02	4.33	4.23	4.43
UK 10-Year (%)	4.54	4.58	4.53	4.70	4.68	4.48
German 10-Year (%)	2.71	2.72	2.58	2.78	2.73	2.34
Japan 10-Year (%)	1.73	1.70	1.63	1.56	1.49	1.05

Domestic	17-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	122924	-1.50	-5.14	37.86	66.70
Silver (Rs / Kg)	154933	-2.78	-8.45	53.56	77.87
Aluminium (Rs / Kg)	271	-0.66	2.99	7.85	15.68
Copper (Rs / kg)	1005	-0.50	1.89	11.88	27.93
Lead (Rs / kg)	186	0.24	1.44	-0.16	2.36
Zinc (Rs /Kg)	313	0.16	6.81	14.00	13.46
Nickel (Rs / kg)	1336	0.74	-0.59	-5.60	-0.37

Global	17-Nov	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4080.78	-2.62	-4.88	31.59	58.85
Silver (oz/\$)	5062.00	-4.89	-6.22	48.36	65.86
Brent (\$/bbl)	64.20	-0.14	4.75	-14.14	-11.52
NYMEX crude (\$/bbl)	59.91	-0.07	4.12	-16.19	-12.79

Global markets

- Wall Street stocks closed lower on Monday as investors turned cautious ahead of key earnings and a long-delayed US jobs report.
- 10-year US bond yield ended lower at 4.13% in anticipation of a packed week of delayed economic data releases.
- FTSE index closed lower on Monday dragged down by losses in financials as investors were cautious ahead of a data-heavy week.
- Asian markets were trading mostly lower at 8.30 AM.
- US NY Empire State Manufacturing Index jumped to 18.7 in November 2025, compared to 10.7 in October 2025.
- Japan Industrial Production increased 3.8% in September 2025 compared to a decline of 1.6% in August 2025.

Commodity

- Crude oil prices fell marginally by 4 cents to \$59.91 a barrel on the NYMEX as Russia's export hub resumed loadings after a two-day suspension.
- Domestic gold prices fell as investors await a busy week of US economic releases that could impact the Federal Reserve's rate outlook.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
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
Nov 21	Japan Inflation Rate, Oct	2.9%
Nov 24	US Chicago Fed National Activity Index, Sep	-0.12

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

	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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