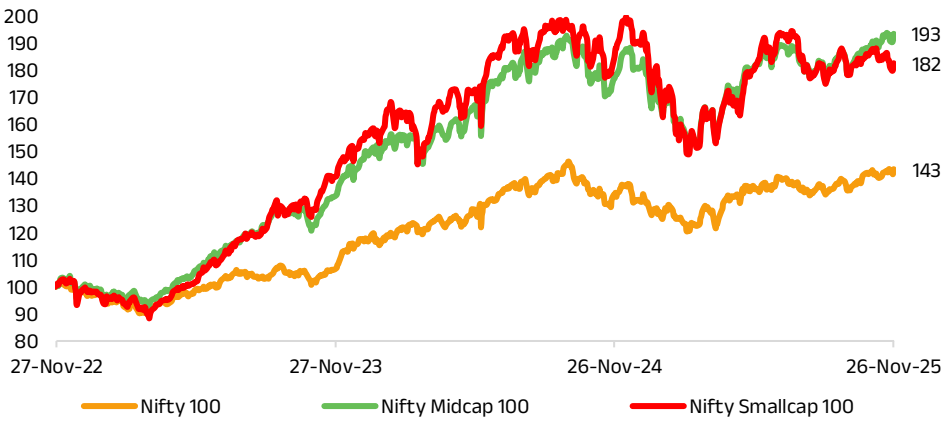


Broad Indices Historical Movement



Source: NSE

Broad Indices

	26-Nov-25	1 Day	1 Week	1 Month
Nifty 50	26,205.30	1.24%	0.59%	1.59%
Nifty 100	26,743.05	1.28%	0.38%	1.29%
Nifty 200	14,582.50	1.28%	0.35%	1.61%
Nifty 500	23,955.20	1.27%	0.20%	1.13%
Nifty Large Midcap 250	16,925.75	1.28%	0.20%	1.85%
Nifty Midcap 150	22,419.10	1.28%	0.02%	2.41%
Nifty Next 50	69,189.40	1.49%	-0.64%	-0.24%
Nifty Smallcap 250	16,829.80	1.18%	-0.71%	-2.26%

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

Smart Beta Index

Index	26-Nov-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	32,153.05	1.45%	0.58%	1.48%
NIFTY 500 Value 50	15,067.55	1.46%	-0.54%	2.27%
Nifty 200 Quality 30	21,356.60	1.15%	-0.29%	0.95%
Nifty 50 Equal Weight	33,320.35	1.27%	0.54%	1.16%
NIFTY Alpha Low Volatility 30	27,101.60	1.27%	0.65%	0.14%
Nifty High Beta 50	3,972.65	1.90%	-0.32%	1.79%
Nifty Low Volatility 50	25,780.80	1.09%	0.68%	0.87%
Nifty Midcap150 Momentum 50	63,677.40	1.41%	0.21%	3.50%
Nifty PSE	9,840.60	1.35%	-1.20%	-0.68%
Nifty SME Emerge	15,211.80	0.70%	-1.86%	-1.65%
Nifty 100 ESG	5,183.70	1.22%	0.35%	2.14%

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

Sector Indices

Index	26-Nov-25	1 Day	1 Week	1 Month
Nifty Auto	27,696.40	1.16%	0.95%	2.17%
Nifty Bank	59,528.05	1.20%	0.53%	3.17%
Nifty Consumption	12,497.90	0.75%	0.13%	-0.18%
Nifty Financial	27,799.50	1.42%	0.56%	1.48%
Nifty FMCG	55,442.60	0.71%	0.11%	-1.61%
Nifty Healthcare	14,967.10	1.13%	0.48%	0.70%
Nifty IT	37,364.60	1.46%	0.86%	3.83%
Nifty Media	1,448.05	1.62%	-2.05%	-5.98%
Nifty Metal	10,280.70	2.06%	-1.00%	-0.65%
Nifty MNC	30,310.75	1.29%	0.34%	0.46%
Nifty Pharma	22,862.35	1.20%	0.59%	2.26%
Nifty Realty	911.45	1.12%	-1.36%	-3.13%
Nifty Energy	35,964.80	1.74%	-0.46%	0.95%

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

Nifty 50 Top 5 Gainers

Company	26-Nov-25	Prev_Day	% Change	1 Week
JSW Steel	1,154.40	1,112.00	3.81	-0.90
BPCL	367.65	355.85	3.32	0.55
HDFC Standard Life Insurance C	787.55	766.55	2.74	3.48
Grasim Indus	2,744.00	2,686.80	2.13	-0.03
Coal India	377.35	370.05	1.97	-0.45

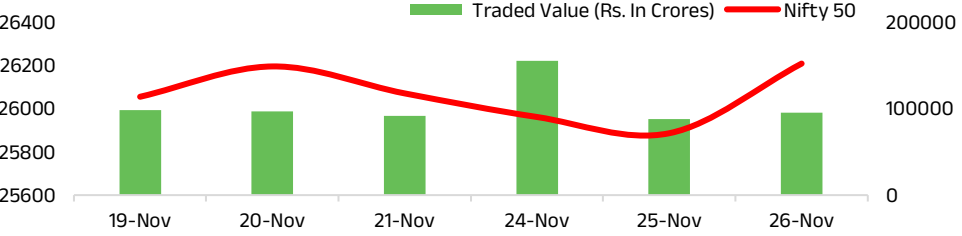
Source: NSE

Nifty 50 Top 5 Losers

Company	26-Nov-25	Prev_Day	% Change	1 Week
Bharti Airtel	2,126.80	2162	-1.61	-1.53
Eicher Motors Limited	7,198.50	7219	-0.28	4.38
SBI Life Insurance Comp	2,029.10	2031	-0.09	1.21
Asian Paints	2,874.00	2876	-0.06	-0.68
NA	NA	NA	NA	NA

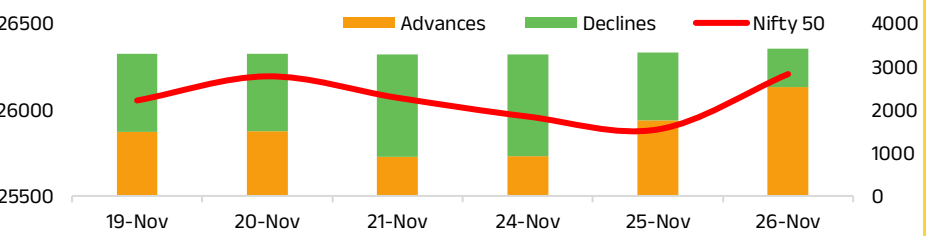
Source: NSE

Nifty 50 vs NSE Trading Volume




Source: NSE


Nifty 50 vs Advances & Declines



Source: NSE




Indian equity markets advanced with broad-based buying, supported by weak U.S. economic data that strengthened expectations of a U.S. Federal Reserve rate cut in Dec 2025. Sentiment was further lifted by foreign institutional inflows, adding to the positive momentum.



According to a status report filed with the National Company Law Appellate Tribunal (NCLAT), IL&FS Group has repaid Rs. 48,463 crore to lenders as of Sep 2025, reaching nearly 80% of its Rs. 61,000 crore debt resolution target. The repayments were achieved through asset monetisation, interim distributions including cash and InvIT units, and other mechanisms.

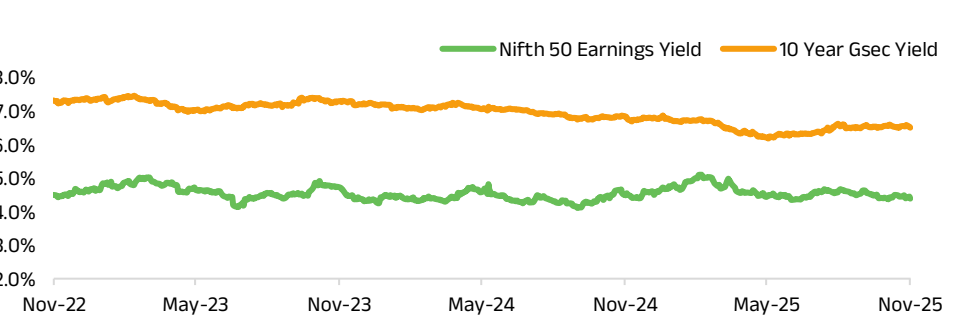


Zydus Lifesciences has signed an exclusive licensing and commercialisation agreement with US-based RK Pharma for a new sterile injectable oncology supportive care product for the US market. Under the deal, RK Pharma will manufacture and supply the product, while Zydus will handle NDA submission and commercialisation. The product, aimed at reducing dosing errors and improving compliance, is expected to be filed in 2026. Zydus cited an estimated US market opportunity of 6.2 million units.



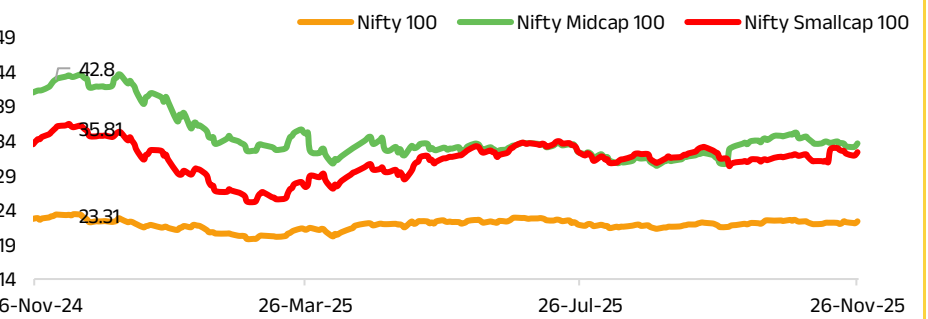
PepsiCo India has introduced Red Rock Deli, a gourmet chips brand, to the Indian market. Originating from Australia, the brand offers exotic globally inspired flavours made in India using sunflower oil and advanced cooking technologies including Kettle Cooked, Baked and Popped. The launch targets urban consumers seeking premium chef-inspired snacks, with availability on leading quick commerce platforms.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



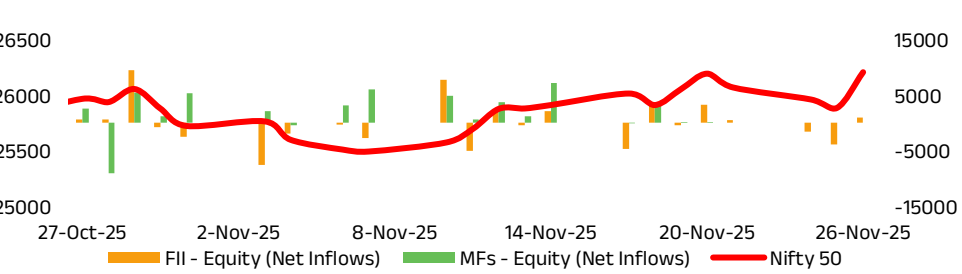
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.				
Description	Net	MTD	QTD	YTD
FII	974.53	-8,282	6,329	-148,190
MF**	110.08	31,909	52,628	447,690
DII	6247.93	68,994	122,395	691,982

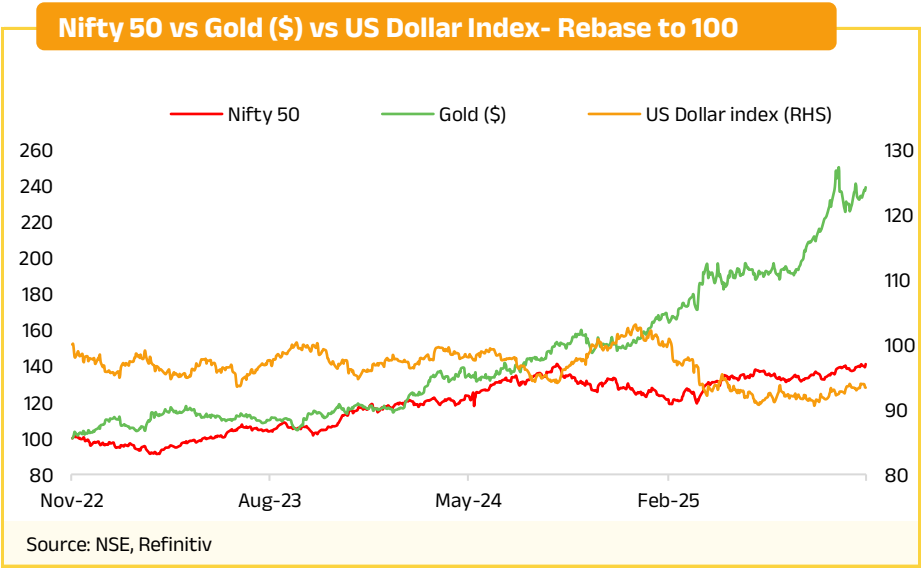
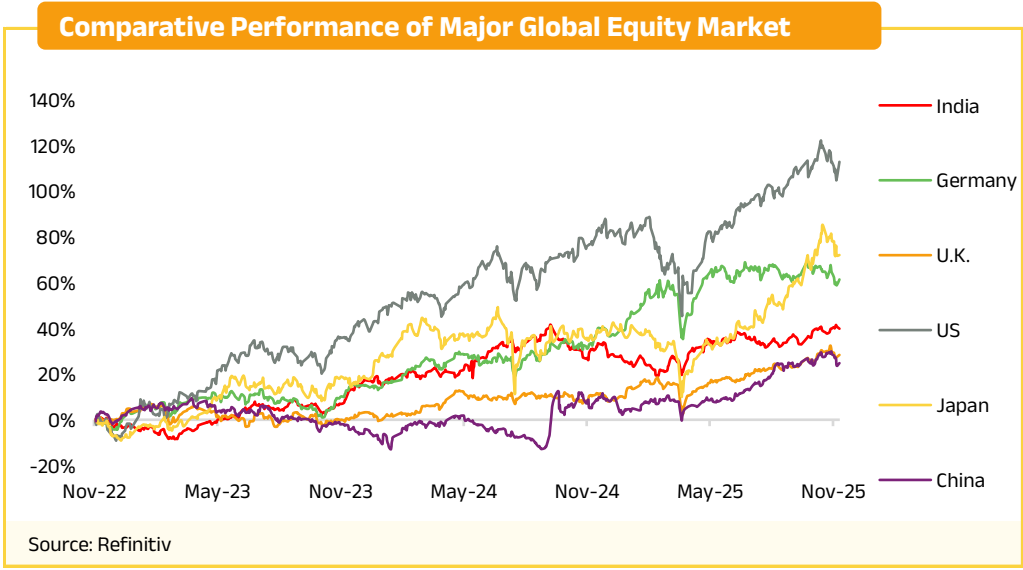
Source: SEBI, NSDL;\*\*As on 20th Nov 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	26381.20	25886.80	1.91%
Near Basis	175.90	2.00	8695.00%
Mid Futures	26527.30	26055.40	1.81%
Mid Basis	322.00	170.60	88.75%
Near Open Interest (Cr.)	1.40	0.66	111.89%
Mid Open Interest (Cr.)	0.09	1.37	-93.65%
Rollover (%)	6.20	68.77	-90.98%
Put Call Ratio (OI)	1.45	0.82	76.13%
Put Call Ratio(Vol)	0.84	0.94	-10.40%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	8015	10379	26645
Index Options	4542338	4535472	321118
Stock Futures	34500	34367	385989
Stock Options	13449	13896	6271
Total	4598302	4594114	740022
Source: NSE			

Global Equity Market				
Global Indices	26-Nov-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3716.18	0.69%	2.66%	0.14%
Nasdaq 100 (U.S.)	25236.94	0.87%	2.42%	-0.48%
FTSE (U.K.)	9691.58	0.85%	1.94%	0.48%
DAX Index (Germany)	23726.22	1.11%	2.43%	-2.12%
CAC 40 Index (France)	8096.43	0.88%	1.79%	-1.57%
SSE Composite (China)	3864.18	-0.15%	-2.09%	-2.18%
Nikkei (Japan)	49559.07	1.85%	2.10%	0.53%
Kospi (South Korea)	3960.87	2.67%	0.80%	0.49%
HangSeng (Hong Kong)	25928.08	0.13%	0.38%	-0.89%
Strait Times (Singapore)	4501.56	0.36%	-0.08%	1.79%
Ibovespa Sao Paulo (Brazil)	158554.94	1.70%	2.04%	8.47%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8606.50	0.81%	1.88%	-4.57%
Jakarta Composite (Indonesia)	8602.13	0.94%	2.33%	3.99%
KLSE (Malaysia)	1624.50	0.79%	0.04%	0.70%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	26-Nov-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	125,665	0.78%	1.79%	-0.94%
Gold (\$/oz)	4,163.99	0.82%	2.04%	1.28%
Silver (INR/1 kg)	158,746	1.80%	0.43%	0.06%
Silver (\$/oz)	53.35	3.78%	3.87%	9.78%
Brent Crude(\$/bbl)	64.71	0.50%	1.62%	-2.50%
Crude Oil (INR/1 bbl)	5,170.00	-1.49%	-3.97%	-4.86%
NYMEX Crude(\$/bbl)	58.71	0.96%	-2.43%	-5.57%
Natural Gas (INR/1 mmbtu)	399.80	-1.45%	3.20%	35.94%
Aluminium (INR/1 kg)	270.35	0.65%	2.31%	1.31%
Copper (INR/1 kg)	1,020.00	0.54%	2.24%	2.27%
Nickel (INR/1 kg)	1,329.20	0.21%	1.40%	-1.85%
Lead (INR/1 kg)	182.30	-1.83%	-2.77%	-0.30%
Zinc (INR/1 kg)	313.10	0.47%	0.47%	3.06%
Mentha Oil (INR/1 kg)	1,013.70	-0.13%	0.25%	1.27%
Baltic Dry Index	2,401	3.98%	6.24%	20.59%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Shareholder Activism

Definition: Shareholder activism refers to actions taken by investors to influence a **company's** decisions, policies, or governance to improve performance or align with certain value



Explanation

Activists may push for changes like board restructuring, cost-cutting, or sustainability initiatives. They use tools such as voting rights, public campaigns, or direct engagement with management. For example, if Company X underperforms, activist investors might demand operational changes or divestment of non-core assets. While activism can unlock value and improve governance, it may also lead to short-term pressures or conflicts with management. Institutional investors often monitor activism trends as they can impact stock prices and corporate strategy.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.16	4.74	6.21	14.46
Flexi Cap Fund	0.63	5.15	4.14	16.17
Mid Cap Fund	1.31	6.99	5.05	21.68
Large & Mid Cap Fund	0.99	5.67	5.43	18.23
Small Cap Fund	-0.51	4.16	-0.71	19.50
Multi Cap Fund	0.78	5.49	4.27	18.74
Focused Fund	0.78	4.95	4.60	15.68
Value Fund	1.37	5.07	4.13	18.63
Contra Fund	0.98	5.30	4.46	19.75
ELSS	0.81	4.90	4.41	16.97
Equity Savings	0.68	3.87	6.72	9.92
Arbitrage Fund	0.50	2.87	6.20	6.89
Dividend Yield Fund	0.55	4.26	3.11	18.74
Aggressive Hybrid Fund	0.71	4.33	5.91	14.21
Balanced Advantage	0.87	3.83	5.61	11.84
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.				