END DAY COMMENTARY

17th NOV 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,104.79	82,150.62	82,897.49	82,091.90	82,532.19	+ 427.40	+0.52
NIFTY	25,291.10	25,277.30	25,501.35	25,267.30	25,387.40	+96.30	+0.38

INDICES ENDED THE DAY ON A POSITIVE NOTE

The 30-share BSE Sensex was up by 427.40 points or 0.52% to settle at 82,532.19 and the Nifty was up by 96.30 points or 0.38% to settle at 25,387.40. The BSE Small Cap 250 remained flat by 0.00% and BSE 500 was up by 0.38%. On the sectoral front, Auto, Healthcare, Metal, Oil & Gas, Banks, Realty and Consumer Durables were the gaining indices. On the flip side, FMCG, IT and Capital Goods were the losing indices. Axis Bank, Reliance, State Bank of India, TCS and Adani Ports were the top gainers on the Sensex; on the flip side, HCL Tech, Power Grid, Tech Mahindra, Infosys, and Trent were the top losers on the Sensex. On global front, Asian markets shut the day on a negative note and European indices are trading on a green note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ADANIENT	2,745.1	2,659.0	3.24
EICHERMOT	7,828.0	7,599.0	3.01
MAXHEALTH	1,030.9	1,009.9	2.08
ASIANPAINT	2,625.0	2,572.9	2.02
AXISBANK	1,369.0	1,342.4	1.98

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HCLTECH	1,355.7	1,384.6	-2.09
POWERGRID	258.00	262.20	-1.60
HDFCLIFE	595.05	604.50	-1.56
ONGC	223.52	226.99	-1.53
COALINDIA	391.55	397.50	-1.50

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	34909357	814.95	2848.4
BSE	7214012	3,864.9	2835.7
ICICIBANK	15285455	1,598.7	2449.4
RELIANCE	15905595	1,367.0	2158.3
SBIN	16311218	1,108.6	1806.2

Most Active (by volume)

Name	Qty	Pr.	Value CR
HDFCBANK	34909357	814.95	2848.4
ETERNAL	30484971	375.05	1141.4
COALINDIA	25494480	391.55	996.85
TATASTEEL	20645185	181.50	375.88
TMPV	18846627	259.20	495.25

Indian equity benchmarks ended higher for the second straight day on Tuesday, as sustained foreign fund inflows and falling crude oil prices supported sentiment, helping domestic markets withstand weakness across global exchanges. Foreign Institutional Investors (FIIs) extended their net-buying streak in Indian equities on Monday, purchasing shares worth a net Rs 4,864.68 crore.

ICRA sees India's Q2 GDP growth slowing to five-quarter low of 7.5%: Amid external headwinds and a sub-par monsoon, rating agency Icra has estimated that India's Gross Domestic Product (GDP) growth will slow to a five-quarter low of 7.5% in the July-September quarter (Q2) of fiscal year 2026-27 (FY27).

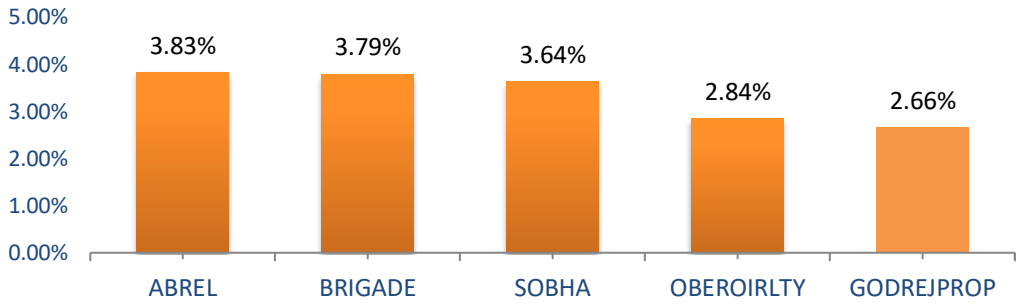
Global front: European markets were trading lower following reports that the United States is preparing to tighten restrictions on China's access to advanced artificial intelligence chips. Asian markets settle mostly lower as investors rotated from AI stocks and sought direction on the Federal Reserve's interest rate path.

Source- AceEquity

NEWS BULLETIN

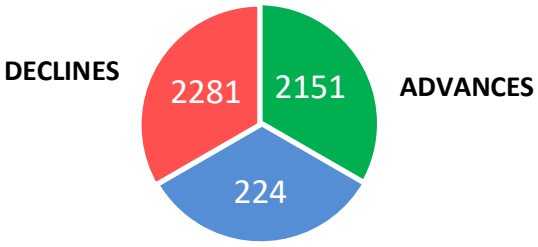
- **Power Grid** Corporation of India has approved investment of Rs 220.09 crore for reconductoring of Gooty - Tumkur (Pavagada) 400kV D/c line with HTLS conductor. The project is scheduled to be commissioned by June 10, 2028.
- **Hindustan Zinc's** Board has approved the investment of Rs 80,000 crore (includes earlier approved phase-1 and the new zinc & lead smelters, silver refinery along with required mine and milling expansion) to double metal production.
- **Mahindra & Mahindra's (M&M)** subsidiary - Mahindra Last Mile Mobility has entered into partnership with Uber to support the adoption of 5000 Mahindra electric three-wheelers over the next 12 months.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 7,224.59
CHANGE: + 132.15
CHANGE: +1.86%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.07	20.68

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