END DAY COMMENTARY

18th NOV 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,532.19	82,376.56	82,578.87	81,780.47	82,031.81	-500.38	-0.61
NIFTY	25,387.40	25,323.15	25,390.80	25,141.80	25,227.95	-159.45	-0.63

INDICES ENDED THE DAY ON A LOWER NOTE

The 30-share BSE Sensex was down by 500.38 points or 0.61% to settle at 82,031.81 and the Nifty was down by 159.45 points or 0.63% to settle at 25,227.95. The BSE Small Cap 250 was down by by 0.63% and BSE 500 was down by 0.80%. On the sectoral front, only Healthcare was the gaining index. On the flip side, Auto, Metal, Oil & Gas, Banks, Realty, Consumer Durables, FMCG, IT and Capital Goods were the losing indices. State Bank of India, ITC, Ultratech Cement, Power Grid and Maruti were the top gainers on the Sensex; on the flip side, Titan, TCS, Bajaj Finance, Eternal, and Indigo 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 mixed note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SBIN	1,135.0	1,108.6	2.38
CIPLA	1,417.0	1,388.0	2.09
TATACONSUM	1,130.9	1,112.4	1.66
APOLLOHOSP	8,821.0	8,712.5	1.25
ITC	296.60	293.30	1.13

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TITAN	4,648.1	4,908.0	-5.30
HDFCLIFE	575.50	595.05	-3.29
HINDALCO	900.00	927.75	-2.99
BSE	3,755.7	3,864.9	-2.83
TMPV	252.55	259.20	-2.57

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
SBIN	35420675	1,135.0	3983.2
RELIANCE	18228940	1,363.0	2484.9
HDFCBANK	21579720	808.15	1748.6
ICICIBANK	10778116	1,601.3	1724.5
BSE	4421992	3,755.7	1688.3

Most Active (by volume)

Name	Qty	Pr.	Value CR
SBIN	35420675	1,135.0	3983.2
KOTAKBANK	27152458	494.85	1348.6
HDFCBANK	21579720	808.15	1748.6
RELIANCE	18228940	1,363.0	2484.9
TATASTEEL	17340892	179.00	311.71

Indian equity markets snapped a two-day winning streak on Wednesday, with both the Sensex and Nifty closing more than half a percent lower, amid weak global cues driven by concerns over the artificial intelligence trade and expectations of a more aggressive monetary tightening stance by the U.S. Federal Reserve. Investors booked profits after the recent rally, while broad-based selling in heavyweight stocks, particularly Titan Company, Tata Consultancy Services and HDFC Life Insurance, further weighed on the markets.

India, other Asia-Pacific nations expected to maintain strong banking regulations: Traders took note of a report that Moody's Ratings has said that India and other major Asia-Pacific economies, including Australia, China, Japan, South Korea, Hong Kong SAR and Singapore, are likely to maintain strong prudential supervision and conservative liquidity management.

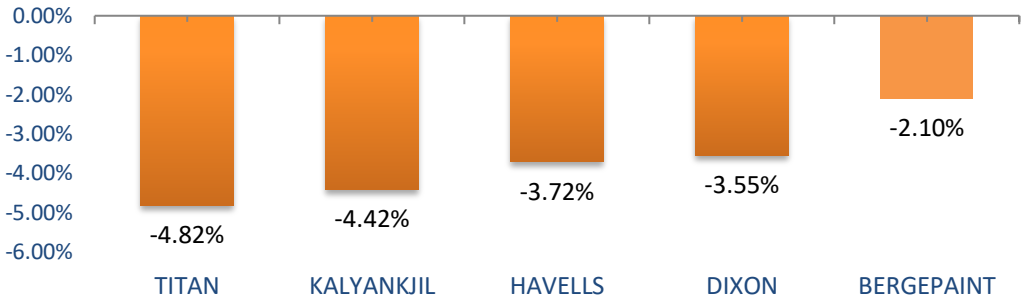
On the global front: European stocks were trading mostly higher as investors await the release of minutes from the Federal Open Market Committee's October meeting later in the day for clues. Asian markets traded mixed following the broadly negative cues from Wall Street overnight.

Source- AceEquity

NEWS BULLETIN

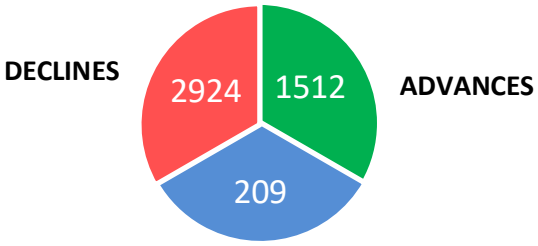
- **Poonawalla Fincorp** has raised Rs 600 crore through the allotment of 60,000 zero coupon, secured, redeemable, rated, listed, non-convertible debentures having a face value of Rs 1,00,000. The Debentures would be listed in Debt Market Segment of the BSE.
- **Adani Cement** has flagged off heavy-duty electric trucks for clinker & cement transport at its Sanghi Plant in Gujarat. This is the first-ever deployment of EV trucks by the company.
- **Dhabriya Polywood** has received the work order from Godrej Group for Aluminum Door & Window Works for a value of Rs 12.20 Crore (including GST). The project is scheduled to be completed by 17 months, in various tranches as per the terms of the order.

MARKET DRIVING SECTOR : CONSUMER DURABLES



S&P BSE: CONSUMER DURABLES
CLOSING: 60,677.75
CHANGE: -1,966.83
CHANGE: -3.14%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.94	20.55

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