END DAY COMMENTARY

19th NOV 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	82,031.81	82,074.16	83,043.87	81,698.63	83,021.75	+989.94	+1.21
NIFTY	25,227.95	25,186.80	25,514.30	25,104.80	25,514.30	+286.35	+1.14

INDICES ENDED THE DAY ON A HIGHER NOTE

The 30-share BSE Sensex was up by 989.94 points or 1.21% to settle at 83,021.75 and the Nifty was up by 286.35 points or 1.14% to settle at 25,514.30. The BSE Small Cap 250 was up by 0.77% and BSE 500 was up by 1.16%. On the sectoral front, Healthcare, Auto, Metal, Oil & Gas, Banks, Realty, Consumer Durables, FMCG and Capital Goods were the gaining indices. On the flip side, IT was the only losing index. Maruti, Mahindra & Mahindra, Axis Bank, Hindustan Unilever and Bharat Electronics were the top gainers on the Sensex; on the flip side, Infosys, TCS, Tech Mahindra, HCL Tech, and Indigo were the top losers on the Sensex. On global front, Asian markets shut the day on a red note and European indices are trading on a mixed note.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
MARUTI	13,589	12,632	7.58
EICHERMOT	8,058.5	7,700.0	4.66
M&M	3,509.0	3,359.1	4.46
TMPV	263.50	252.55	4.34
HINDUNILVR	2,074.2	1,993.0	4.07

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TCS	2,342.7	2,379.5	-1.55
TECHM	1,723.0	1,750.0	-1.54
INFY	1,091.9	1,108.8	-1.52
APOLLOHOSP	8,738.0	8,821.0	-0.94
HCLTECH	1,332.9	1,344.7	-0.88

MARKET STATS (NSE)

Most Active (by value)

Name	Qty	Pr.	Value CR
SBIN	26528803	1,156.0	3044.8
RELIANCE	14486599	1,375.6	1981.9
HDFCBANK	24089874	821.80	1962.6
MARUTI	1371819	13,589	1832.5
ICICIBANK	11223667	1,608.90	1794.1

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	31315542	366.85	1132.1
SBIN	26528803	1,156.0	3044.8
ITC	26512159	301.00	794.70
HDFCBANK	24089874	821.80	1962.6
TMPV	22086529	263.50	575.68

Indian equity markets erased their initial losses and ended significantly higher on Thursday, with both the Sensex and Nifty surging by over one percent, led by strong buying interest in heavyweight automobile, FMCG and banking stocks, with Maruti Suzuki India emerging as the top gainer. Sentiments got boost with sustained foreign fund inflows, with foreign institutional investors (FIIs) extending their buying streak to a seventh consecutive session on November 18, purchasing equities worth Rs 5,866 crore.

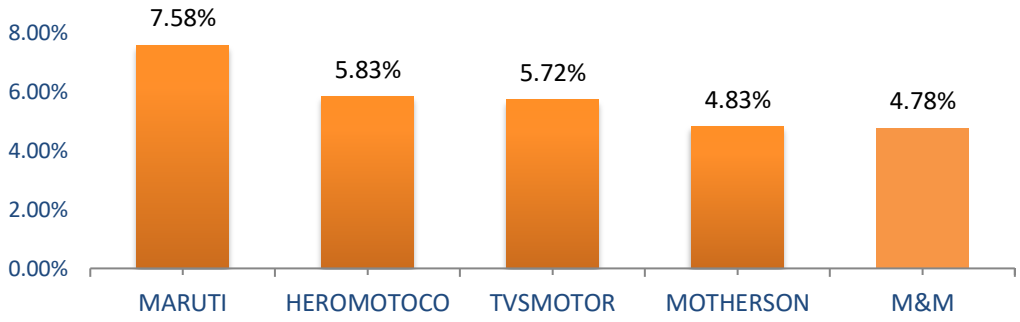
India on track to achieve $1 trillion exports target in FY27: Traders took support with Commerce Secretary Rajesh Agrawal's statement that the country is on track to achieve the $1 trillion exports (of goods and services) target in current fiscal year (FY27), with its exports recording a 16.6 per cent increase in April-September period.

On the global front: European stocks were trading mostly higher as technology stocks led the broader recovery as investor appetite for risk improved ahead of Anthropic's Wall Street debut. Asian markets traded mixed as investors weighed a sharp selloff in commodities, AI-related financial risks and hawkish Fed signals. Source- AceEquity

NEWS BULLETIN

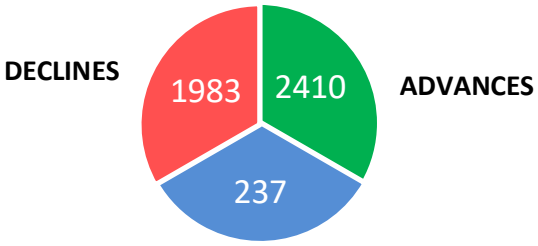
- **Adani Energy Solutions (AESL)** has won a transmission project for evacuation of power from the upcoming 2400 MW power plant in Pirpainti, Bihar. The project, won through the Tariff Based Competitive Bidding (TBCB) mechanism, will provide annual tariff of Rs 500 crore once commissioned.
- **Jio Financial Services** (JFSL) and BlackRock have each subscribed to and been allotted 12,30,00,000 equity shares of face value Rs 10 each of Jio BlackRock Asset Management
- **Tonbo** Imaging India has received an order worth around Rs 35.62 crore (inclusive of taxes) from the Ministry of Defence, Government of India, for the supply of its clip-on thermal weapon sights and associated support equipment.

MARKET DRIVING SECTOR : AUTO



S&P BSE: AUTO
CLOSING: 62,870.87
CHANGE: +2,405.94
CHANGE: +3.98%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.35	20.78

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