END DAY COMMENTARY

4th November 2025

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	83,978.49	84,000.64	84,068.01	83,412.77	83,459.15	-519.34	-0.62
NIFTY	25,763.35	25,744.75	25,787.40	25,578.40	25,597.65	-165.70	-0.64

INDICES ENDED ON A NEGATIVE NOTE

The 30-share BSE Sensex was down by 519.34 points or 0.62% to settle at 83,459.15 and the Nifty was down by 165.70 points or 0.64% to settle at 25,597.65. The BSE Mid-Cap was down by 0.26% and BSE Small Cap was down by 0.69%. On the sectorial front, Consumer Durables was gaining indice; on the flip side, Capital Goods, Auto, Bank, Oil & Gas, Realty, Metal, Healthcare, IT and FMCG, were losing indices. Titan, Bharti Airtel, Bajaj Finance, M&M and SBIN were the top gainers on the Sensex; on the flip side, Powergrid, Eternal, TMPV, Tata Steel and Maruti 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 red note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TITAN	3,810.0	3,724.5	2.30
BHARTIARTL	2,110.0	2,074.0	1.74
BAJFINANCE	1,054.7	1,043.1	1.11
M&M	3,584.3	3,548.9	1.00
HDFCLIFE	742.80	736.00	0.92

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
POWERGRID	278.80	288.00	-3.19
ETERNAL	313.50	322.60	-2.82
ADANIENT	2,399.9	2,467.0	-2.72
TMPV	407.00	417.00	-2.40
HINDALCO	830.85	847.20	-1.93

Most Active (by value)

Name	Qty	Pr.	Value CR
BHARTIARTL	1,22,63,078	2,110.0	2,597.7
ICICIBANK	1,52,11,183	1,336.9	2,034.4
HDFCBANK	2,00,24,544	985.70	1,982.8
SBIN	1,91,54,518	954.60	1,822.0
RELIANCE	1,00,07,806	1,471.1	1,482.1

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	3,54,02,202	313.50	1,115.5
POWERGRID	2,60,98,629	278.80	730.42
HDFCBANK	2,00,24,544	985.70	1,982.8
SBIN	1,91,54,518	954.60	1,822.0
TATASTEEL	1,87,46,387	179.35	337.83

Indian equity benchmarks ended in negative terrain with significant losses on weekly F&O expiry, weighed down by continued selling from foreign institutional investors (FIIs). After making a cautious start, soon indices slipped into red, as traders remained cautious amid uncertainties surrounding over the U.S. Federal Reserve's future rate-cut and lack of clarity on ongoing US-India trade discussions. In the final hour, intensified selling pressure dragged markets near day's low points, with profit booking seen across key sectors.

India-EU FTA discussions intensify as EU negotiators arrive in New Delhi: Traders took a note of reports that a senior team of negotiators from the European Union (EU) is in New Delhi from November 3, 2025 to 7, 2025 for negotiations with Indian counterparts on the proposed India-EU Free Trade Agreement (FTA).

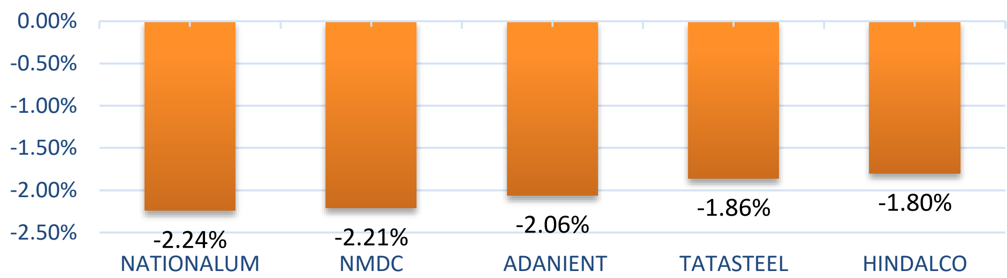
Global front: European markets were trading in red, while Asian markets ending in red as weak U.S. manufacturing data and cautious comments from Federal Reserve officials over the path of interest rates soured investors' appetite for riskier assets.

Source: AceEquity

NEWS BULLETIN

- **Indian Metals & Ferro Alloys** has signed definitive agreements to acquire **Tata Steel's** ferro chrome plant in Kalinganagar, Odisha. The asset transfer agreement will add 99 MVA furnace capacity for a base purchase consideration of Rs 610 crore.
- **Cipla** has entered into definitive agreements to acquire 100% stake in Inzpera Healthsciences (Inzpera). The company will pay a consideration of around Rs 110.65 crore for acquisition of equity shares and non-convertible redeemable preference shares, representing 100% of Inzpera's shareholding.
- **Bharti Airtel** has received approval for acquisition of upto 5% additional stake in **Indus Towers.**

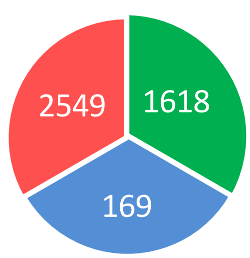
MARKET DRIVING SECTOR : METAL



NIFTY METAL
CLOSING: 34,764.12
CHANGE: -493.26
CHANGE: -1.40%

MARKET BREADTH – NEGATIVE

DECLINES



ADVANCES

NO CHANGE

RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.75	22.49

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