

17<sup>th</sup> NOV 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,562.78	84,700.50	84,988.09	84,581.08	84,950.95	+388.17	+0.46
NIFTY	25,910.05	25,948.20	26,024.20	25,906.35	26,013.45	+103.40	+0.40

## INDEX RECLAIM 26K 😊

The 30-share BSE Sensex was up by 388.17 points or 0.46% to settle at 84,950.95 and the Nifty was up by 103.40 points or 0.40% to settle at 26,013.45. The BSE Mid-Cap was up by 0.66% and BSE Small Cap was up by 0.59%. On the sectoral front, Auto, Metal, IT, Consumer Durables, FMCG, Banks, Healthcare, Oil & Gas, Capital Goods and Realty were gaining indices. On the flip side, there were no losing index. Eternal, Maruti, Kotak Bank, Mahindra & Mahindra and Tech Mahindra were the top gainers on the Sensex; on the flip side, TMPV, Ultratech Cement, Asian Paint, BEL and Tata Steel were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a negative note.

## Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
ETERNAL	309.60	303.75	1.93
TATACONSUM	1,179.00	1,157.80	1.83
MAXHEALTH	1,122.20	1,103.10	1.73
EICHERMOT	6,809.00	6,695.00	1.70
MARUTI	15,889.00	15,684.00	1.31

## Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
TMPV	372.65	391.20	-4.74
ULTRACEMCO	11,775.00	11,874.00	-0.83
JIOFIN	312.45	314.90	-0.78
ASIANPAINT	2,885.40	2,906.40	-0.72
HDFCLIFE	768.30	773.70	-0.70

## MARKET STATS (NSE)

## Most Active (by value)

Name	Qty	Pr.	Value CR
HDFCBANK	1,83,96,408	996.45	1,828.36
BHARTIARTL	59,98,770	2,111.30	1,267.63
TMPV	3,23,93,346	372.65	1,207.75
INFY	79,10,354	1,507.00	1,188.42
KOTAKBANK	50,30,328	2,103.00	1,058.36

## Most Active (by volume)

Name	Qty	Pr.	Value CR
TMPV	3,23,93,346	372.65	1,207.7
TATASTEEL	2,82,04,282	173.40	488.95
ETERNAL	2,66,32,684	309.60	815.81
HDFCBANK	1,83,96,408	996.45	1,828.3
BEL	1,29,96,079	424.90	552.27



Indian markets ended near day's high levels on Monday as traders preferred to buy fundamental strong stocks during the session. Markets made positive start and further continued their trade in green amid optimism over potential India-US trade deal. Traders kept close eye towards Federal Reserve meeting minutes, which going to out on November 20. In second half of the session, markets added more points and touched day's highs. With an aim to support exporter amid high US tariffs, RBI has permitted exporters to bring proceeds of their shipments in 15 months as against the prevailing timeframe of 9 months. The changes have been made following amendments to the Foreign Exchange Management (Export of Goods & Services) Regulations.

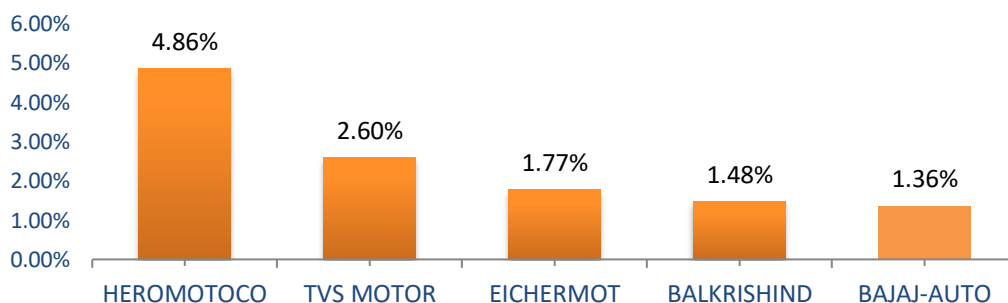
On Global front, European equity markets were trading lower, due to concerns about an artificial intelligence bubble and global growth. Asian markets ended mixed despite Japan's industrial production expanded more than initially estimated in September. Industrial production climbed 2.6 percent month-on-month in September, reversing a 1.5 percent fall in August. In the initial estimate, industrial output showed an increase of 2.2 percent.

Source: Ace Equity

## NWS BULLETIN

- **KEC International** has secured new orders worth Rs 1016 crore across various businesses. The company's Civil business has secured orders in the Buildings & Factories (B&F) segment from existing clients.
- **Pace Digitek** has secured an order worth around Rs 929.76 crore (including taxes) from Maharashtra State Power Generation Company (MSPGCL).
- **ACME Solar** Holdings' subsidiary--ACME Aklera Power Technology has secured an award of Rs 47.40 crore as change in law compensation by the Rajasthan Electricity Regulatory Commission (RERC). As a result of the ruling, the 250 MW solar project.
- **Siemens** has reported 45.84% fall in its net profit at Rs 419.60 crore for the quarter ended September 30, 2025 as compared to Rs 774.70 crore for the same quarter in the previous year.

## MARKET DRIVING SECTOR : AUTO



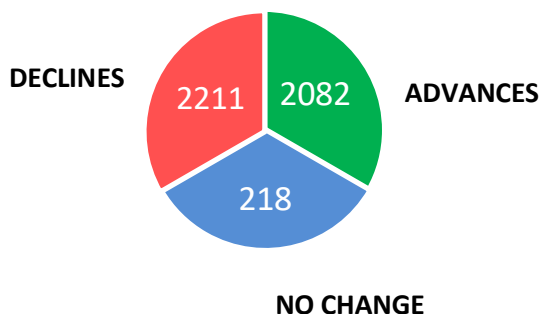
**S&P BSE: AUTO**

**CLOSING: 61,245.84**

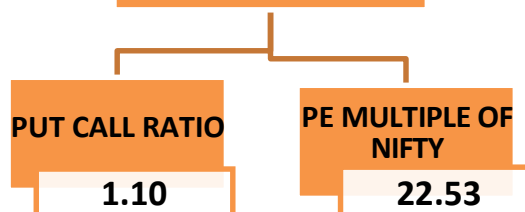
**CHANGE: + 525.21**

**CHANGE: + 0.86%**

## MARKET BREADTH – NEGATIVE



## RATIO ANALYSIS



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