

25th NOV 2025

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,900.71	85,008.93	85,110.24	84,536.73	84,587.01	-313.70	-0.37
NIFTY	25,959.50	25,998.50	26,032.60	25,857.50	25,884.80	-74.70	-0.29

HIGHLY VOLATILE DAY END WITH MINOR LOSS

The 30-share BSE Sensex was down by 313.70 points or 0.37% to settle at 84,587.01 and the Nifty was down by 74.70 points or 0.29% to settle at 25,884.80. The BSE Mid-Cap was up by 0.19% and BSE Small Cap was up by 0.20%. On the sectoral front, Metal, Realty, Capital Goods and Healthcare were gaining indices. On the flip side, IT, FMCG, Oil & Gas, Banks, Consumer Durables, and Auto were losing indices. BEL, SBIN, Tata Steel, Eternal and Bharti Airtel were the top gainers on the Sensex; on the flip side, TMPV, Trent, Infosys, Powergrid and HDFC Bank 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 positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
BEL	410.20	403.80	1.58
HINDALCO	785.80	774.65	1.44
SBIN	983.50	970.60	1.33
SHRIRAMFIN	838.60	828.20	1.26
DRREDDY	1,236.00	1,226.20	0.80

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
ADANIEN	2,329.40	2,399.20	-2.91
TMPV	352.60	358.30	-1.59
TRENT	4,246.50	4,310.90	-1.49
INFY	1,530.20	1,548.00	-1.15
POWERGRID	272.65	275.80	-1.14

MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,49,89,383	989.45	2,486.64
RELIANCE	1,50,33,482	1,540.00	2,324.69
ICICIBANK	1,22,35,000	1,356.90	1,666.69
BHARTIARTL	71,02,592	2,156.60	1,534.02
INFY	81,07,952	1,530.20	1,242.17

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	2,49,89,383	989.45	2,486.6
TATASTEEL	1,99,83,310	166.16	332.28
ETERNAL	1,93,04,127	302.40	583.87
RELIANCE	1,50,33,482	1,540.00	2,324.6
BEL	1,41,07,503	410.20	577.96



Indian equity benchmarks ended in negative territory amid monthly F&O expiry. After making a cautious start, soon indices turned volatile, weighed down by heavy selling in IT and Media stocks. However, markets moved into positive territory during the afternoon session, as traders took some support after India Ratings and Research raised India's GDP growth projection for the current fiscal to 7%. Last hours of trade, profit booking at higher level dragged markets near day's low points. Investors took note of report that Reserve Bank of India (RBI) in its November monthly bulletin has said that global uncertainty remains elevated, although October witnessed a slight pullback after more than a year of continuous increase. Traders overlooked report that India Ratings and Research (Ind-Ra) raised India's GDP growth projection for the current fiscal to 7 per cent on the back of high growth in the June quarter and less impact of the US tariff hike on global growth and trade.

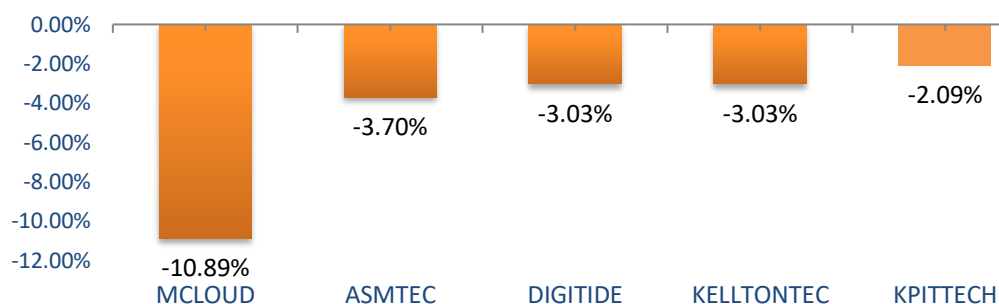
On Global front: European markets were trading mostly in green as investors awaited a slew of U.S. economic data for fresh insights into the economic and rate outlook. Asian markets ended mostly in green after U.S. President Donald Trump announced an April visit to China at Xi Jinping's invitation following a productive phone call.

Source: Ace Equity

NEWS BULLETIN

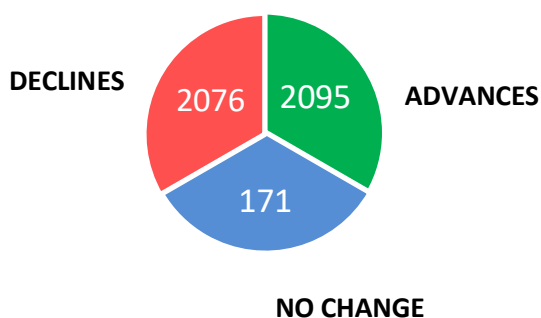
- **Zen Technologies** has received an order from Ministry of Defence, Government of India, valued at around Rs 108 crore (including GST) for supply of simulators. The order will be executed within a year.
- **Avantel** has received a purchase order worth of Rs 17.55 crore (Including Taxes) from Bharat Electronics on November 25, 2025. The order is for the supply of communication systems. The order is to be executed by March 2026.
- **Artson** has received a purchase order worth Rs 6.47 crore including taxes from Tata Projects (TPL) for supply of finished structures. The order is to be executed within 4 months.

MARKET DRIVING SECTOR : IT



S&P BSE: IT
CLOSING: 35,730.16
CHANGE: - 268.69
CHANGE: - 0.75%

MARKET BREADTH – POSITIVE



RATIO ANALYSIS



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