AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

10th November 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,492.30	**-17.4**	**-0.07**	**-1.05**	**7.37**
BSE Sensex	83,216.28	**-94.73**	**-0.11**	**-0.91**	**6.00**
Bank Nifty	57,876.80	**322.55**	**0.56**	**-0.39**	**13.35**
Nifty Midcap 100	59,843.15	**374.55**	**0.63**	**-0.74**	**4.16**
Nifty Smallcap 100	18,075.95	**-29.05**	**-0.16**	**-2.36**	**-4.66**
S&P 500	6,728.80	**8.48**	**0.13**	**-1.80**	**14.66**
DJIA	46,987.10	**74.8**	**0.16**	**-0.74**	**10.84**
Nasdaq 100	25,059.81	**-70.23**	**-0.28**	**-3.52**	**19.47**
Nikkei 225	50,276.37	**-607.31**	**-1.19**	**-2.37**	**27.91**
Hang Seng	26,241.83	**-244.07**	**-0.92**	**0.32**	**33.73**
Shanghai Com	3,997.56	**-10.20**	**-0.25**	**0.53**	**22.53**

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,492.30	57,876.80
Support	25,370 & 25,300	57,360 & 56,950
Resistance	25,680 & 25,800	58,150 & 58,350

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	18,485.25	13,903.91	**4,581.34**
DII Cash Market	19,470.01	12,795.24	**6,674.77**

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Shriram Finance	816.35	**3.01**	9765.25
Adani Enterprise	2369.40	**2.38**	2232.89
Bajaj Finance	1066.60	**2.37**	6940.92
Tata Steel	181.37	**2.31**	19165.88
M&M	3690.20	**1.98**	2595.93
Top Losers			
Bharti Airtel	2001.20	**-4.47**	70392.75
TATA Cons. Prod	1167.20	**-1.95**	1351.61
Interglobe Avi	5583.50	**-1.92**	795.27
Tech Mahindra	1386.70	**-1.90**	1209.48
Apollo Hospital	7642.00	**-1.80**	486.39

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.63	**0.39**	**-16.20**
WTI (USD/bbl)	59.75	**0.54**	**-18.30**
Gold Spot (USD/t oz.)	4,001.26	**0.60**	**50.54**
USD/INR	88.67	**-0.05**	**3.52**
10 Year G-Sec India	6.514	**-0.02**	**-3.94**
US 10 Year Bond	4.097	**0.33**	**-10.34**

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity benchmarks closed flat on Friday 07th November, as foreign outflows outweighed optimism over corporate earnings and India–US trade talks.

Global

The Nasdaq closed lower, but the S&P 500 and Dow rose late Friday as investors concluded a roller-coaster week marked by economic concerns, the longest federal government shutdown in history, and sky-high tech company values.

Japan's Nikkei share average fell heading for its biggest weekly drop since early April, as heavyweight tech stocks tracked an overnight decline in US peers on stretched valuation concerns.

Hong Kong stocks resumed their decline as investors returned to risk-off mode after China's exports unexpectedly slipped and signs of a softening US jobs market emerged.

Commodities & Currency :

The Indian rupee dipped on Friday but held above its record low as frequent interventions by the Reserve Bank of India supported the currency in the face of outflows and persistent dollar demand from importers.

Gold prices rose as the dollar softened and uncertainty around the US government shutdown added to safe-haven demand, while Wall Street indexes were set for sharp weekly declines.

News:

India's retail vehicle sales should remain strong through the rest of 2025, an auto dealers' body said on Friday, as tax cuts and strong rural demand boosted retail sales to a record high in October.

India's top gas importer Petronet LNG will receive 500,000 tons of liquefied natural gas (LNG) in 2026 in its 1.2 million ton per year supply deal with ExxonMobil from Australia's Gorgon project, its managing director said.

Singapore Telecommunications (Singtel) said on Friday it had sold a 0.8% stake worth S$1.5 billion ($1.16 billion) in India's Bharti Airtel, as part of the Southeast Asian telecom company's ongoing asset restructuring strategy.

Indian beauty retailer Nykaa's quarterly profit more than trebled on Friday, boosted by steady demand for makeup and skincare products as well as new tie-ups with global brands.

Indian financial assets are looking attractive across the board, HSBC said on Friday, citing equities' appeal as a hedge against the searing rally in global AI stocks, a favourable risk-profile for holding the rupee and value in government bonds.

India's Hindalco Industries beat quarterly profit estimates on Friday as firmer commodity prices helped offset tariff-related pressure at its U.S. unit Novelis.