AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 12th November 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,694.95	120.6	0.47	-0.27	8.22
BSE Sensex	83,871.32	335.97	0.40	-0.13	6.83
Bank Nifty	58,138.15	200.6	0.35	0.06	13.86
Nifty Midcap 100	60,427.00	302.75	0.50	0.23	5.18
Nifty Smallcap 100	18,101.40	-37.2	-0.21	-2.23	-4.53
S&P 500	6,846.61	14.18	0.21	-0.08	16.67
DJIA	47,927.96	559.33	1.18	1.25	13.06
Nasdaq 100	25,533.49	-78.25	-0.31	-1.69	21.73
Nikkei 225	50,842.93	-68.83	-0.14	-1.27	29.35
Hang Seng	26,696.41	47.35	0.18	2.06	36.04
Shanghai Com	4,002.76	-15.84	-0.39	0.66	22.69

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,694.95	58,138.15
Support	25,550 & 25,430	57,600 & 56,120
Resistance	25,830 & 25,960	58,340 & 58,490

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,487.40	15,290.62	-803.22
DII Cash Market	14,832.97	12,644.50	2,188.47

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Interglobe Avi	5782.50	3.47	959.13
Bharat Elec	427.30	2.51	24889.36
M&M	3749.10	2.33	3044.04
Adani Ports	1474.40	2.04	2258.83
HCL Tech	1570.00	1.91	2270.76
Top Losers			
Bajaj Finance	1005.20	-7.35	23762.89
Bajaj Finserv	1989.40	-6.09	4943.75
ONGC	249.45	-0.78	16183.88
TMPV	407.60	-0.69	8120.95
Apollo Hospital	7501.00	-0.38	306.74

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	65.09	1.61	-14.28
WTI (USD/bbl)	61.00	1.45	-16.59
Gold Spot (USD/t oz.)	4,115.07	-0.02	54.82
USD/INR	88.57	0.15	3.41
10 Year G-Sec India	6.475	-0.23	-4.52
US 10 Year Bond	4.079	-0.90	-10.72

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity indices rose after an uncertain beginning on Tuesday 11th November, buoyed by optimism over a potential trade deal with Washington and measures toward the reopening of the US government.

Global

The Dow Jones Industrial Average surged to a record high close on Tuesday, lifted by progress toward ending the longest US government shutdown, while Nvidia and other artificial intelligence-related companies fell on renewed concerns about elevated valuations.

Japan's Nikkei share average fell, reversing earlier gains, after investors took a rally in tech shares as an opportunity to lock in profits.

Hong Kong stocks rose to a one-month high, as the risk-on mood held up after US lawmakers made headway on ending the longest-ever government shutdown, a key overhang weighing on sentiment.

Commodities & Currency :

The Indian rupee inched up, helped by modest inflows and dollar sales from state-run banks, but progress in US-India trade negotiations remained the focal point for future direction, traders said.

Gold edged down as traders booked profits after prices hit a near three-week high earlier in the session, while hopes that resumption of US economic data could prompt a Federal Reserve rate cut next month limited losses.

News:

India's statistics ministry has proposed revamping the way it compiles the country's key industrial output index by replacing closed factories in the sample with active facilities, a move aimed at improving data accuracy and aligning with global standards.

India's cotton imports are forecast to climb 9.8% in the new season to a record high, driven by India move to allow duty-free overseas purchases and a drop in local output to a 17-year low, industry officials told Reuters.

Singapore's Wilmar International said on Tuesday its unit has agreed to purchase a 13% stake in India's AWL Agri Business from Adani Commodities for 46.5 billion rupees ($529.04 million).

US President Donald Trump said on Monday the United States was getting close to reaching a deal with India that would expand economic and security ties between the two countries boost US energy exports and promote investments in key US sectors.

India's Tata Power plans to set up the country's largest solar wafers and ingots manufacturing plant with a capacity of 10 gigawatts, chief executive Praveer Sinha said.

Some export-focused green hydrogen projects in India are likely to start later than originally planned due to global policy uncertainties, potentially delaying the country's clean fuel ambitions, a senior government official said.