

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,879.15	3.35	0.01	0.45	9.00
BSE Sensex	84,478.67	12.16	0.01	0.60	7.61
Bank Nifty	58,381.95	107.3	0.18	0.48	14.34
Nifty Midcap 100	60,692.05	-210.25	-0.35	0.67	5.64
Nifty Smallcap 100	18,183.65	-66.8	-0.37	-1.78	-4.09
S&P 500	6,737.49	-113.43	-1.66	-1.67	14.81
DJIA	47,457.22	-797.6	-1.65	0.25	11.95
Nasdaq 100	24,993.46	-523.87	-2.05	-3.77	19.15
Nikkei 225	51,281.83	218.52	0.43	-0.42	30.46
Hang Seng	27,073.03	150.3	0.56	3.50	37.96
Shanghai Com	4,029.50	29.36	0.73	1.33	23.51

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,879.15	58,381.95
Support	25,780 & 25,670	57,840 & 57,580
Resistance	26,000 & 26,100	58,600 & 59,000

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,902.63	15,286.31	-383.68
DII Cash Market	16,036.19	12,944.32	3,091.87

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Asian Paints	2879.40	3.96	5933.63
Hindalco	811.95	2.21	5854.64
ICICI Bank	1385.90	1.99	18296.63
Interglobe Avi	5905.50	1.90	1250.92
L&T	4002.50	1.21	1834.96
Top Losers			
Eternal	297.75	-3.58	63585.99
TMCV	320.75	-2.64	12079.52
M&M	3699.50	-1.46	1599.08
ONGC	250.85	-1.18	13057.93
Bharat Elec	419.80	-1.17	9091.43

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.04	0.53	-16.98
WTI (USD/bbl)	58.77	0.48	-19.64
Gold Spot (USD/t oz.)	4,205.38	0.81	58.22
USD/INR	88.67	-0.03	3.52
10 Year G-Sec India	6.473	0.22	-4.55
US 10 Year Bond	4.117	-0.05	-9.89

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian markets closed flat on Thursday 13th November; with advances in metal stocks and positive earnings tempered by caution ahead of Bihar's state election results, which are viewed as critical for policy continuity.

Global

Wall Street ended sharply lower on Thursday, with steep losses in Nvidia and other AI heavyweights, as investors scaled back expectations of interest rate cuts due to inflation worries and divisions among central bankers about the US economy's health.

Japan's Nikkei share average edged up higher, as the historic US government shutdown ended, while the broader Topix index posted a record high close on value-buying.

Hong Kong stocks rose for a fourth day, the longest rising streak in two months, reversing early losses spurred by concerns about some bellwether companies' earnings results, as Alibaba Group Holding and Zijin Mining Group led a late charge.

Commodities & Currency :

The Indian rupee closed marginally lower, as outflows and dollar demand fuelled by importers' ongoing hedging outweighed the positive impact of a broadly weaker dollar.

Gold prices rose to a more than three-week high on Thursday, boosted by anticipation that the publication of economic data following the reopening of the US government will strengthen the case for a Federal Reserve interest rate decrease next month.

News:

Hero MotoCorp India's top two-wheeler maker by sales reported a better-than-expected quarterly profit on Thursday, on the back of demand fuelled by domestic tax cuts as well as strong exports.

India's Tata Steel hopes the government will extend import tariffs on some steel products to guard against the threat of imports, particularly from China, chief executive T.V. Narendran told Reuters.

India's Tata Motors, the country's top commercial vehicles maker, expects high single-digit percentage growth in demand in the second half of the fiscal year, driven by government's tax cuts and a pick-up in construction.

India's ReNew Energy Global Plc said on Thursday it will invest about 820 billion rupees (\$9.33 billion) in the southern state of Andhra Pradesh to expand its clean energy portfolio.

India's credit guarantee support for exporters will require a budget allocation of 20 billion rupees (\$227.54 million) for the fiscal year 2026, a government source told reporters on Thursday.

LG Electronics India reported a 27% fall in quarterly profit in its first results since listing, as consumers delayed purchases of electronics and home goods following recent tax cuts.

Moody's Ratings expects India's economy to grow at 6.5% through 2027, the ratings agency said in a statement.

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