Daily Market Insight

~ Where the market left its footprints

18th November 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	26,013.45	103.4	0.40	0.97	9.56
BSE Sensex	84,950.95	388.17	0.46	1.16	8.21
Bank Nifty	58,962.70	445.15	0.76	1.48	15.48
Nifty Midcap 100	61,180.50	441.30	0.73	1.48	6.49
Nifty Smallcap 100	18,347.60	95.1	0.52	-0.90	-3.23
S&P 500	6,672.41	-61.7	-0.92	-2.62	13.70
DJIA	46,590.24	-557.24	-1.18	-1.58	9.90
Nasdaq 100	24,799.92	-208.32	-0.83	-4.52	18.23
Nikkei 225	50,323.91	-52.62	-0.10	-2.28	28.03
Hang Seng	26,384.28	-188.18	-0.71	0.86	34.45
Shanghai Com	3,972.04	-18.46	-0.46	-0.11	21.75

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	26,013.45	58,962.70
Support	25,900 & 25,813	58,600 & 58,260
Resistance	26,100 & 26,210	59,521 & 59,730

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,339.02	12,896.85	442.17
DII Cash Market	12,975.94	11,510.08	1,465.86

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	309.55	1.91	26632.68
TATA Cons. Prod	1178.90	1.82	2105.78
Max Healthcare	1121.60	1.68	5102.28
Eicher Motors	6799.00	1.55	789.64
Maruti Suzuki	15878.00	1.24	301.07
Top Losers			
TMPV	372.70	-4.73	32393.35
Jio Financial	312.00	-0.92	8876.00
UltraTechCement	11778.00	-0.81	194.38
Asian Paints	2887.90	-0.64	1230.68
Tata Steel	173.17	-0.63	28204.28

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	64.26	-0.20	-15.33
WTI (USD/bbl)	59.98	-0.18	-17.93
Gold Spot (USD/t oz.)	4,074.59	-0.23	53.30
USD/INR	88.64	0.12	3.49
10 Year G-Sec India	6.498	0.19	-4.18
US 10 Year Bond	4.125	-0.33	-9.72

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian stocks climbed on Monday 17th November, with mid-caps reaching a new high, as investors anticipated resurgence in earnings after the September quarter ended without any disappointments.

Global

US stocks ended sharply lower with the S&P 500 and the Nasdaq closing below a key technical indicator for the first time since late April as investors braced for quarterly results from retailers and chip giant Nvidia and awaited a long-delayed US jobs report this week.

Tokyo stocks dropped as tensions between Japan and China hit retail and tourism issues, while growing concerns over the deterioration of Japan's fiscal health under Prime Minister Sanae Takaichi prompted selling of the yen and the debt.

Hong Kong stocks fell as investors turned cautious ahead of the long-delayed release of key US economic data, with uncertainty over the Federal Reserve's rate moves and the artificial intelligence bubble narrative also dampening risk appetite.

Commodities & Currency :

The Indian rupee finished slightly higher as small dollar inflows helped the currency retain its ground in the face of strong importer hedging demand and data indicating India's trade imbalance reached a record high in October.

Gold prices ticked down pressured by a stronger dollar and reduced expectations of a US interest rate cut next month, as investors waited delayed economic data this week that could offer clues on the Federal Reserve's policy path.

News:

India's merchandise trade deficit widened to a record high of $41.68 billion in October, due to a rise in gold imports and a fall in US-bound exports during the second month of steep US tariffs on Indian goods, government data showed.

Indian agricultural exporters are among the winners from US President Donald Trump's exemption of dozens of food items from his reciprocal tariffs regime, which some analysts say could help to revive lost demand.

Shares of India's Tata Motors Passenger Vehicles fell as much as 7.2% on Monday to a seven-month low, as the carmaker cut its fiscal 2026 margin goal for Jaguar Land Rover after a cyberattack, sparking concerns over volume growth.

India is confident of meeting its direct tax collection target of 25.2 trillion rupees ($284.39 billion) for this financial year, Ravi Agrawal, chairman of the Central Board of Direct Taxes said.

Indian clean energy developer Inox Green Energy Services tab has lost grid connectivity for its 300 megawatt (MW) wind project in Gujarat after failing to complete it on time, a filing with the country's power regulator showed.