AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

25th November 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,959.50	-108.65	-0.42	0.76	9.34
BSE Sensex	84,900.71	-331.21	-0.39	1.10	8.14
Bank Nifty	58,835.35	-32.35	-0.05	1.26	15.23
Nifty Midcap 100	60,081.60	-194.70	-0.32	-0.34	4.58
Nifty Smallcap 100	17,696.50	-151.00	-0.85	-4.41	-6.66
S&P 500	6,705.12	102.13	1.55	-2.14	14.26
DJIA	46,448.27	202.86	0.44	-1.88	9.57
Nasdaq 100	24,873.85	634.28	2.62	-4.23	18.58
Nikkei 225	48,625.88	NA	NA	-5.58	23.71
Hang Seng	25,716.50	496.48	1.97	-1.69	31.05
Shanghai Com	3,836.77	1.87	0.05	-3.51	17.60

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,959.50	58,835.35
Support	25,800 & 25,710	58,550 & 58,240
Resistance	26,030 & 26,150	59,120 & 59,400

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	54,504.95	58,676.70	-4,171.75
DII Cash Market	20,445.48	15,932.61	4,512.87

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Tech Mahindra	1494.70	2.27	6808.66
Eicher Motors	7258.50	1.74	1229.30
Bajaj Auto	9007.50	1.30	466.20
Wipro	247.27	1.14	19711.07
Shriram Finance	828.20	0.60	8140.58
Top Losers			
Bharat Elec	403.80	-3.01	23696.86
JSW Steel	1106.00	-3.01	2209.72
Max Healthcare	1155.80	-2.14	2825.31
Grasim	2688.70	-1.69	917.20
Tata Steel	165.36	-1.57	31202.77

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.12	0.90	-16.87
WTI (USD/bbl)	58.58	0.90	-19.90
Gold Spot (USD/t oz.)	4,090.11	0.62	53.89
USD/INR	89.24	0.19	4.19
10 Year G-Sec India	6.476	-0.63	-4.50
US 10 Year Bond	4.036	0.29	-11.66

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's key stock indexes dipped on Monday 24th November, due to broad-based profit booking, while an increase in information technology companies on increased forecasts of a Federal Reserve rate decrease in December limited losses. The GIFT Nifty was trading 0.02% or 5 points higher at 25,992 as of 6:45 a.m., which implied a flat-to-positive open for the NSE Nifty 50 index.

Global

Wall Street stocks closed higher on Monday, extending Friday's rally as increased odds that the US Federal Reserve will lower its Fed funds target rate in December helped investors look past concerns about inflated tech valuations.

Hong Kong stocks surged on Monday, rebounding from the biggest sell-off in a month ahead of a week packed with major company earnings and a deluge of US economic data delayed by the government shutdown.

Commodities & Currency :

The Indian rupee posted its biggest one-day gain in a month as central bank assistance helped it recover from near all-time lows, even though traders expect the currency to depreciate further in the near term.

Gold prices rose on Monday, supported by growing expectations of a Federal Reserve interest rate cut next month and a weaker dollar.

News:

India's solar module exports fell sharply in September to their lowest this year after US trade measures curbed shipments, forcing manufacturers to redirect supplies to the domestic market, industry officials and analysts said.

Reserve Bank of India Governor Sanjay Malhotra said in an interview with Zee Business on Monday that there is scope to further reduce policy interest rates.

Canada and India have agreed to restart stalled talks for a new trade deal, the Indian government said on Sunday, after discussions between the two countries paused following a diplomatic spat two years ago.

Indian sugar mills are struggling to secure export deals as global prices remain below domestic rates, discouraging new contracts and making it unlikely they will ship the entire 1.5-million-metric-ton export quota, trade officials told Reuters.

Singapore's Temasek-backed Sembcorp Industries has started talks over an initial public offering of its India unit in Mumbai and appointed three investment banks, including Citi and HSBC, three sources familiar with the matter said.

India's Hindustan Aeronautics Ltd (HAL) said the crash of a Tejas fighter jet in Dubai last week was an isolated occurrence caused by exceptional circumstances, without providing further details.

UK cosmetics brand Lush has returned to India around two decades after its exit, aiming to tap the country's booming luxury beauty market, a senior executive told Reuters.

Disclaimer:

Ajcon Global Services Limited is a SEBI registered Research Analyst (INH000001170). This report is for informational purposes only and not an offer or solicitation to buy/sell securities. Investments in the securities market are subject to market risks; please read all related documents carefully before investing. The views expressed are based on publicly available information believed to be reliable, but no assurance is given for its accuracy or completeness. Ajcon and its associates may have commercial relationships with companies mentioned. Investors are advised to exercise independent judgment and consult their financial advisor before making investment decisions. For detailed Disclosure and Disclaimer, please click the below link: http://ajcononline.com/disclosure-and-disclaimer-2/