AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

26th November 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,884.80	-74.7	-0.29	0.47	9.02
BSE Sensex	84,587.01	-313.7	-0.37	0.72	7.74
Bank Nifty	58,820.30	-15.05	-0.03	1.24	15.20
Nifty Midcap 100	60,298.00	216.40	0.36	0.02	4.96
Nifty Smallcap 100	17,730.30	33.8	0.19	-4.23	-6.48
S&P 500	6,765.89	60.78	0.91	-2.14	14.26
DJIA	47,112.45	664.18	1.43	-1.88	9.57
Nasdaq 100	25,018.36	144.51	0.58	-4.23	18.58
Nikkei 225	48,659.52	33.64	0.07	-5.51	23.79
Hang Seng	25,894.55	178.05	0.69	-1.01	31.96
Shanghai Com	3,870.02	33.26	0.87	-2.68	18.62

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,884.80	58,820.30
Support	25,800 & 25,710	58,550 & 58,240
Resistance	26,020 & 26,130	59,150 & 59,430

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,596.24	15,810.92	785.32
DII Cash Market	15,153.03	11,240.56	3,912.47

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Hindalco	789.35	1.90	6090.78
Bharat Elec	410.25	1.60	14107.50
SBI	983.60	1.34	9140.20
Shriram Finance	838.25	1.21	5418.15
Dr Reddys Labs	1236.10	0.81	1983.82
Top Losers			
Adani Enterpris	2332.90	-2.76	2223.72
TMPV	352.45	-1.63	12577.57
Trent	4243.90	-1.55	1019.74
Infosys	1530.60	-1.12	8107.95
HDFC Bank	989.80	-0.94	24989.38

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	62.27	-1.74	-17.99
WTI (USD/bbl)	57.77	-1.82	-21.00
Gold Spot (USD/t oz.)	4,145.89	0.23	55.98
USD/INR	89.22	0.02	4.17
10 Year G-Sec India	6.456	-0.31	-4.80
US 10 Year Bond	4.003	0.08	-11.66

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's stock indexes declined for the third straight session on Tuesday 25th November, as investors continued to book profits at record highs on a day when monthly contracts expire.

Global

Wall Street extended its rally on Tuesday as a spate of economic data appeared to support the case for the US Federal Reserve to implement its third and final rate cut of the year in December, while softness in the tech sector limited the Nasdaq's gains.

Japan's Nikkei stock gauge erased most of its early gains to end nearly flat on Tuesday as SoftBank Group tanked almost 10% on concerns about competition between OpenAI's ChatGPT and Google's Gemini.

China stocks ended higher, rebounding from a two-month low on Tuesday, as tech shares led gains on signs of easing geopolitical tensions and as global markets shrugged off worries that the AI sector is overheating.

Commodities & Currency :

The Indian rupee closed roughly flat on Tuesday, giving up early gains as month-end dollar demand from importers countered broader rise in regional currencies.

Gold prices ticked up on Tuesday as softer-than-expected US retail sales data reinforced traders' expectations that the Federal Reserve will trim interest rates in December.

News:

India's Tata Motors is betting its newly launched sport-utility vehicle will help step up competition to rivals like Hyundai Motor and Maruti Suzuki in a fiercely fought and fast-growing part of the market.

India's economy likely grew 7.3% in the July–September quarter, according to a Reuter's poll of economists, underpinned by strong rural and government expenditure even as private capital spending remained subdued.

India's Russian oil imports are set to hit their lowest in at least three years in December, down from multi-month highs in November, as refiners turned to alternatives to avoid breaching Western sanctions, trade and refining sources said.

Alphabet's Google and venture capital firm Accel will partner to fund at least 10 early-stage Indian AI startups, marking the US technology giant's first such funding partnership, top executives at the companies said on Thursday.

India is considering extending an import tariff, locally known as a safeguard duty, on some steel products to counter cheaper imports primarily from China, according to a source with direct knowledge of the matter.

The International Monetary Fund is likely to reclassify India's foreign exchange rate management regime in the near future, Bloomberg News reported on Tuesday citing people familiar with the matter.