

Indian Indices	Nov 18	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84673	-0.33	4.18	9.48	23.10
Nifty 50	25910	-0.40	4.15	10.47	22.33
BSE Mid cap	47168	-0.70	3.83	6.68	32.31
Nifty Midcap	60822	-0.59	6.49	12.54	33.59
Nifty Smallcap	18155	-1.05	2.05	3.70	32.67
BSE SmallCap	52988	-0.85	0.91	1.86	33.50

Source: BSE, NSE

Indian Indices	Nov 18	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61000	-0.40	8.48	17.19
BSE Bankex	66103	-0.08	6.48	15.16
BSE CD	62753	0.21	3.08	4.09
BSE CG	70530	-0.94	5.63	6.75
BSE FMCG	20358	-0.64	-0.04	-1.14
BSE Healthcare	44539	-0.82	-0.01	5.75
BSE IT	35086	-1.15	3.10	-14.62
BSE Metal	34391	-1.07	9.93	14.41
BSE Oil & Gas	28846	-0.54	10.76	11.93
BSE Power	6738	-0.67	2.24	-7.28
BSE Realty	7201	-1.98	3.16	-3.24

Source: BSE, NSE

Global Indices	Nov 18	1D % Chg	3M % Chg	1Y % Chg
DJIA	46092	-1.07	2.63	6.23
Nasdaq	22433	-1.21	3.71	19.38
FTSE 100	9552	-1.27	4.31	17.79
Nikkei 225	48703	-3.22	11.41	27.43
Hang Seng	25930	-1.72	2.99	32.45

Source: Financial websites

Rs. Cr (Equity)	FII Inv Nov 17	MF Inv Nov 14	DII Inv Nov 18
Buy	16685	20701	13344
Sell	13018	13512	10949
Net	3667	7190	2395
Net (YTD)	-144484	451160	651247

Source: NSDL, NSE

Debt Market Indicators	Nov 18	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	4.95%
10 Yr Gilt^	6.53%	6.55%
91-day T-bill^	5.39%	5.38%
182-day T Bill^	5.54%	5.52%
364-day T Bill^	5.54%	5.54%
3-mth CP rate	6.52%	6.54%
6-mth CP rate	6.68%	6.68%
1-yr CP rate	6.85%	6.85%
3-mth CD rate	6.00%	6.01%
6-mth CD rate	6.19%	6.22%
12-mth CD rate	6.38%	6.38%
5 yr Corp Bond	6.85%	6.85%
Net LAF o/s (Rs Cr)*	-196682	-190185
M3 supply (Rs lakh Cr)**	289.95	287.15
G-sec Volume (Rs Cr)	42120	30755
SDF*	196682	132805
1 Year OIS	5.46%	5.47%
US 10-year Treasury Yield	4.12%	4.13%

*Data with 1-day lag (includes fixed and variable repo & reverse repos) ^Weighted average yield

**Oct 31 and Oct 17 respectively

Indian Equity

- Indian equity benchmarks closed lower on Tuesday, due to a fall in IT and metal stocks, as investors awaited key US economic data releases.
- The top losers were Interglobe Aviation, Tech Mahindra, TATA Consumer Products, Jio Financial and Infosys—down 1.41-2.27%.
- The top gainers were Bharti Airtel, Axis Bank, Asian Paints, Maruti Suzuki and Shriram Finance —up 0.28%-1.75%.

Global Equity

- Wall Street stocks closed lower on Tuesday, dragged down by tech stocks due to valuation concerns and a weak outlook from Home Depot.
- FTSE index closed lower on Tuesday due to losses in financial stocks and fading hopes of a Federal Reserve rate cut.
- Strait Times Index closed lower on Tuesday, due to stock-specific losses.
- Nikkei Index closed lower on Tuesday after broad selling due to escalation in tensions between Tokyo and Beijing.
- Hang Seng Index closed lower on Tuesday, tracking Wall Street, over fears of inflated valuations of artificial intelligence stocks.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended higher at 5.00% on Tuesday compared to 4.95% on Monday.
- Government bond prices rose on Tuesday supported by bargain buying and possible RBI purchases.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.53% on Tuesday compared to 6.55% on Monday.

Capital Market

- NBCC Ltd sold 432 residential units at Aspire Leisure Valley and Aspire Centurion Park for Rs 1,069 crore to AU Real Estate.
- Atul Projects bagged a housing redevelopment project in Mumbai with an estimated revenue of around Rs 750 crore.
- Asset Homes plans to invest Rs 500 crore in four senior living projects across Kerala.
- WPIL announced that its South African subsidiary has received a contract worth Rs 426 crore from Metsi Ke Matla JV.
- Conscient Infrastructure Pvt Ltd has awarded a Rs 350-crore construction contract to NCC Ltd.

Regulatory

- The insolvency and Bankruptcy Board of India (IBBI) proposed to ease regulations to extend resolution gains to all homebuyers in affected projects of a bankrupt real estate developers.

Economy and Government

- According to Central Board of Direct Taxes (CBDT) chairman Ravi Agrawal the Income Tax Department will notify new ITR forms and related rules under the streamlined Income Tax Act, 2025, by January 2026.
- The UIDAI has launched a new Aadhaar mobile app for iOS and Android, offering early access for residents to test its features.
- Union Food and Consumer Affairs Minister Pralhad Joshi said the Centre has allowed exports of 15 lakh tonnes of sugar for 2025-26 marketing year starting October and will look into the industry's demand to increase the minimum selling price of the sweetener.
- The Centre for Development of Telematics (C-DOT) signed a Memorandum of Understanding with the Andhra Pradesh government to participate in Amaravati Quantum Valley (AQV) initiative.

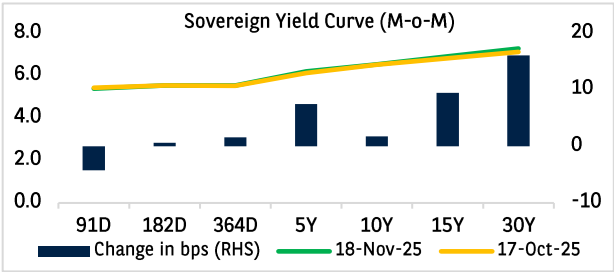
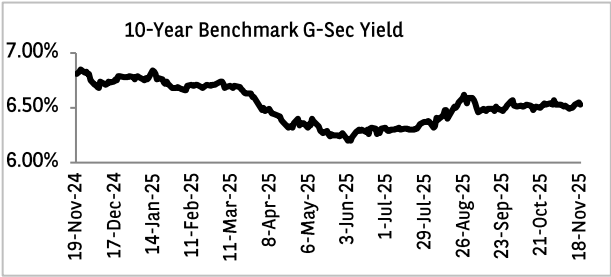
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	705,000	126,000	495,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.54	6.47	7.18	7.22	8.45	8.98
1-Yr	5.57	6.67	7.38	7.42	8.65	9.18
3-Yr	5.92	6.78	7.49	7.53	8.76	9.29
5-Yr	6.20	6.85	7.66	7.69	8.93	9.46
10-Yr	6.53	7.13	7.94	7.97	9.21	9.74

G-sec and corporate bonds data as of Nov 18

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	0.25% (Oct'25)	1.61% (Jul'25)	6.21% (Oct'24)
IIP	4.0% (Aug'25)	1.9% (May'25)	0.0% (Aug'24)
GDP	7.8% (Apr-Jun FY25)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY24)
GST Collection (in Rs cr)	1,95,936 (Oct-25)	1,95,735 (Jul-25)	1,87,346 (Oct-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Nov 18	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	64.89	64.2	66.6	73.3
NYMEX Crude Oil (\$/bbl)	60.74	59.91	63.42	69.16
Gold (Rs / 10 gm)#	122180	122924	99623	74808

Ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Nov 18	Nov 17
USD	88.63	88.63
GBP	116.58	116.45
Euro	102.78	102.79
100 Yen	57.15	57.26
Forex Reserve (\$ bn)*	687.03	689.73
Dollar Index	99.64	99.59

*Data pertains to Nov 7 and to Oct 31 respectively

Source: RBI, Financial Websites

International

- US ADP Employment Change Weekly cut 2,500 jobs per week on average during the four weeks ending November 1st, 2025, following an 11,250 decline in the previous period.
- Japan Machinery Orders increased to 11.6% in September 2025 compared to 1.6% in August 2025.

Commodities

- Crude oil prices rose by 83 cents to \$60.74 a barrel on the NYMEX as investors assessed Western sanctions on Russian supplies and comments from US President on Federal Reserve leadership.

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