

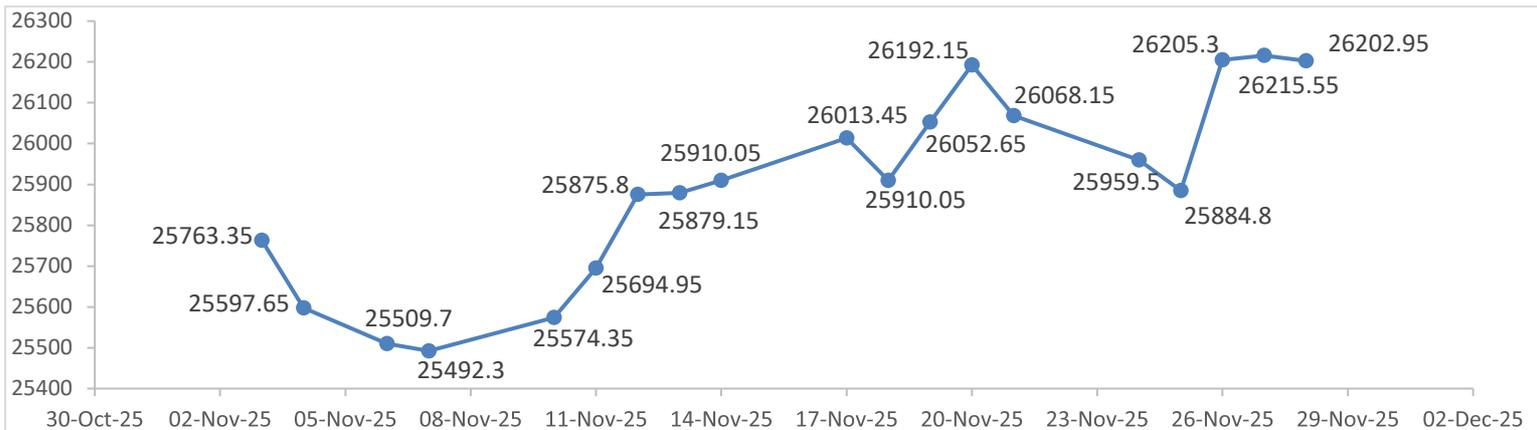
Nifty 50

26,202.95 **+480.85**
(+1.87%)

52 Week High: 26,310.45

52 Week Low: 21,743.6

Resistance		Support	
R1	26,287	S1	26,158
R2	26,327	S2	26,119
R3	26,391	S3	26,054



Sectorial Indices	Prev. Close (31-Oct'25)	Close (28-Nov'25)	% Change (1M)
Nifty Auto	26,809	27,774	3.60%
Nifty PSU Bank	8,184	8,514	4.03%
Nifty Pharma	22,175	22,105	-0.32%
Nifty IT	35,712	37,405	4.74%
Nifty FMCG	56,208	55,595	-1.09%
Nifty Metal	9,154	10,293	12.44%
Nifty Fin Serv	27,138	27,890	2.77%
Nifty Cons	38,615	37,881	-1.90%

Global Indices	Prev. Close (31-Oct'25)	Close (28-Nov'25)	% Change (1M)
Dow Jones	47,562	47,716	0.32%
Nasdaq	23,724	23,365	-1.51%
FTSE	9,717	9,712	-0.05%
Hang Seng	26,282	25,858	-1.61%
USD/INR	88.78	89.32	0.61%
GBP/INR	116.78	118.26	1.27%

Net Flow	Amount (Rs Cr)
FII	-17,500.31
DII	77,083
MF Equity	29,911.05
MF Debt	-25,692.63

Index	Prev. Close (31-Oct'25)	Close (28-Nov'25)	% Change (1M)
SENSEX	83,938	85,706	2.11%
NIFTY 50	25,722	26,202	1.87%
BANK NIFTY	57,776	59,752	3.42%

Top Gainers	Prev. Close (31-Oct'25)	Close (28-Nov'25)	% Change (1M)
ASIANPAINT	2,510.8	2,874.4	14.48%
SHRIRAMFIN	748.9	851.6	13.72%
TECHM	1,424.4	1,517.3	6.52%
M&M	3,487.2	3,757.3	7.75%
SUNPHARMA	1,690.7	1,831.6	8.33%

Top Losers	Prev. Close (31-Oct'25)	Close (28-Nov'25)	% Change (1M)
TMPV	410	356.8	-12.98%
TRENT	4,694.3	4,250.4	-9.46%
TATASTEEL	182.84	167.96	-8.14%
ADANIENT	2,405.3	2,280.2	-5.20%
POWERGRID	288.15	269.95	-6.32%

*Nifty 500 constraint

Commodities	Prev. Close (31-Oct'25)	Close (28-Nov'25)	% Change (1M)
Gold	1,12,232	1,26,883	13.05%
Silver	1,48,287	1,71,637	15.75%
Crude (WTI)	60.98	58.55	-3.98%

Contact us :

+91 22 6932 1000

+91 97 6932 1000

www.endovia.in



Diamond Business Partner
Authorized Person

Motilal Oswal Financial Services Ltd.

Reach us :

809, Neelkanth Corporate Park,
Kiroil Road, Vidyavihar (West)
Mumbai-400 086

Large-Cap Leadership and Small-Cap Weakness Mark November 2025 Markets:

Indian equity markets exhibited a clear divergence between large-cap strength and small-cap weakness. While the Nifty 50 and Sensex climbed to fresh highs, the Nifty Smallcap index fell about 3%, highlighting uneven performance across segments. Institutional flows played a key role: foreign investors continued net selling, withdrawing significant funds, while domestic institutions selectively bought large and mid-cap stocks, leaving smaller companies under pressure. Small-cap underperformance reflects valuation concerns and weaker earnings momentum, even as blue-chip stocks attract capital and support broader market leadership.

Cabinet Clears 100% FDI in Insurance Sector to Boost Growth and Capital Inflows:

The Union Cabinet has approved the Insurance Laws (Amendment) Bill, 2025, to raise the foreign direct investment (FDI) limit in India's insurance sector from 74% to 100%, marking one of the most significant reforms in years. This change is expected to attract substantial global capital, enhance competition, and improve customer services across life, general, and health insurance businesses. The sector has already drawn around ₹82,000 crore in FDI to date. The bill also includes broader regulatory reforms to strengthen policyholder protection, ease of doing business, and market expansion.

US Federal Reserve Lowers Interest Rates:

The US Federal Reserve recently cut its benchmark federal funds rate by 25 basis points, lowering the target range to 3.50%–3.75%, the lowest level in around three years. This marked the third straight rate reduction in 2025, following earlier cuts in September and October, as policymakers responded to signs of slowing growth and labor-market concerns while inflation remained somewhat elevated. The decision was divisive among officials, with some dissenting on the pace of easing, and the Fed signaled it may pause future cuts pending incoming economic data.

IPO Boom Lifts Markets in November 2025:

India's IPO market saw a sharp surge in November 2025, with over ₹76,000 crore worth of public issues lined up for subscription, marking one of the strongest months for the primary market. The robust pipeline reflected renewed investor confidence, healthy equity market conditions, and strong corporate readiness to tap capital markets. Both retail and institutional investors showed strong participation, supported by favorable macroeconomic trends and optimism around India's growth outlook. The surge highlighted increasing appetite for new listings and reinforced the strength of India's equity ecosystem and primary market momentum.

IPO Update :-

Company Name	IPO Date (November'25)	Market Response
Tenneco Clean Air	12 Nov – 14 Nov	61.79x oversubscribed
Capillary Technologies	14 Nov – 18 Nov	52.98x oversubscribed
Groww	04 Nov – 07 Nov	17.60x oversubscribed

Contact us :

+91 22 6932 1000

+91 97 6932 1000

www.endovia.in



Diamond Business Partner

Authorized Person

Motilal Oswal Financial Services Ltd.

Reach us :

809, Neelkanth Corporate Park,
Kiroli Road, Vidyavihar (West)
Mumbai-400 086

