Retail Research

SBI Securities®

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Weekly Wrap

13th November 2026



For Private Circulation Only



Market Review

Indian benchmark indices extended their upward trajectory during the truncated week with the Nifty 50 and BSE Sensex rising 0.5% and 0.7% WoW, respectively. The weekly gains were supported by sustained foreign institutional inflows, cooling crude oil prices early in the week, and largely resilient 2QFY27 corporate earnings, though an uptick in domestic retail inflation triggered late-week profit booking. Investor sentiment remained constructive through the first half of the week as easing Middle East supply concerns temporarily pulled Brent crude below $90 per barrel before prices rebounded toward ~$96 per barrel. In the broader markets, performance was notably robust, with Midcap (+2.2% WoW) and Smallcap (+3.0% WoW) indices outshining large-cap benchmarks alongside healthy market breadth.

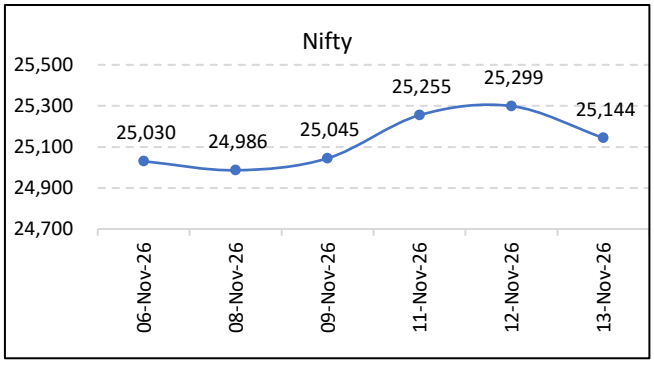
Globally, volatility across major technology and AI-linked counters on the Nasdaq, Kospi and Nikkei prompted international investors to rotate funds toward emerging markets like India. Meanwhile, the final leg of the 2QFY27 earnings season concluded on a largely positive note. Across a sample of 1,216 manufacturing companies (with market capitalizations above Rs 1,000 cr), revenue grew 24.4% YoY/4.6% QoQ, while PAT rose 32.5% YoY/18.0% QoQ. In the BFSI space (169 companies), PAT expanded 22.8% YoY/4.1% QoQ. Companies like Reliance Industries, Titan, ONGC, MCX, Eternal, Hindalco, Solar Industries, Apar Industries, Shriram Finance, Coforge, Coal India, TVS Motor, Polycab, UNO Minda, Tech Mahindra, L&T, Marico, and Bharti Airtel delivered strong earnings growth. Sectorally, Metals, Consumer Discretionary, Capital Goods, select Auto, Oil & Gas, and Telecom outperformed, whereas Aviation, FMCG, Consumer Durables, and Cement remained muted.

For the week, BSE IT emerged as the top laggard, declining 2.6% WoW, while Bankex (+3.5%), Capital Goods (+3.3%), Realty (+2.6%), and Healthcare (+2.4%) led the gainers. Institutional activity showed strong foreign inflows, with FIIs net buying equities worth Rs 45,259 cr, while DIIs booked profits to the tune of Rs 22,639 cr (DII data till November 12, 2026).

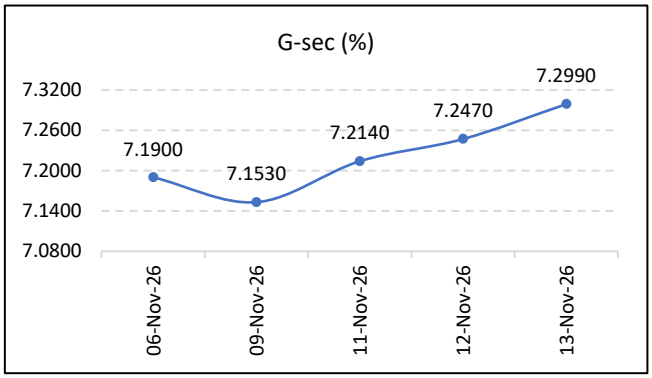
Going ahead, markets are likely to consolidate in the near term as investors assess the macroeconomic fallout of October's CPI inflation print—which accelerated to a two-year high of 6.09%, breaching the RBI's 6% upper tolerance band—alongside crude oil trajectories, US bond yields, and sustained FII flows. Market participants are expected to favour large-cap names offering strong earnings visibility and healthy balance sheets. With the earnings season now largely behind us, block and bulk deal activity in the secondary market is expected to intensify, while an uptick in upcoming IPOs could temporarily absorb secondary market liquidity.

From a technical perspective, the 24,800 mark remains a crucial support level for the Nifty. As long as the index sustains above this threshold, the short-term bullish structure remains intact, with ongoing consolidation potentially laying the groundwork for the next leg of the rally. On the upside, the recent swing high of 25,420 represents an immediate resistance hurdle; a decisive close above this level could reignite bullish momentum and pave the way toward the 25,650–25,700 zone in the near term.

CNX Nifty



10 year Government of India Bond Yield



Indices	06-Nov	13-Nov	% Chg
Nifty	25,030.4	25,144.3	0.5
Sensex	81,028.0	81,592.5	0.7
Midcap	16,389.1	16,744.6	2.2
Small cap	6,823.3	7,030.6	3.0

Indices	06-Nov	13-Nov	% Chg
BSE Bankex	66,470.0	68,809.3	3.5
BSE Cap Goods	70,461.1	72,756.7	3.3
BSE Realty	6,994.8	7,175.1	2.6
BSE Healthcare	51,664.6	52,884.4	2.4
BSE PSU	20,016.4	20,481.7	2.3
BSE Power	7,108.1	7,211.5	1.5
BSE FMCG	17,551.5	17,641.8	0.5
BSE Auto	61,118.2	61,432.5	0.5
BSE Cons Durab	61,766.3	61,980.0	0.3
BSE Metal	40,545.3	40,457.2	(0.2)
BSE Oil	26,547.0	26,476.1	(0.3)
BSE IT	31,072.7	30,259.3	(2.6)

08 Nov - 13 Nov		
Rs in Cr	**FII Inv**	**DII Inv***
Buy	1,07,172.6	48,655.6
Sell	61,913.2	71,294.1
Net	45,259.4	(22,638.5)

* Data till 12th November, 2026

Top 5 Performers – Sensex			
	Close 06-11-2026	**Close 13-11-2026**	**% Chg**
SBI	1,018.0	1,080.5	6.1
Bajaj Finance	1,085.0	1,115.2	2.8
Trent	3,075.0	3,160.0	2.8
HDFC Bank	787.0	803.1	2.0
InterGlobe Aviation	5,476.0	5,587.3	2.0

Top 5 Performers – Nifty			
	Close 06-11-2026	**Close 13-11-2026**	**% Chg**
SBI	1,018.5	1,080.0	6.0
HDFC Life	565.3	592.3	4.8
BSE	3,800.0	3,937.7	3.6
Trent	3,079.0	3,165.2	2.8
Bajaj Finance	1,087.8	1,117.0	2.7

Top 5 Losers – Sensex			
	Close 06-11-2026	**Close 13-11-2026**	**% Chg**
HCL Tech	1,438.6	1,376.6	(4.3)
Tech Mahindra	1,830.0	1,765.4	(3.5)
TCS	2,498.1	2,410.0	(3.5)
Infosys	1,180.7	1,140.0	(3.4)
Titan	4,994.0	4,850.4	(2.9)

Top 5 Losers – Nifty			
	Close 06-11-2026	**Close 13-11-2026**	**% Chg**
Grasim	3,227.0	3,034.0	(6.0)
HCL Tech	1,440.0	1,378.0	(4.3)
Tech Mahindra	1,831.0	1,764.0	(3.7)
TCS	2,498.5	2,407.5	(3.6)
Infosys	1,181.4	1,141.5	(3.4)

Source: BSE/NSE/Bloomberg/NSDL

Global Market Update

World Indices	Country	Last Price	Valuation - P/E (x)		% Change				
			CY26E	CY27E	1W	1M	3M	6M	12M
DJIA*	USA	52,297.1	21.1	19.7	2.0	1.3	(2.7)	5.6	10.2
Nasdaq*	USA	25,366.1	27.9	20.7	3.2	(5.0)	(5.1)	(3.3)	10.9
S&P 500*	USA	7,592.4	20.9	17.9	2.9	(1.6)	(2.5)	2.5	12.7
Russell 2000*	USA	2,799.1	35.7	22.7	1.6	2.5	(8.8)	0.2	17.5
DAX*	Germany	26,771.9	18.0	15.7	3.7	5.8	1.3	11.8	11.4
CAC*	France	8,361.4	14.4	13.5	2.7	6.2	(3.2)	5.1	1.6
FTSE 100*	UK	10,863.1	12.9	12.3	1.8	1.3	1.1	6.5	10.8
STOXX Europe 600*	Europe	664.0	15.5	14.3	2.4	4.1	0.9	9.4	14.4
Nikkei	Japan	61,142.4	20.3	18.0	6.5	(9.7)	(11.0)	(0.4)	19.2
Hang Seng	Hong Kong	23,637.6	11.1	9.8	(3.4)	(2.8)	(5.9)	(9.0)	(12.7)
Shanghai Composite	China	3,634.4	13.5	11.6	(0.4)	(3.5)	(7.5)	(12.1)	(9.8)
KOSPI	Korea	5,290.5	5.2	3.6	4.6	(12.0)	(24.2)	(29.4)	26.9
Straits Times	Singapore	5,231.8	16.1	14.9	1.0	(3.5)	(8.9)	4.9	14.3
SET	Thailand	1,504.9	13.1	12.7	2.7	(4.5)	(6.5)	(0.9)	16.9
S&P ASX 100	Australia	7,670.0	19.4	18.0	0.6	4.3	0.2	6.3	5.4
Bovespa Brazil 50*	Brazil	1,71,324.3	8.0	7.7	1.7	(17.0)	2.6	(3.4)	9.0

* Data till 12th November 2026

Global Commodity Update

World Commodities*	Unit	Last Price	% Change				
			1W	1M	3M	6M	12M
Brent Crude	$/barrel	95.8	(2.5)	(9.7)	8.2	(12.3)	52.1
Natural Gas Spot	$/mmBtu	3.1	18.1	(4.8)	9.9	3.5	(13.5)
Coal - Newcastle	$/Ton	147.3	3.7	(4.6)	5.9	1.7	23.7
Copper LME	$/Ton	13,642.1	(2.3)	(6.5)	(6.4)	1.0	24.6
Aluminium LME	$/Ton	3,137.2	(0.5)	5.0	(3.4)	(13.5)	9.3
Zinc LME	$/Ton	3,761.0	0.7	(0.2)	(2.6)	6.9	18.4
Nickel LME	$/Ton	16,030.3	(0.9)	4.7	(3.5)	(12.4)	8.4
Gold	$/Troy Ounce	3,877.1	(4.8)	(5.6)	(11.4)	(14.6)	(7.1)
Silver	$/Troy Ounce	50.0	(3.7)	(10.0)	(22.7)	(34.2)	(4.4)
Raw Sugar	$/lb.	18.2	(0.1)	(12.6)	9.8	23.1	26.2
Cotton	$/lb.	82.5	(0.3)	(1.8)	(4.8)	(0.0)	20.7
Rubber	JPY/kg	442.0	2.1	(2.2)	(3.9)	10.6	38.1
Coffee Robusta	$/lb.	3,222.0	(1.9)	(7.5)	(11.0)	(10.4)	(26.3)
Palm Oil Malaysia Spot	$/Ton	1,145.0	-	-	-	(1.9)	10.6
Baltic Dry Index	points	3,020.0	7.7	13.2	5.5	(4.2)	45.4

* Data till 12th November 2026

Source: Bloomberg

Major Currency Performance vs USD

Currency Pairs USD	Last Price	% Change				
		1W	1M	3M	6M	12M
Dollar Index	103.2	0.9	1.0	3.3	4.8	4.1
USD/INR	94.2	(0.4)	1.1	1.3	1.5	(5.9)
USD/JPY	159.9	(0.9)	(1.0)	(0.3)	(1.3)	(3.4)
USD/EUR	0.9	0.9	1.4	4.4	6.0	5.3
USD/GBP	0.8	1.0	0.3	2.0	2.3	(0.2)
USD/CNY	6.7	0.0	0.3	1.1	1.8	6.4

Live Price on 13th Nov'26 at 4:00 pm

Major Currency Performance vs INR

Currency Pairs INR	Last Price	% Change				
		1W	1M	3M	6M	12M
USD/INR	94.2	(0.4)	1.1	1.3	1.5	(5.9)
JPY/INR	0.6	0.7	2.3	1.8	2.9	(2.5)
EUR/INR	104.2	0.7	2.2	5.6	7.5	(1.2)
GBP/INR	124.7	0.8	1.1	3.2	3.7	(6.5)
CNY/INR	14.1	(0.4)	0.8	0.2	(0.2)	(11.5)

Live Price on 13th Nov'26 at 4:00 pm

Source: Bloomberg



Corporate News

IIFL Finance: Board approved a primary capital raise of Rs 6,414 cr through a preferential issue. Funds managed by Blackstone Private Equity will invest Rs 5,000 cr through a preferential allotment of compulsorily convertible preference shares (CCPS). The CCPS will be converted into equity shares at Rs 602 per share within 18 months of allotment. Concurrently, the company's promoters, Nirmal Jain and R Venkataraman, will invest Rs 1,264 cr.

HEG Advanced Material: Wholly owned subsidiary, TACC Ltd, signed a non-binding MoU with a global lithium-ion cell manufacturer for the long-term supply of upto 40,000 tonnes of synthetic graphite-based Anode Active Material (AAM) for electric mobility applications. Further, the subsidiary also received an approval letter for Rs 609.5 cr incentive under ECMS for its Synthetic Graphite Anode Material Project in Dewas.

Adani Enterprises: Kutch Copper signed a MoU with Codelco to establish key terms of cooperation for forming a strategic exploration partnership for the Kaburkaala project in the Calama copper belt of the Antofagasta Region in northern Chile.

Sandur Manganese: Received environmental clearance from the Environment Ministry to increase iron ore RoM production capacity from 7.85 million tonnes per annum (MTPA) to 9.42 MTPA.

Prestige Estates: Acquired 100% stake in Allure Developers for Rs 524 cr.

Alivus Life: Entered into share purchase agreement to acquire 76% stake in IQGEN-X Pharma Pvt Ltd, with option to acquire the remaining 24% stake in 5 years.

NBCC (India): Signed an MoU with the West Bengal government for various development works in the state.

Amagi Media Labs: Partnered with Golden Times Media to distribute 4 Chinese channels globally via Amagi CONNECT.

Clean Max Enviro: Signed an MoU with the Andhra Pradesh government to invest Rs 50,000 cr in a clean energy complex that will power a 2 GW compute factory.

Zee Entertainment: Approved a buyback of up to Rs 600 cr, comprising up to 6.6 cr shares at Rs 91 per share (~26% premium to CMP).

Source: BSE/NSE/Economic Times/NDTV Profit/Business Line/Business Standard/Financial Express/Money Control

EIH: Board approved Rs 777 cr Trident hotel in Hyderabad, expected to become operational by Sep'30.

GAIL: Signed a pact with the Andhra Pradesh Economic Development Board alongside Krishak Bharati Cooperative to explore the possibility of establishing a gas-based urea plant in the state.

Krishna GVK Luxury Hotels: Announced the opening of Taj Yelahanka on 20th Nov'26, which is a 256-key luxury hotel in Bengaluru. The hotel will be operated by The Indian Hotels Company under the Taj brand through a long-term management agreement.

Source: BSE/NSE/Economic Times/NDTV Profit/Business Line/Business Standard/Financial Express/Money Control



Domestic & Global Economic Update



US Oct'26 CPI comes in hotter than expected: The US headline CPI rose 0.4% MoM on a seasonally adjusted basis during Oct'26, higher than forecasts of 0.3% MoM. Consumer prices increased more than expected amid higher costs for food and accommodation, reinforcing expectations that the Federal Reserve will raise interest rates next month.

India's Oct'26 CPI inflation breaches RBI's upper limit: India's headline CPI inflation stood at 6.1% YoY for Oct'26, breaching the RBI's upper tolerance limit of 6% and bolstering the case for rate hikes. Food inflation came in at 8.9% YoY vs 7.7% YoY in Sep'26.





India's Equity Mutual Fund inflows fall 14% MoM in Oct'26: India's mutual fund industry registered a strong recovery in net inflows, attracting Rs 1.74 lakh cr in Oct'26 compared with outflows of Rs 1.33 lakh cr in Sep'26. The recovery was primarily driven by liquid and overnight debt funds, as debt mutual funds attracted net inflows of Rs 1.13 lakh cr during the month compared to Rs 1.83 lakh cr outflows in Sep'26. On the flip side, Equity mutual funds saw net inflows moderate nearly 14% MoM to Rs 32,994 cr. Mid-cap and Small-cap equity funds saw net inflows decline nearly 38%/29% MoM respectively, while Large-cap funds attracted Rs 8,484 cr - nearly double of September's net inflows of Rs 4,271 cr.

Source: BSE/NSE/Economic Times/NDTV Profit/Business Line/Business Standard/Financial Express/Money Control



Order Inflows during the week

Date	Company	Mcap (Rs cr)	Order Size (Rs cr)	Client	Execution span
09-11-2026	Larsen & Toubro	5,69,492	1,000 - 2,500	Noida Metro Rail Corporation	36 months
07-11-2026	BHEL	1,51,574	600 - 900	Power Grid Corporation of India	44 months
11-11-2026	BHEL	1,51,574	600 - 900	Power Grid Corporation of India	35 months
12-11-2026	HFCL	31,385	834.4	International Entity	Jun'27
11-11-2026	Cochin Shipyard	31,004	500.0	Ministry of Defence	2 years
11-11-2026	Time Technoplast	9,428	38.1	Public Sector OMC	6 months
07-11-2026	Time Technoplast	9,428	35.0	Methanol Chemicals Company, Saudi Arabia	1 year
07-11-2026	SEAMEC	4,118	246.3*	Larsen & Toubro	May'27
11-11-2026	Ashoka Buildcon	3,153	555.3*	Druk Green Power Corporation, Bhutan	18 months
09-11-2026	Ashoka Buildcon	3,153	865.9	National Highways Authority of India	18 months
10-11-2026	HLE Glascoat	3,045	395 - 450*	International Entity	Nov'28
13-11-2026	DCX Systems	1,793	25.5	Multiple Orders	-

*Conversion rate of 1 USD = INR 94.2
Source: BSE



Macro Economic Event Calendar

Country	Macro Economic Event Calendar	Previous	Forecast
16th November 2026			
IND	Oct'26 Balance of Trade (USD bn)	-30.2	-32.0
IND	Oct'26 WPI Inflation (YoY)	11.4%	12.1%
CNY	Oct'26 Industrial Production (YoY)	5.5%	5.3%
EUR	Sep'26 Industrial Production (MoM)	-0.5%	-
JPY	Sep'26 Industrial Production (YoY)	2.7%	-
17th November 2026			
USA	Oct'26 Industrial Production (MoM)	0.7%	0.1%
USA	Oct'26 Retail Sales (MoM)	0.8%	-
18th November 2026			
GBP	Oct'26 Core CPI (MoM)	0.2%	-
GBP	Oct'26 CPI (MoM)	0.4%	-
EUR	Oct'26 Core CPI (MoM)	0.2%	0.3%
EUR	Oct'26 CPI (MoM)	0.6%	0.4%
JPY	Oct'26 Balance of Trade (Yen bn)	-536.6	-
20th November 2026			
IND	Oct'26 Index of Core Industries (MoM)	7.9%	-
JPY	Oct'26 CPI (MoM)	0.0%	-

Country / Organisation	
IND	India
USA	United States of America
CNY	China
GBP	United Kingdom
EUR	European Union
JPY	Japan

Source: Bloomberg



Insider trades during the week

Company Name	CMP* (Rs)	Mcap (Rs cr)	Net Buy/Sell	Net Quantity	Net Value (Rs cr)	Net % Traded	Latest Promoter holding
Havells India Ltd	1,159.8	72,789	Buy	27,05,000	303.38	0.43%	59.4%
Ramkrishna Forgings Ltd	785.0	14,567	Buy	2,00,000	14.52	0.11%	40.9%
360 ONE WAM Ltd	1,176.5	50,403	Sell	1,21,974	13.93	0.00%	5.9%
Astral Ltd	1,263.0	33,931	Buy	1,00,001	12.65	0.03%	54.2%
Westlife Foodworld Ltd	659.1	10,277	Buy	1,53,650	10.44	0.10%	57.9%
Globus Spirits Ltd	731.9	2,302	Buy	70,671	4.98	0.22%	46.7%
Gandhar Oil Refinery (India) Ltd	262.9	2,573	Buy	1,94,368	4.89	0.18%	66.7%
Thomas Cook (India) Ltd	108.3	5,095	Buy	4,80,000	4.85	0.11%	64.8%
Vinati Organics Ltd	1,115.3	11,561	Buy	42,301	4.42	0.04%	74.3%
Sangam India Ltd	635.9	3,195	Buy	59,810	3.71	0.12%	70.5%
Avenue Supermarts Ltd	3,441.6	2,24,496	Sell	10,105	3.48	0.00%	74.5%
TV Today Network Ltd	105.5	629	Buy	2,05,000	2.15	0.35%	63.2%
NINtec Systems Ltd	896.1	1,665	Buy	16,829	1.54	0.09%	47.6%
Parag Milk Foods Ltd	328.9	4,131	Sell	43,842	1.45	0.04%	40.5%
V-Guard Industries Ltd	305.0	13,331	Sell	30,000	0.90	0.00%	53.2%
Panchsheel Organics Ltd	107.9	142	Buy	75,000	0.80	0.57%	56.1%
Speciality Restaurants Ltd	141.4	682	Buy	43,660	0.61	0.09%	50.8%
Aurum PropTech Ltd	218.0	1,572	Buy	25,000	0.53	0.03%	38.1%
JK Cement Ltd	5,158.2	39,857	Sell	1,000	0.53	0.00%	45.7%
KPIT Technologies Ltd	546.2	14,972	Sell	8,000	0.41	0.01%	38.6%
Indowind Energy Ltd	9.6	154	Buy	4,22,000	0.40	0.25%	48.8%
HCL Technologies Ltd	1,373.6	3,72,735	Sell	2,000	0.29	0.00%	60.9%
AXIS Bank Ltd	1,333.3	4,15,253	Sell	2,000	0.27	0.00%	7.9%
NCC Ltd	134.2	8,426	Buy	20,210	0.25	0.00%	23.2%
Kross Ltd	302.2	1,995	Buy	7,400	0.22	0.02%	67.0%
Shellz India Ltd	173.0	209	Buy	12,800	0.21	0.11%	63.6%
Ion Exchange India Ltd	317.8	4,660	Buy	6,000	0.18	0.00%	25.1%
Sugs Lloyd Ltd	253.0	587	Buy	7,000	0.18	0.05%	70.7%
EFC (I) Ltd	166.2	2,492	Buy	10,000	0.17	0.00%	56.1%
Cupid Breweries And Distilleries Ltd	23.6	215	Sell	71,009	0.16	0.08%	54.0%
Info Edge (India) Ltd	1,183.0	76,708	Sell	1,350	0.16	0.00%	37.2%
Tiger Logistics (India) Ltd	26.8	283	Buy	60,000	0.15	0.06%	57.7%
Gravita India Ltd	1,501.7	11,084	Sell	1,001	0.15	0.00%	55.9%
Vectras Enprocon Ltd	106.0	202	Buy	12,000	0.13	0.06%	73.5%
Nirlon Ltd	637.8	5,747	Sell	2,000	0.13	0.01%	67.7%
Acme Universal Safezone 9 Ltd	97.3	186	Buy	11,200	0.12	0.05%	69.7%
Chembond Chemicals Ltd	229.6	617	Buy	5,042	0.12	0.02%	68.2%

**Current market price is live price as on 13th Nov'26*
Source: BSE, SSL Research
Kindly note: Data pertains to Market Purchase & Market Sale filings under Promoters, Promoter group and Immediate relative related categories.

Company Name	CMP* (Rs)	Mcap (Rs cr)	Net Buy/Sell	Net Quantity	Net Value (Rs cr)	Net % Traded	Latest Promoter holding
Indoco Remedies Ltd	228.1	2,106	Buy	5,225	0.12	0.00%	58.9%
Kasturi Metal Composite Ltd	63.0	65	Buy	16,000	0.11	0.15%	67.9%
Thyrocare Technologies Ltd	492.7	7,852	Buy	2,121	0.10	0.00%	51.0%
Karur Vysya Bank Ltd	381.4	36,865	Sell	2,000	0.08	0.00%	2.0%
Mach Travel Solutions Ltd	219.0	461	Buy	2,400	0.06	0.01%	74.8%
Sinclairs Hotels Ltd	75.2	385	Buy	5,014	0.04	0.01%	64.5%
Nureca Ltd	300.9	287	Buy	1,155	0.03	0.01%	70.7%
CSL Finance Ltd	231.2	527	Buy	1,548	0.03	0.01%	49.2%
Indokem Ltd	630.0	1,757	Sell	516	0.03	0.00%	68.6%
Trishakti Industries Ltd	325.0	549	Buy	1,100	0.03	0.00%	67.3%
Suvidhaa Infoserve Ltd	2.0	59	Sell	1,54,140	0.03	0.08%	38.3%
Jhaveri Credits & Capital Ltd	169.8	189	Sell	1,541	0.03	0.01%	64.6%
Indostar Capital Finance Ltd	205.3	3,319	Buy	998	0.02	0.00%	70.3%
Triveni Glass Ltd	10.8	14	Buy	15,188	0.01	0.12%	5.8%
Damodar Industries Ltd	29.8	69	Sell	5,000	0.01	0.01%	70.1%
Chembond Material Technologies Ltd	194.8	262	Buy	700	0.01	0.00%	68.2%
Jayant Agro Organics Ltd	240.2	721	Buy	448	0.01	0.00%	67.2%
Amines & Plasticizers Ltd	150.5	828	Buy	100	0.00	0.00%	73.2%

**Current market price is live price as on 13th Nov'26*
Source: BSE, SSL Research
Kindly note: Data pertains to Market Purchase & Market Sale filings under Promoters, Promoter group and Immediate relative related categories.



Key Bulk and Block Deals

(For companies above Rs 1,000 cr Market Cap)

NSE Bulk Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
09-11-2026	COHANCE LIFESCIENCES	JASUB PROPERTY HOLDINGS LLP	BUY	430.0	30,00,000	0.8%
09-11-2026	COHANCE LIFESCIENCES	JASTI FAMILY TRUST	SELL	430.0	30,00,000	0.8%
11-11-2026	COHANCE LIFESCIENCES	JASUB PROPERTY HOLDINGS LLP	BUY	449.5	21,00,000	0.6%
11-11-2026	COHANCE LIFESCIENCES	JASTI FAMILY TRUST	SELL	449.5	21,00,000	0.6%
11-11-2026	ADITYA INFOTECH	DIXON TECHNOLOGIES (INDIA) LTD	SELL	4,140.0	14,04,962	1.1%
11-11-2026	SOLARA ACTIVE PHARMA	FIRST SENTIER INVESTORS ICVC - SI INDIAN SUBCONTINENT ALL CAP FUND	BUY	663.8	5,51,618	1.2%
11-11-2026	SOLARA ACTIVE PHARMA	THE SCOTTISH ORIENTAL SMALLER COMPANIES TRUST PLC	SELL	663.8	5,51,618	1.2%
12-11-2026	GALLANTT ISPAT	SANTOSH KUMAR AGRAWAL	BUY	503.0	40,00,000	1.7%
12-11-2026	GALLANTT ISPAT	DINESH R AGARWAL	SELL	503.0	40,00,000	1.7%
12-11-2026	MANAKSIA COATED	GROWVIA TRADE PVT LTD	BUY	167.7	20,35,835	1.7%

NSE Block Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
09-11-2026	COHANCE LIFESCIENCES	JASUB PROPERTY HOLDINGS LLP	BUY	430.0	30,00,000	0.8%
09-11-2026	COHANCE LIFESCIENCES	JASTI FAMILY TRUST	SELL	430.0	30,00,000	0.8%
11-11-2026	COHANCE LIFESCIENCES	JASUB PROPERTY HOLDINGS LLP	BUY	449.5	21,00,000	0.6%
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12-11-2026	GALLANTT ISPAT	SANTOSH KUMAR AGRAWAL	BUY	503.0	40,00,000	1.7%
12-11-2026	GALLANTT ISPAT	DINESH R AGARWAL	SELL	503.0	40,00,000	1.7%

BSE Bulk Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

BSE Block Deals

Date of Deal	Company Name	Client Name	Buy/ Sell	Price (Rs)	Quantity Traded	% Traded
N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Source: Stock Exchange filings, SSL Research | Above list consists of only key bulk & block deals and is not exhaustive.



Technical Desk

Nifty Chart



FII Inflows Power Nifty's Third Consecutive Weekly Gain

Following the sharp rally in the preceding week, Indian equity markets witnessed a phase of consolidation as investors took a breather. Nevertheless, Nifty managed to extend its winning streak for the third consecutive week, closing 0.63% higher. A key highlight has been the resurgence of foreign institutional investor (FII) participation. After remaining largely on the side-lines, FIIs made a strong comeback, registering robust buying activity across most trading sessions since the beginning of the November series.

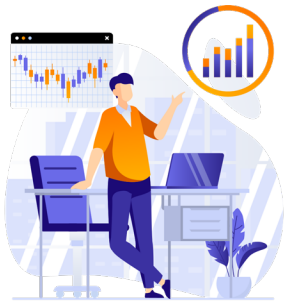
Bank Nifty continued to outperform the benchmark, supported by sustained buying interest in frontline banking counters, particularly public sector banks. The Nifty PSU Bank index emerged as one of the standout performers, registering impressive weekly gains of 7.84%.

Another encouraging development was the revival in broader market participation, which had remained relatively subdued during the earlier phase of the rally. Both the Nifty Midcap 100 and Nifty Smallcap 100 indices outperformed the frontline benchmarks, advancing 1.98% and 2.56%, respectively, reflecting improving market breadth and renewed investor appetite for broader market equities.

With the corporate earnings season nearing completion, global developments are likely to play an increasingly important role in determining the near-term market trajectory. Brent crude oil prices, in particular, have witnessed heightened volatility, with the recent sharp correction emerging as a key catalyst for the rally in Indian equities, especially banking stocks.

From a technical perspective, the underlying momentum remains firmly positive despite the recent consolidation. The daily RSI continues to hover around the 75 mark, reflecting sustained bullish momentum and reinforcing the strength of the prevailing uptrend.

Looking ahead, the 24,800 mark remains a crucial support level for Nifty. As long as the index sustains above this level, the short-term bullish outlook is likely to remain intact, with the ongoing consolidation potentially laying the foundation for the next leg of the rally. On the upside, the recent swing high of 25,420 represents an immediate resistance hurdle. A decisive close above this level could signal renewed bullish momentum and pave the way for an extension of the rally towards the 25,650–25,700 zone in the near term.



Corporate Action

Dividend

Company Name	Ex-Date	Div %	DPS (Rs)	FV (Rs)	CMP (Rs)	Type	Div. Yield (%)
Indag Rubber Ltd.	16-Nov-26	45.0	0.9	2.0	106.1	Interim	0.8
Australian Premium Solar (India) Ltd.	16-Nov-26	1.5	0.2	10.0	216.4	Interim	0.1
Shipping Corporation Of India Ltd.	16-Nov-26	40.0	4.0	10.0	269.0	Interim	1.5
ASM Technologies Ltd.	16-Nov-26	60.0	6.0	10.0	6,295.8	Interim	0.1
Cochin Shipyard Ltd	16-Nov-26	60.0	3.0	5.0	1,196.0	Interim	0.3
EAAA India Alternatives Ltd.	17-Nov-26	140.0	7.0	5.0	1,836.5	Interim	0.4
Power Finance Corporation Ltd.	17-Nov-26	41.0	4.1	10.0	339.0	Interim	1.2
MRF Ltd.	17-Nov-26	30.0	3.0	10.0	1,28,615.9	Interim	0.0
Nile Ltd	17-Nov-26	30.0	3.0	10.0	1,237.0	Interim	0.2
Connplex Cinemas Ltd.	18-Nov-26	5.0	0.5	10.0	236.0	Interim	0.2
AK Capital Services Ltd	18-Nov-26	180.0	18.0	10.0	1,936.0	Interim	0.9
ARCL Organics Ltd	18-Nov-26	10.0	1.0	10.0	224.0	Interim	0.4
Manappuram Finance Ltd	18-Nov-26	50.0	1.0	2.0	320.0	Interim	0.3
TD Power Systems Ltd	18-Nov-26	65.0	0.7	1.0	625.9	Interim	0.1
Ingersoll-Rand (India) Ltd.	19-Nov-26	200.0	20.0	10.0	4,015.1	Interim	0.5
Talbros Automotive Components Ltd.	20-Nov-26	15.0	0.3	2.0	416.0	Interim	0.1
Venus Pipes & Tubes Ltd.	20-Nov-26	5.0	0.5	10.0	1,882.0	Interim	0.0
Oil India Ltd	20-Nov-26	70.0	7.0	10.0	440.0	Interim	1.6
Prevest Denpro Ltd	20-Nov-26	10.0	1.0	10.0	418.0	Interim	0.2
Shanmuga Hospital Ltd	20-Nov-26	1.0	0.1	10.0	44.0	Interim	0.2
Pashupati Cotspin Ltd.	23-Nov-26	2.0	0.0	1.0	33.5	Interim	0.1

Open Offer

Company Name	Start Date	Close Date	Offer Price (Rs)	Acquisition (No. of Shares)	CMP (Rs)	Last Traded Date
IIFL Capital Services Ltd.	02-Nov-26	16-Nov-26	350.0	10,01,44,112	352.5	12-Nov-26
Niks Technology Ltd.	03-Nov-26	17-Nov-26	136.0	23,16,964	366.4	12-Nov-26
Kronox Lab Sciences Ltd.	06-Nov-26	20-Nov-26	157.3	95,70,000	195.7	12-Nov-26
Mayur Leather Products Ltd.	09-Nov-26	23-Nov-26	27.9	12,57,048	32.0	12-Nov-26
Oseaspre Consultants Ltd.	09-Nov-26	23-Nov-26	48.0	1,82,000	-	-
GSL Securities Ltd.	11-Nov-26	25-Nov-26	42.0	11,11,526	67.9	09-Nov-26
Oscar Global Ltd.	18-Nov-26	02-Dec-26	10.0	18,53,096	23.8	09-Nov-26
Mapro Industries Ltd.	19-Nov-26	03-Dec-26	60.1	21,81,121	116.0	12-Nov-26
Tusaldah Ltd.	20-Nov-26	04-Dec-26	20.0	37,83,000	109.0	09-Nov-26
Prabhhans Industries Ltd.	26-Nov-26	09-Dec-26	41.3	54,82,248	91.0	12-Nov-26
Hiliks Technologies Ltd.	30-Nov-26	11-Dec-26	72.0	36,92,000	75.1	12-Nov-26
Inani Securities Ltd.	07-Dec-26	18-Dec-26	60.0	11,85,002	33.7	09-Nov-26
Comrade Appliances Ltd.	08-Dec-26	21-Dec-26	35.0	26,46,487	43.0	12-Nov-26
Avishkar Infra Realty Ltd.	09-Dec-26	22-Dec-26	23.0	58,24,853	567.2	24-Aug-26
Genomic Valley Biotech Ltd.	14-Dec-26	28-Dec-26	30.0	7,94,170	50.0	12-Nov-26
Hittco Tools Ltd.	18-Dec-26	01-Jan-27	10.3	58,77,261	20.6	12-Nov-26

Source: ACE Equity, Exchange Fillings

Stock Split

Company Name	Ex-date/ Record Date	FV Before Split (Rs)	FV After Split (Rs)	Comment
BN Agrochem Ltd.	16-Nov-26	10.0	1.0	-
Interarch Building Solutions Ltd.	30-Nov-26	10.0	2.0	-

Bonus

Company Name	Record/Ex-Bonus Date	Ratio
N.A.	N.A.	N.A.

Rights Issue

Company Name	Ex/Record Date	Ratio	Offer Price (Rs.)	FV (Rs)	CMP (Rs)	Last Traded Date
Ironwood Education Ltd	18-Nov-26	34:100	41.0	10.0	48.0	12-Nov-26

Buyback Offer - Upcoming

Company Name	Record date	Face Value (Rs)	Market Type	CMP (Rs)	Buyback Price (Rs)	Buyback Amount (Rs Cr)
Medi Assist Healthcare Services Ltd	20-Nov-26	5.0	Tender Offer	275.0	425.0	49.3
Zee Entertainment Enterprises Ltd	25-Nov-26	1.0	Tender Offer	73.5	91.0	600.0

Buyback Offer - Ongoing

Company Name	Offer Open Date	Offer Closing Date	Face Value (Rs)	Market Type	CMP (Rs)	Buyback Price (Rs)	Buyback Amount (Rs Cr)
N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Upcoming Board Meetings & Agenda

Company Name	Board Meeting Date	Agenda
Ekam Leasing & Finance Company Ltd.	14-Nov-26	Preferential Issue of shares
Amarnath Securities Ltd.	14-Nov-26	Right Issue of Equity Shares
Aditya Birla Money Ltd.	14-Nov-26	Fund Raising
Om Metallogic Ltd.	14-Nov-26	Right Issue of Equity Shares
Goldkart Jewels Ltd.	14-Nov-26	Fund Raising
Balu Forge Industries Ltd.	14-Nov-26	Preferential Issue of shares
Dhampur Bio Organics Ltd.	14-Nov-26	Buy Back of Shares
Mohini Health & Hygiene Ltd.	14-Nov-26	Fund Raising
WOL 3D India Ltd.	14-Nov-26	Fund Raising
Kanel Industries Ltd.	14-Nov-26	Right Issue of Equity Shares
Shreeji Shipping Global Ltd.	14-Nov-26	Stock Split
Euphoria Infotech (India) Ltd.	14-Nov-26	Issue Of Warrants
T.T. Ltd.	16-Nov-26	Buy Back of Shares
AMPVOLTS Ltd.	16-Nov-26	Fund Raising
Adroit Infotech Ltd.	17-Nov-26	Fund Raising

Company Name Change

Date of Announcement	Old Name	New Name
09-Nov-26	Photon Capital Advisors Ltd	Inference Platforms Ltd

Source: ACE Equity, Exchange Fillings

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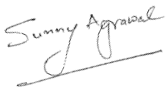
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