PROGRESSIVE'S EVENING STROLL DATE: 18 November, 2025

Market Snapshot:

After the initial fall, the Index continued to consolidate in a range and eventually settled the trade lower at 25,910, declining by 103.40 points. All sectors finished in red, with Realty and IT being the major laggards. Broader markets underperformed Nifty50 as Mid and Smallcaps corrected by 0.59% & 1.05%, respectively.

HOW THE DAY TRENDED

INDICES

Index	Close	Points	%Chg.
Sensex	84673.02	(277.93)	(0.33)
Nifty50	25910.05	(103.40)	(0.40)
Nifty Midcap 100	60822.00	(358.50)	(0.59)
Nifty Small Cap 100	18154.75	(192.85)	(1.05)

SECTORAL GAINERS / LOSERS

Sectors	Close	Points	%Chg.
NIFTY BANK	58899.25	(63.45)	(0.11)
NIFTY PSU BANK	8477.75	(13.90)	(0.16)
NIFTY IT	35975.20	(400.00)	(1.10)
NIFTY REALTY	927.30	(18.05)	(1.91)

NIFTY TOP GAINERS / LOSERS

Gainers	CMP (Rs)	%Chg.	Losers	CMP (Rs)	%Chg.
BHARTI AIRTEL	2149.20	1.75	INDIGO	5739.50	(2.27)
AXISBANK	1265.40	1.26	TECH MAHINDRA	1422.00	(2.12)
ASIAN PAINTS	2906.00	0.63	TATA CONSUMER	1154.10	(2.10)
MARUTI	15930.00	0.33	JIOFIN	305.95	(1.94)

INDICES LEVELS FOR November 19, 2025

Nifty (future)	
Resistance	26080
Support	25815

Bank Nifty (future)	
Resistance	59140
Support	58810

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KEY TAKEAWAYS OF THE DAY

♦ **KEC International secures Rs10.16bn in new orders, marks maiden oil & gas win in Middle East:**

The company has announced fresh orders worth Rs10.16bn across its Civil, Transmission & Distribution, Oil & Gas Pipelines, and Cables & Conductors businesses. The company also confirmed a major milestone with its first Oil & Gas project win in the GCC region, strengthening its global footprint.

♦ **KPI Green Energy secures Rs6965mn contract for 200MW solar power project at Khavda, Gujarat:**

The company has announced that it has signed contract agreements with SJVN Ltd, a Government of India enterprise, for an order worth Rs6965mn for the execution of a 200MW (AC) solar power project at the GIPCL Renewable Energy Park, Khavda, Gujarat.

♦ **Pfizer launches new migraine drug in India; Rimegepant ODT promises 48-hour pain relief:**

The company has launched Rimegepant ODT in India for adults who don't respond to triptans. The fast-acting tablet offers up to 48-hour migraine relief and aims to reduce productivity loss nationwide.

♦ **HCLTech unveils physical AI innovation lab in collaboration with NVIDIA:**

The company has announced a partnership with NVIDIA, launching a Physical AI Innovation Lab in Santa Clara, California. The lab focuses on physical AI and cognitive robotics applications across industries, leveraging NVIDIA's core platforms. HCLTech brings solutions like VisionX, Kinetic AI, IEdgeX, and SmartTwin to help Global 2000 organizations scale their physical AI initiatives. The collaboration aims to address challenges in industrial automation and bridge the gap between digital simulation and real-world deployment.

♦ **Adani Defence to triple investment and expand ammo capacity to meet India's full demand:**

The company which has a USD1.2-1.5bn order pipeline, will increase total capex to Rs150bn after already deploying Rs50bn. The Group is planning to significantly scale up capacity in its defence and aerospace arm while also tripling its investment over the next few years.

♦ **WPIL's South Africa arm wins Rs4260mn water works contract:**

The company's South African subsidiary has received a contract from METSI KE MATLA JV for complete electro mechanical and instrumentation works for MCWAP2 project of Trans Caledon Tunnel Authority for a total value of 821m Rand (Rs4260mn); the project is expected to be commissioned in 48 months.

Source: Media Reports

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