

ITI Morning Boost

November 21, 2025

*All price's mentioned in report are based on previous day closing bases.

NIFTY – 26,192.15 (Daily Chart)



• In Thursday's trading session, the Nifty opened with a gap up and gradually moved northward, which helped the index close on a positive note.

• On the daily chart, a small bullish candle with equal wicks on both ends has formed, indicating balanced movement but with a positive bias. Importantly, the index managed to breach the horizontal resistance level of 26,070 and closed above it; this level will now act as a key support zone. The Nifty continues to maintain its bullish structure as it trades above the 20 DEMA. However, the RSI is inching toward the overbought zone, which warrants caution for the bulls.

• For Friday's trading session, 26,170 will act as the initial support level, while 26,230 will serve as the initial resistance level.

BANK NIFTY – 59,347.70 (Daily Chart)



- In Thursday's trading session, the banking index opened on a positive note and gradually moved northward, helping it close on a positive footing.

- On the daily chart, the index formed a Doji candle, reflecting indecision among market participants. Despite this, the broader structure remains bullish, with the index continuing to form higher highs and higher lows while holding above the 20 DEMA support. The only point of caution for bulls is that the RSI has now entered the overbought zone.

- For Friday's trading session, 59,300 will act as the initial support level, while 59,450 will serve as the initial resistance level.





TCS: TCS has announced a strategic partnership with global alternative asset management firm TPG to support the growth of its AI data center business, HyperVault. HyperVault aims to establish AI data centers with capacity in excess of a gigawatt and cater to the growing need for AI-ready data centers. TCS' HyperVault will be funded through a mix of equity from TCS and TPG, along with debt. Both partners combined will commit to investing up to Rs 18,000 crore over the next few years. Out of the total commitment, TPG will invest up to Rs 8,820 crore and is expected to have a final shareholding between 27.5% and 49% in HyperVault.

JSWENERGY: The Committee of Creditors has approved the resolution plan submitted by the company for Raigarh Champa Rail Infrastructure under the corporate insolvency resolution process, and the company has received a Letter of Intent from the Resolution Professional. The closure of the transaction will be subject to approval from the National Company Law Tribunal.

GODREJPROP: Godrej Skyline Developers, owned by Godrej Properties, has purchased a land parcel at Mauza Takli, Nagpur, from Kesar India for Rs 115.71 crore.

CMP- 3,144.80
IMPACT-**POSITIVE**

CMP- 504.85
IMPACT-**POSITIVE**

CMP- 2,123.80
IMPACT-**POSITIVE**



- In October, India's core sector stagnated, marking its lowest growth rate in over a year. The mining and electricity sectors took a notable hit, particularly with coal production plummeting. Additionally, there were drops in natural gas and crude oil outputs.
- India's exports are set for a strong showing in the rest of FY26. The first half of the fiscal year saw record quarterly exports. This momentum, combined with ongoing government support for exporters, points to continued success. India's total exports for the first half of FY26 reached \$418.9 billion, a significant increase from the previous year.
- India's foodgrain output touched a new high of 357.73 million tonnes in 2024-25, up 8% from 332.29 million tonnes a year earlier, government data showed. Agriculture Minister Shivraj Singh Chouhan said the rise reflects farmers' efforts and supportive policies such as higher MSP and procurement.

NIFTY50 TOP GAINERS

NIFTY50 TOP LOSERS

Company	Price	Change	%Gain		Company	Price	Change	%Gain
Eicher Motors	7,125.50	229	3.32		Asian Paints	2,859.80	-33.9	-1.17
Bajaj Finance	1,028.60	23	2.29		HCL Tech	1,645.40	-17.2	-1.03
Bajaj Finserv	2,095.60	45.4	2.21		Titan Company	3,902.40	-30.7	-0.78
Reliance	1,549.10	30.2	1.99		HUL	2,428.40	-13.2	-0.54
Tech Mahindra	1,456.00	22.1	1.54		Apollo Hospital	7,423.00	-36	-0.48

NIFTY200 TOP GAINERS

NIFTY200 TOP LOSERS

Company	Price	Change	%Gain		Company	Price	Change	%Gain
M&M Financial	346.6	16.8	5.08		Vodafone Idea	10.17	-0.52	-4.87
ABB Power	22,397	773	3.58		Biocon	395.15	-14.96	-3.65
Eicher Motors	7,126	229	3.33		Hyundai Motor India	2,337	-83.8	-3.47
Cummins India	4,376	114	2.69		Aurobindo Pharma	1,208	-28.1	-2.28
SRF	2,852	65.2	2.34		L&T Fin Holding	292.3	-5.35	-1.80



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OPEN INTEREST GAINERS

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
LTIM	6,036	52.50	0.88%	1050.3	-45.49%
NMDC	74.49	-0.71	-0.94%	156026.3	-44.99%
AXISBANK	1,283.70	14.80	1.11%	35402.5	-44.83%
COLPAL	2,185.10	2.40	0.11%	3691.1	-41.72%
RVNL	319.6	-1.05	0.16%	21088.4	-38.88%

INDEX HIGHEST OI

F&O Ban list	Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
SAIL	25/11/25	NIFTY	26,500	26,000	1.52
SAMMAANCAP	25/11/25	BANKNIFTY	60,000	58,000	1.23



FII & DII TRADING ACTIVITY CASH

Date	FII Rs Crores			DII Rs Crores		
	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	1,85,217.80	1,97,292.74	-12,074.94	2,21,109.16	1,69,949.61	51,159.55
20-Nov-25	14,769.74	14,486.09	283.65	13,051.84	12,227.38	824.46
19-Nov-25	14,774.92	13,194.20	1,580.72	13,904.32	12,544.05	1,360.27
18-Nov-25	17,071.04	17,799.86	-728.82	18,246.17	12,089.34	6,156.83
17-Nov-25	13,339.02	12,896.85	442.17	12,975.94	11,510.08	1,465.86

FII & DII TRADING ACTIVITY STOCK F&O

Date	FII Stock Fut			FII Stock Opt		
	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	389808.65	394076.79	-4268.14	435124.03	435236.06	-112.03
20-Nov-25	140518.47	139852.92	665.55	53744.22	52897.52	846.7
19-Nov-25	21556.71	20374.61	1182.1	48228.03	48035.89	192.14
18-Nov-25	17216.92	19657.23	-2440.31	40051.54	40211.63	-160.09
17-Nov-25	17596	18520.89	-924.89	32438.29	32571.45	-133.16



*Data in above table is based on previous day closing bases.

TOP SECTORS PERFORMANCE OF THE DAY

Name	Daily (%)	1 Week (%)	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%)
Ship Building	2.33	2.44	25.67	49.13	80.3	36.6
Computer Education	1.78	-1.7	-6.12	-12.65	-17.85	-30.71
Financial Services	1.29	-0.07	1.16	3.36	5.11	9.6
Aerospace & Defence	1.03	-1.35	-1.93	8.98	9.87	39.25
Air Transport Service	0.93	-3.43	-8.95	-10.75	-8.73	10.43



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UPCOMING ECONOMIC EVENTS

Friday, November 21, 2025	Country	Event's	Forecast		Previous
20:15	US	S&P Global Manufacturing PMI (Nov)	52.0		52.5
20:15	US	S&P Global Services PMI (Nov)	54.6		54.8
Tuesday, November 25, 2025					
12:30	EU	German GDP (QoQ) (Q3)			
19:00	US	Core Retail Sales (MoM) (Sep)			0.7%
19:00	US	PPI (MoM) (Sep)			-0.1%
19:00	US	Retail Sales (MoM) (Sep)			0.6%
20:30	US	CB Consumer Confidence (Nov)			94.6
19:00	US	Durable Goods Orders (MoM) (Sep)			2.9%

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