PCJ HOLDINGS

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Daily Pre-Market News Tracker
Wednesday, 18 November 2026

"Twelve of twelve, and ten of ten."

— a note on Tuesday

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Every Stock in Two Sectors Rose. The Small Caps Still Fell.

On Tuesday every stock in the PSU Bank and Realty indices closed higher, the Nifty 50 added 0.38%, and the Smallcap 100 still fell. Nifty PSU Bank rose 1.95% on all twelve of its constituents and Nifty Realty 1.94% on all ten - the only two of the fifteen sectoral indices with no decliner at all - while Nifty Bank rose 1.13% on twelve of fourteen to the highest close this page has recorded. ELEVEN OF THE FIFTEEN SECTORALS ROSE. But twenty-three of the fifty benchmark constituents fell, the Smallcap 100 lost 0.22% on fifty-seven of its hundred names, and overnight Wall Street fell for a fourth consecutive session before Nvidia beat after the bell.

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01

Global Market Setup

TWO SECTORS ROSE WITHOUT A SINGLE FALLER. The Nifty 50 rose 96.30 points or 0.38% to 25,387.40 and the Sensex 427.40 points or 0.52% to 82,532.19, on twenty-seven constituents up against twenty-three. NIFTY PSU BANK ROSE 1.95% ON ALL TWELVE OF ITS CONSTITUENTS AND NIFTY REALTY 1.94% ON ALL TEN - the only two of the fifteen sectoral indices with no decliner at all. Nifty Bank rose 1.13% to 62,273.25 on twelve of fourteen, and the exchange's own fifty-two-week high for the index is Tuesday's own intraday high. Eleven of the fifteen sectorals rose; Information Technology was weakest at 0.90% lower. The Nifty 500 rose 0.29% on 257 advances against 242, BUT THE SMALLCAP 100 FELL 0.22%. India VIX 15.52. FII +Rs 4,195.38 crore and DII +Rs 196.93 crore, both buying. OVERNIGHT WALL STREET FELL FOR A FOURTH SESSION and Nvidia then beat after the bell.

Nifty 50 (Prev. Close)

25,387.40

+0.38% (Tue, +96.30 pts)

27 up, 23 down. A second consecutive gain

Sensex (Prev. Close)

82,532.19

+0.52% (Tue, +427.40 pts)

BSE index, not in the NSE file. Two sources agree

Nifty Bank (Prev. Close)

62,273.25

+1.13% (Tue, +697.35 pts)

12 of 14 up. The year high is Tuesday's own high

Nifty PSU Bank (Tue)

9,486.60

+1.95% (Tue, +181.30 pts)

All twelve constituents higher. Best of fifteen

Nifty Realty (Tue)

926.50

+1.94% (Tue, +17.60 pts)

All ten constituents higher. Second of fifteen

Nifty IT (Tue)

31,654.10

-0.90% (Tue, -286.95 pts)

3 up, 7 down. Weakest of the fifteen

India VIX (Tue)

15.52

-1.00% (Tue, -0.16 pts)

An intraday low of 14.04 sits far beneath it

Rupee (Tue close)

93.51

+43 paise (Tue)

Reported a seven-month high. Provisional settlement

Indian index levels, points changes, percentages, the earnings and book multiples and every internal advance and decline count are from NSE's own official dated close file for Tuesday 17 November 2026 and from the exchange's own per-index feed, both read at 08:43 hours IST today. The Sensex is a BSE index and is not in that file. The rupee is a provisional settlement reported by a news agency, not an exchange close.

02

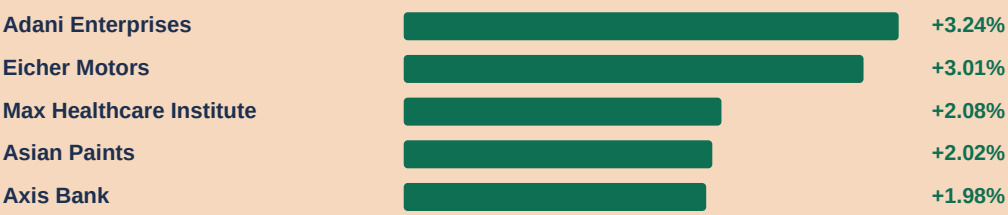
Sectors, Movers, Flows and Breadth

Sectoral indices, prior session



NSE index family, Tuesday 17 November closes from the exchange's own official dated file. Eleven of the fifteen sectoral indices rose and four fell. PSU Bank and Realty were the only two with no declining constituent.

Top gainers



Top losers



Tuesday 17 November closes, Nifty 50 constituents only. Two independent closing wraps name the same five gainers and the same five losers. THE DISPUTE IS PRINTED RATHER THAN HIDDEN: a third source quoting BSE prices for Sensex constituents puts Mahindra and Mahindra at about 2.04% higher, which would place it inside this list, and gives Axis Bank and Asian Paints percentages that differ from the two above. NSE's official dated file carries index levels, not individual stock prices, so this page could not settle the difference against the exchange and does not claim the ranks below the top two are exhaustive.

Market breadth, prior session



ADVANCES DECLINES UNCHANGED

NSE's own per-index constituent counts for the Tuesday 17 November session, read from the exchange's feed at 08:43 hours IST today, before the pre-open roll makes them unrecoverable. The Nifty 500 also had two unchanged.

Valuation context

NIFTY 50 P/E	NIFTY 50 P/B
20.68	3.11
17 Nov close, NSE official dated file	*17 Nov close, same file*

The earnings and book multiples are NSE's own, carried as columns in its official dated close file for Tuesday 17 November 2026. THE DIVIDEND YIELD IN THE SAME FILE IS WITHHELD FOR A TWENTY-FIFTH CONSECUTIVE SESSION, as it has been since 13 October, because the published series has not survived this page's two internal consistency tests often enough to be printed. No cause is asserted and no correction has been published by the exchange.

WHAT THE DATA SHOWS

Tuesday was a narrow, bank-led session with two sectors that nothing at all pulled down, and an overnight that cuts the other way. TWO SECTORAL INDICES ROSE WITHOUT A SINGLE DECLINER. Nifty PSU Bank rose 181.30 points or 1.95% to 9,486.60 with all twelve of its constituents higher, and Nifty Realty rose 17.60 points or 1.94% to 926.50 with all ten higher.

No other sectoral index was unanimous. Eleven of the fifteen rose and four fell.

Information Technology was weakest at 0.90% lower, on three constituents up against seven, taking its cue from the overnight American technology tape. THE BENCHMARK ROSE AND THE SMALL END DID NOT FOLLOW. The Nifty 50 rose 96.30 points or 0.38% to 25,387.40 on twenty-seven constituents against twenty-three, and the Sensex rose 427.40 points or 0.52% to 82,532.19.

The Nifty 500 rose 0.29% to 23,822.30 on 257 advances against 242 and two unchanged, so the broad index's own participation was marginally positive - but THE SMALLCAP 100 FELL 0.22% to 19,398.70 on fifty-seven of its hundred constituents. The Midcap 100 rose 0.25% on fifty-four against forty-six, the MidSmallcap 400 rose 0.14% on 203 against 197, and the Next 50 rose 0.28%.

A separate market-wide count of 2,012 advances against 2,148 declines is in circulation; it names no exchange and is not printed here as data. THE BANK RECORD, STATED PRECISELY. Nifty Bank rose 697.35 points or 1.13% to 62,273.25 with twelve of its fourteen constituents higher.

It is reported as a record close, and that characterisation is attributed rather than asserted. What the exchange's own feed does show is that the index's fifty-two-week high, 62,442.20, is Tuesday's own intraday high - so the highest price of the last year was made in that session.

On 16 November this page printed the opposite case: a close reported as a record while the year high sat 188.95 points above it. The two days are different and are described differently.

FLOWS TURNED THE SAME WAY FOR THE FIRST TIME THIS MONTH. Foreign institutions bought a net Rs 4,195.38 crore in the cash segment and domestic institutions a net Rs 196.93 crore, both from the exchange's own provisional report. Domestic institutions are reported to have sold on every earlier session of November, which would make Tuesday their first net purchase of the month; that count is from a compilation, not from the exchange, and is attributed.

November foreign inflows are reported at over Rs 84,000 crore, described as the heaviest monthly buying since 2002, though a second outlet carries a materially higher dollar figure for the same month, so only the rupee figure is printed. THEN THE OVERNIGHT, WHICH PULLED IN TWO DIRECTIONS. The Dow Jones Industrial Average fell 848.75 points or 1.64% to 50,759.42, the S&P; 500 fell 1.03% to 7,340.53 and the Nasdaq Composite 0.74% to 24,328.38 - a fourth consecutive decline for the latter two, reported as their first four-day losing run since September.

After the bell Nvidia reported revenue of 115.8 billion dollars, up 103% on a year earlier and above the consensus its own reporting cites, with quarterly guidance also above consensus; its shares traded about 3.9% higher after hours, which is an after-hours print and not a close. The company's board chair is reported to have said the board does not intend to reinstate the former chief executive. NO REASON FOR THAT DEPARTURE HAS BEEN GIVEN BY THE COMPANY AND NONE IS STATED HERE. GIFT Nifty was 25,240.50 at 08:41, 110.00 points or 0.43% below its own prior settlement; the feed was tested twice and proved live.

03

Stocks in the News

THE SESSION

Every Stock in Two Sectors Rose. The Small Caps Still Fell.

On Tuesday 17 November the Nifty 50 rose 96.30 points or 0.38% to 25,387.40 and the Sensex 427.40 points or 0.52% to 82,532.19, on TWENTY-SEVEN CONSTITUENTS UP AGAINST TWENTY-THREE. NIFTY PSU BANK ROSE 1.95% ON ALL TWELVE OF ITS CONSTITUENTS AND NIFTY REALTY 1.94% ON ALL TEN - the only two of the fifteen sectoral indices in which nothing fell. Eleven of the fifteen rose. Beneath the benchmark the picture was mixed rather than weak: the Nifty 500 rose 0.29% to 23,822.30 on 257 advances against 242 and two unchanged, the Midcap 100 rose 0.25% on fifty-four against forty-six and the MidSmallcap 400 rose 0.14% on 203 against 197 - but THE SMALLCAP 100 FELL 0.22% to 19,398.70 on fifty-seven of its hundred constituents. The Next 50 rose 0.28% to 72,693.00.

Levels, points changes, percentages, the intraday range and every internal count are from NSE's own official dated close file and per-index feed for Tuesday 17 November 2026, read at 08:43 hours IST today. The Sensex is a BSE index, not in that file; the sources line explains how it is sourced.

BANKS

The Year High Is Tuesday's Own High

Nifty Bank rose 697.35 points or 1.13% to 62,273.25 with TWELVE OF ITS FOURTEEN constituents higher, the highest close this page has recorded for the index. It is reported as a record close and that characterisation is attributed, not asserted. WHAT THE EXCHANGE'S OWN FEED DOES SHOW IS THAT THE INDEX'S FIFTY-TWO-WEEK HIGH, 62,442.20, IS TUESDAY'S OWN INTRADAY HIGH - so the highest price of the past year was made in that session. That is the opposite of the case this page printed for 16 November, when a close reported as a record sat 188.95 points below the year high and no intraday record had been set. Nifty PSU Bank rose 1.95% with every one of its twelve constituents higher and Nifty Private Bank 0.89% on eight of ten. Nifty Financial Services rose 0.64% on thirteen of twenty.

Index levels, points changes, percentages, internal counts and the fifty-two-week high are from NSE's own dated close file and per-index feed for Tuesday 17 November 2026. A fifty-two-week high is not an all-time high and is not described as one here.

FLOWS

Both Sides Bought on the Same Day

Foreign institutions bought a net Rs 4,195.38 crore in the cash segment on Tuesday and domestic institutions a net Rs 196.93 crore, both figures from the exchange's own provisional report read this morning. THE GROSS LEGS FOR TUESDAY ARE IN THE SAME REPORT: foreign institutions bought Rs 19,930.98 crore against sales of Rs 15,735.60 crore, and domestic institutions bought Rs 14,903.80 crore against sales of Rs 14,706.87 crore. ON THE PREVIOUS SESSION DOMESTIC INSTITUTIONS SOLD Rs 3,519.05 CRORE, so the direction reversed. Domestic institutions are reported to have been net sellers on every earlier session of November, which would make Tuesday their first net purchase of the month; THAT COUNT IS FROM A COMPILATION AND NOT FROM THE EXCHANGE, and it is attributed rather than asserted. Foreign inflows for November to date are reported at over Rs 84,000 crore and described as the heaviest monthly buying since 2002. A second outlet carries a materially higher dollar figure for the same period, so only the rupee figure is printed here.

Both net figures are from NSE's own provisional foreign and domestic institutional cash report for Tuesday 17 November 2026, read at 08:43 hours IST today. The gross legs are from the same Tuesday 17 November report: foreign institutions bought Rs 19,930.98 crore and sold Rs 15,735.60 crore, domestic institutions bought Rs 14,903.80 crore and sold Rs 14,706.87 crore. The month-to-date figure and the streak count are attributed to secondary reporting.

04

Earnings & Corporate Radar

Nothing domestic is scheduled; the overnight result is the one that matters

Nvidia reported after the American close and beat on revenue and guidance

Revenue of 115.8 billion dollars, reported as 103% higher than a year earlier and above the consensus its own reporting cites; earnings per share of 2.68 dollars; data-centre revenue of 107.6 billion dollars; and quarterly guidance of 127.4 to 132.6 billion dollars, also above consensus. The shares traded about 3.9% higher after hours, WHICH IS AN AFTER-HOURS PRINT AND NOT A CLOSE. The company's board chair is reported to have said the board does not intend to reinstate the former chief executive.

THESE FIGURES ARE PRESS-SOURCED, NOT READ FROM THE COMPANY'S OWN FILING, and the date of the release is given only as after Tuesday's American close because no source read this morning stated it independently. NO REASON FOR THE CHIEF EXECUTIVE'S DEPARTURE HAS BEEN GIVEN BY THE COMPANY AND NONE IS STATED HERE. No Indian company is scheduled to report today. The corporate panel carries post-close announcements at one remove - the exchanges' own announcement pages were not read directly this morning, so items may be missing.

Corporate announcements since the last close

Company	Announcement
IIFL Finance	Fairfax is reported to be exiting the company in full through a block deal of about Rs 3,454 crore at Rs 611 a share, with today given as the trade date. The reported purpose is to help fund its Rs 52,878 crore purchase of IDBI Bank. A confirmed overnight supply event in a listed name is the kind of item that moves a stock at the open.
IDBI Bank	The United Forum of IDBI Officers and Employees is reported to have written to the Reserve Bank Governor asking it to withhold approvals for the sale to Fairfax, and to have called a one-day nationwide strike on 3 December. Execution risk on the largest pending bank privatisation, reported at one remove.
Brokers and exchanges	A news-agency report carried on 17 November says the securities regulator is weighing restrictions on fresh margin-funded purchases, targeting stocks where leverage exceeds a threshold tied to free float, with an earlier plan to widen the facility on hold. NO OFFICIAL STATEMENT OR CONSULTATION PAPER IS CITED; this is a report, not a decision.
Margin funding, the size of it	The same report puts outstanding margin funding at Rs 1.53 lakh crore, 30.6% higher than a year earlier and close to double the end-2024 figure, with at least thirty-six stocks carrying positions above 10% of free float and more than 220 above 5%. Mid, small, micro and nano caps are put at about 56% of the book, or Rs 85,919 crore. Figures as reported, not verified against the regulator.
Tata Sons	The Reserve Bank is reported to have restated that its directions for upper-layer non-banking financial companies, including the listing requirement, apply to the company. A continuing standoff rather than a new development.

Company	Announcement
NBFCs generally	The Reserve Bank is reported to have cancelled forty-nine non-banking financial company registrations through October orders, and to be considering whether a private equity firm may control more than one such company, with control assessed through governance rights rather than shareholding alone. Not yet a draft regulation.
YES Bank	The Reserve Bank is reported to have moved a review petition in the Supreme Court against the additional tier-one bond ruling. This page carried the bank's own review petition on 17 November; the regulator's is a separate filing, reported at one remove.
Crystal Crop Protection	The mainboard initial public offering is reported to open today, with the anchor book done at the top of the price band. This page prints no unofficial pre-listing price indication for any issue.
Pharmaceuticals	This page carried a regulatory search at a pharmaceutical constituent on 17 November. No further disclosure on it was found this morning; the absence of news is not the same as a resolution.
A note on this panel	Every item above is secondary reporting. The exchanges' own corporate announcement pages were not readable this morning, so post-close filings may be missing from this list, and nothing here should be taken as a complete record of what was disclosed.

05

Global & Macro Factors

A. Two Sectors With No Decliner At All

■ NIFTY PSU BANK ROSE 1.95% ON ALL TWELVE OF ITS CONSTITUENTS AND NIFTY REALTY 1.94% ON ALL TEN. No other sectoral index was unanimous.

■ ELEVEN OF THE FIFTEEN SECTORAL INDICES ROSE AND FOUR FELL. Information Technology was weakest at 0.90% lower on three constituents up against seven.

■ THE NIFTY 50 ROSE 0.38% ON TWENTY-SEVEN CONSTITUENTS AGAINST TWENTY-THREE, a second consecutive gain on this page's chain.

■ THE SMALLCAP 100 FELL 0.22% ON FIFTY-SEVEN OF ITS HUNDRED NAMES while the Nifty 500 rose 0.29% on 257 advances against 242. The small end did not follow.

B. A Bank Record, Stated Precisely

■ NIFTY BANK ROSE 1.13% TO 62,273.25 ON TWELVE OF ITS FOURTEEN CONSTITUENTS, the highest close this page has recorded.

■ THE EXCHANGE'S OWN FIFTY-TWO-WEEK HIGH FOR THE INDEX, 62,442.20, IS TUESDAY'S OWN INTRADAY HIGH. The highest price of the past year was made in that session.

■ THAT IS THE OPPOSITE OF 16 NOVEMBER, when the close reported as a record sat 188.95 points below the year high and no intraday record had been set. The two days are described differently because they are different.

■ A FIFTY-TWO-WEEK HIGH IS NOT AN ALL-TIME HIGH and is not described as one on this page.

C. Flows Turned the Same Way

■ FOREIGN INSTITUTIONS BOUGHT A NET Rs 4,195.38 CRORE AND DOMESTIC INSTITUTIONS A NET Rs 196.93 CRORE, both from the exchange's own provisional report.

■ DOMESTIC INSTITUTIONS SOLD Rs 3,519.05 CRORE ON THE PREVIOUS SESSION. The reversal is the fact; the claim that it is their first net purchase of November is attributed to a compilation, not to the exchange.

■ NOVEMBER FOREIGN INFLOWS ARE REPORTED AT OVER Rs 84,000 CRORE, described as the heaviest monthly buying since 2002. A second outlet carries a materially higher dollar figure for the same period, so only the rupee figure is printed.

■ THE RUPEE IS REPORTED TO HAVE SETTLED AT 93.51, 43 paise firmer and a seven-month high. Two outlets carry different figures of 93.47 and 93.48; the one printed is the one two sources describe as a settlement.

D. The Overnight Cut the Other Way, Then Turned

■ THE DOW FELL 1.64% TO 50,759.42, THE S&P; 500 1.03% TO 7,340.53 AND THE NASDAQ COMPOSITE 0.74% TO 24,328.38 - reported as a fourth consecutive decline for the latter two.

■ NVIDIA THEN BEAT AFTER THE BELL on revenue, earnings and guidance, and its shares traded about 3.9% higher after hours. That is an after-hours print, not a close.

■ MARKET PRICING REPORTED FROM A FUTURES EXCHANGE'S OWN TOOL PUTS THE ODDS OF A 25 BASIS POINT UNITED STATES RATE INCREASE ON 9 DECEMBER AT 95.4%. That is a description of pricing, not a forecast by this page.

■ FEDERAL RESERVE MEETING MINUTES ARE PUBLISHED TONIGHT, after Indian hours. GIFT Nifty was 25,240.50 at 08:41, 0.43% below its own prior settlement, on a feed tested twice and proved live.

06

Today's Watchlist

Watch	Why it matters
Whether the small end rejoins the benchmark	The Nifty 50 rose 0.38% on Tuesday while the Smallcap 100 fell 0.22% on fifty-seven of its hundred constituents. The Nifty 500's own internal count was marginally positive at 257 against 242, so this is a small-cap divergence rather than a broad one.
Whether the two unanimous sectors hold their bid	Nifty PSU Bank rose 1.95% with all twelve constituents higher and Nifty Realty 1.94% with all ten. Unanimity is rare and says nothing about what follows, but it marks where Tuesday's demand was concentrated.
Whether Indian technology names follow Nvidia's after-hours print or Wall Street's close	Nifty IT fell 0.90% on Tuesday, the weakest of the fifteen sectorals, after the American close fell for a fourth session. Nvidia then beat after the bell and traded about 3.9% higher after hours.
Whether both institutional sides keep buying	Foreign institutions bought a net Rs 4,195.38 crore on Tuesday and domestic institutions a net Rs 196.93 crore, after the domestic side had sold Rs 3,519.05 crore the session before.
The reported margin-funding review	A news-agency report says the regulator is weighing restrictions on fresh margin-funded purchases. No official statement or consultation paper is cited. Broking and exchange names, and the smaller stocks most funded that way, are where it would land.

The day planner

Time (IST)	Event
09:15	NSE and BSE regular trading opens. NO DERIVATIVES EXPIRY TODAY - the next NSE expiry is the November monthly on Monday 23 November
Today	Finance Minister's pre-Budget consultation with the capital market, banking and insurance sectors - the one scheduled domestic event of the session. Unemployment rate and coal production and dispatch data are also published
Today	Crystal Crop Protection mainboard initial public offering opens, as reported. IIFL Finance block deal trade date, as reported
Tonight	UNITED STATES FEDERAL RESERVE MEETING MINUTES, about 00:30 IST on Thursday - after Indian hours, so a Thursday-open input
Thursday 19 November	Sensex weekly derivatives expiry on the BSE. United States weekly jobless claims
Friday 20 November	Reserve Bank weekly foreign exchange reserves for the week ended 13 November. Eight-core-industries output. House price index

Time (IST)	Event
Monday 23 November	NOVEMBER MONTHLY DERIVATIVES EXPIRY ON THE NSE, moved here from Tuesday 24 November. Rule-derived and corroborated by a live contract page and by the GIFT contract's own expiry date, which reads 23 November; no NSE circular confirming it has been read
Tuesday 24 November	EXCHANGES CLOSED for Prakash Gurpurb Sri Guru Nanak Dev. The next closure after that is Friday 25 December
Wednesday 25 November	Flash report on projects of Rs 150 crore and above, for October
Thursday 26 November	Bank deposit and bank credit growth. Sensex November monthly expiry on the BSE, unaffected by the holiday
Monday 30 November	QUARTERLY GROSS DOMESTIC PRODUCT for July to September - the largest scheduled macro release of the next fortnight. MSCI's November review changes take effect at the close the same day
2 to 4 December	Reserve Bank Monetary Policy Committee, with the decision expected on 4 December

07

Global and Geopolitical Factors

Wall Street fell for a fourth session, then Nvidia beat after the bell

What was reported: The Dow Jones Industrial Average fell 848.75 points or 1.64% to 50,759.42, the S&P; 500 fell 1.03% to 7,340.53 and the Nasdaq Composite 0.74% to 24,328.38 - reported as a fourth consecutive decline for the latter two and their first four-day run of losses since September, with essentially every sector lower. After the close Nvidia reported revenue of 115.8 billion dollars, up 103% on a year earlier, with earnings and quarterly guidance also above the consensus its own reporting cites; the shares traded about 3.9% higher after hours, which is an after-hours print and not a close. The board chair is reported to have said the board does not intend to reinstate the former chief executive. NO REASON FOR THAT DEPARTURE HAS BEEN GIVEN BY THE COMPANY AND NONE IS STATED HERE.

United States rate expectations have hardened and the minutes land tonight

What was reported: Market pricing reported from a futures exchange's own tool puts the probability of a 25 basis point increase in the American policy rate on 9 December at 95.4%, with more than 80 basis points of tightening priced by September 2027 against about 50 a week earlier. The ten-year Treasury yield is reported above 5%. THIS PAGE IS DESCRIBING PRICING, NOT FORECASTING A DECISION. Minutes of the 27 and 28 October meeting are published about 00:30 IST tonight, after Indian hours.

The rupee is reported at a seven-month high on record monthly foreign buying

What was reported: The rupee is reported to have settled at 93.51 to the dollar on Tuesday, 43 paise firmer and its biggest single-day gain since April. Two other outlets carry 93.47 and 93.48 for the same session; the figure printed is the one two sources describe as a settlement. Foreign inflows into Indian equities for November to date are reported at over Rs 84,000 crore, described as the heaviest monthly buying since 2002, with a further sum reported into domestic debt. A second outlet gives a materially higher dollar figure for the same month, so only the rupee figure appears here.

Asian markets closed broadly lower on Tuesday

What was reported: On Tuesday the Nikkei 225 fell 1.34%, the Kospi 2.59%, the Taiwan Weighted index 2.31%, the S&P;/ASX 200 1.79%, the Hang Seng 1.03% and the Shanghai Composite 0.50%, with artificial-intelligence and chip names the common drag; the Kospi is reported to have closed below 5,000 for the first time since February. EVERY ASIAN FIGURE ON THIS PAGE IS A TUESDAY CLOSE. Asian markets are trading while this page is read and no live quote from them is printed as data.

08

Closing Note

Tuesday 17 November was a narrow, bank-led session. The Nifty 50 rose 96.30 points or 0.38% to 25,387.40 with TWENTY-SEVEN constituents higher and twenty-three lower, and the Sensex rose 427.40 points or 0.52% to 82,532.19. The Nifty 500 rose 0.29% to 23,822.30 on 257 advances against 242 and two unchanged, the Midcap 100 rose 0.25% to 61,730.00 on fifty-four against forty-six, the MidSmallcap 400 rose 0.14% to 20,867.25 on 203 against 197 and the Next 50 rose 0.28% to 72,693.00 on twenty-seven against twenty-two.

THE SMALLCAP 100 FELL 0.22% TO 19,398.70 on forty-three constituents against fifty-seven. ELEVEN OF THE FIFTEEN SECTORAL INDICES ROSE AND FOUR FELL: PSU Bank 1.95% to 9,486.60, Realty 1.94% to 926.50, Bank 1.13% to 62,273.25, Private Bank 0.89% to 30,512.15, Auto 0.72% to 27,769.15, Financial Services 0.64% to 28,195.00, Media 0.64% to 1,774.65, Metal 0.58% to 12,530.30, Oil and Gas 0.44% to 11,410.60, Healthcare 0.38% to 17,233.20 and Pharma 0.21% to 28,157.10. The four that fell were FMCG 0.20% lower to 47,611.60, Consumer Durables 0.24% to 38,493.90, Energy 0.27% to 37,176.70 and Information Technology 0.90% to 31,654.10. India VIX fell 0.16 points or 1.00% to 15.52.

The intraday shape, which only the exchange's dated file carries, was a climb that gave part of itself back. NSE's file records an open of 25,277.30, a high of 25,501.35 and a low of 25,267.30 against the close of 25,387.40, on turnover of Rs 32,288.19 crore - a 234-point range, and a close 113.95 points below the high. NIFTY BANK'S OWN HIGH, 62,442.20, IS ALSO THE FIFTY-TWO-WEEK HIGH THE EXCHANGE'S FEED CARRIES FOR THE INDEX, so the highest price of the past year was made in that session; the close sits 168.95 points under it.

INDIA VIX AGAIN RECORDS THE ODDEST NUMBER IN THE FILE: an intraday low of 14.04 against a close of 15.52 and a high of 15.68 - which is exactly Monday's closing level, so the index spent Tuesday beneath where it ended the session before - a low nearly a point and a half under the close on a day the index fell 1.00%. The same shape appeared on 16 November. It is recorded, not explained.

Foreign institutions bought a net Rs 4,195.38 crore in the cash segment and domestic institutions a net Rs 196.93 crore, both from the exchange's own provisional report read this morning; the domestic side had sold Rs 3,519.05 crore on the previous session. The gross legs from the same Tuesday report are published and are printed here: foreign institutions bought Rs 19,930.98 crore and sold Rs 15,735.60 crore, domestic institutions bought Rs 14,903.80 crore and sold Rs 14,706.87 crore. AN EARLIER BUILD OF THIS EDITION SAID THEY WERE NOT PUBLISHED. That came from the 06:45 research run's note and was not checked against this page's own 08:43 pull, which carried them; the sentence is corrected here rather than removed.

The claim that this is the domestic side's first net purchase of November comes from a compilation rather than the exchange and is attributed. The rupee is reported to have settled at 93.51, 43 paise firmer and a seven-month high, with two other outlets carrying 93.47 and 93.48 for the same session. November foreign inflows are reported at over Rs 84,000 crore; a second outlet gives a materially higher dollar figure for the same month, so only the rupee figure appears.

Overnight the Dow Jones Industrial Average fell 1.64% to 50,759.42, the S&P; 500 1.03% to 7,340.53 and the Nasdaq Composite 0.74% to 24,328.38, and Nvidia then beat after the bell on revenue, earnings and guidance. GIFT Nifty was 25,240.50 at 08:41 this morning, 110.00 points or 0.43% below its own prior settlement, on a feed pulled twice minutes apart whose timestamp and contracts-traded count both advanced - so it is a live reading, not a frozen one. WHAT IS NOT PRINTED: no Brent or West Texas settlement, because no source read this morning carried a Tuesday settlement rather than a spot quote; no United States ten-year close, because the official Treasury curve has not been updated; no dividend yield, for a twenty-fifth consecutive session; no policy rate for India; no live Asian quote; and no unofficial pre-listing price indication for any issue.

09

PCJ Apps & How to Reach Us

Everything in this tracker is background. The account, the holdings and the transactions live in the PCJ apps. Scan a code below with your phone camera to open the store listing for your device. Both apps are published by PCJ Holdings Private Limited; if a listing does not show that publisher name, it is not ours.

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Store links verified against www.pcjholdings.in/apps and both store listings on 4 September 2026; publisher on each listing reads PCJ Holdings. PCJ communicates only through its official channels - beware of look-alike apps, websites or WhatsApp accounts claiming association with PCJ Holdings. Downloading an app is not investment advice and does not constitute a recommendation to transact.

10 Key Disclosures

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Sources used in this edition:

Indian index levels, points changes, percentages, the earnings and book multiples, the intraday open, high, low and turnover, the fifty-two-week high for Nifty Bank and every internal advance and decline count are taken from NSE's own official dated close file for Tuesday 17 November 2026 and from the exchange's own per-index feed, both read at 08:43 hours IST today, before the pre-open roll. The foreign and domestic institutional net figures AND THEIR GROSS PURCHASE AND SALE LEGS are from the exchange's own provisional cash report, read in the same pass. A FIRST BUILD OF THIS EDITION SAID THE GROSS LEGS WERE NOT PUBLISHED, carrying forward a note from the 06:45 research run without checking it against this page's own 08:43 pull, which carried them. Corrected before the figures could stand uncorrected, and recorded here rather than quietly fixed. No derivatives ban list is printed today because the exchange's own ban endpoint returned 404 when it was read this morning, and this page does not print one it has not read. THE SENSEX IS A BSE INDEX AND IS NOT IN THAT FILE: 82,532.19 is copied character for character from two independent closing wraps that agree to the paisa, and a third source rounds to the same figure. A MARKET-WIDE BREADTH COUNT OF 2,012 ADVANCES AGAINST 2,148 DECLINES IS IN CIRCULATION AND IS NOT PRINTED HERE AS DATA, because its source names no exchange; the per-index counts above are the exchange's own, and they point the other way for the Nifty 500. THE NIFTY 50 GAINER AND LOSER RANKS BELOW THE TOP TWO ARE DISPUTED: a third source quoting BSE prices puts Mahindra and Mahindra at about 2.04% higher, which would place it inside the list, and gives two other names different percentages. NSE's dated file carries index levels and not individual stock prices, so the difference could not be settled against the exchange and the list is not claimed to be exhaustive. THE DIVIDEND YIELD IS WITHHELD FOR A TWENTY-FIFTH CONSECUTIVE SESSION. Both of this page's tests were run on the Tuesday file against Monday's, across the 169 indices present in both. The same-direction test was meaningful - thirty-four indices moved more than 0.5% - and three of them moved their published yield the same way as their price, which an unchanged dividend base does not allow. The second test was clean: none of the forty-eight near-flat indices moved its yield more than 2%. The Nifty 50's own yield fell 1.46% on a 0.38% price gain, nearly four times the move an unchanged base implies. One test broken on a tape that could judge it, one clean. No cause is asserted and the exchange has published no notice, effective date or erratum. The Nvidia result figures are press-sourced and were not read from the company's filing; no reason for its chief executive's departure has been given by the company and none is stated here. United States and Asian index closes are from wire copy for the Tuesday sessions, each labelled with that date; no live Asian quote is printed. GIFT Nifty was pulled twice minutes apart at 08:39 and 08:41 and both its timestamp and its contracts-traded count advanced, so the reading is live. The rupee figure is a provisional settlement reported by a news agency, not an exchange close, and two other figures circulate. Every corporate item is secondary reporting; the exchanges' own announcement pages were not readable this morning.