PCJ HOLDINGS

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Daily Pre-Market News Tracker
Friday, 20 November 2026

"Fifteen of fifteen, fourteen of fourteen, and one index lower."
— a note on Thursday

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One of the Fifteen Fell.

On Thursday fourteen of the fifteen sectoral indices rose, five of them without a single decliner, and the Nifty 50 closed at its high. The benchmark rose 286.35 points or 1.14% to 25,514.30 on forty-two constituents up against eight, and the Sensex rose 1.21% to 83,021.75. NIFTY AUTO ROSE 4.40% ON ALL FIFTEEN OF ITS CONSTITUENTS, Consumer Durables 3.64% on all fourteen - reversing Wednesday's 3.13% fall - and Nifty Bank 1.65% on all fourteen, to a level that equals the fifty-two-week high the exchange carries for it. Information Technology was the only faller. India VIX rose 3.50% even so, and overnight the Dow fell 2.19% and the Nasdaq Composite 2.25%.

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01

Global Market Setup

ONE OF THE FIFTEEN SECTORAL INDICES FELL. The Nifty 50 rose 286.35 points or 1.14% to 25,514.30 on FORTY-TWO constituents up against eight, AND CLOSED AT ITS OWN HIGH FOR THE SESSION. The Sensex rose 989.94 points or 1.21% to 83,021.75. FIVE SECTORAL INDICES ROSE WITHOUT A SINGLE DECLINER: Auto on all fifteen of its constituents, Bank and Consumer Durables on all fourteen, PSU Bank on all twelve and Private Bank on all ten. NIFTY AUTO ROSE 4.40% and Consumer Durables 3.64%, reversing Wednesday's 3.13% fall. Nifty Bank rose 1.65% to 63,063.00, which is also the fifty-two-week high the exchange carries for it. Information Technology was the only faller, 1.10% lower. India VIX rose 3.50% to 16.11 even so. FII +Rs 7,411.41 crore against DII -Rs 1,356.57 crore. OVERNIGHT WALL STREET FELL HARD: the Dow 2.19% and the Nasdaq Composite 2.25%.

Nifty 50 (Prev. Close)
25,514.30
+1.14% (Thu, +286.35 pts)
42 up, 8 down. Closed at the session high

Sensex (Prev. Close)
83,021.75
+1.21% (Thu, +989.94 pts)
BSE index, not in the NSE file

Nifty Bank (Prev. Close)
63,063.00
+1.65% (Thu, +1,024.35 pts)
All fourteen up. Equals the year high on file

Nifty Auto (Thu)
28,601.30
+4.40% (Thu, +1,206.35 pts)
All fifteen constituents up. Best of fifteen

Nifty IT (Thu)
30,919.45
-1.10% (Thu, -342.85 pts)
3 up, 7 down. The only sectoral faller

India VIX (Thu)
16.11
+3.50% (Thu, +0.55 pts)
Rose on a day the benchmark gained 1.14%

Rupee (Thu close)
93.32
+9 paise (Thu)
Reported a fourth consecutive firmer session

Nifty 500 (Thu)
23,897.15
+1.13% (Thu, +266.90 pts)
352 up, 144 down, five unchanged

Indian index levels, points changes, percentages, the earnings and book multiples, the intraday range and every internal advance and decline count are from NSE's own official dated close file for Thursday 19 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 interbank settlement reported by a news agency, not an exchange close. NO CRUDE LEVEL IS PRINTED TODAY: no source read this morning carried a Thursday settlement rather than an intraday or futures quote.

02

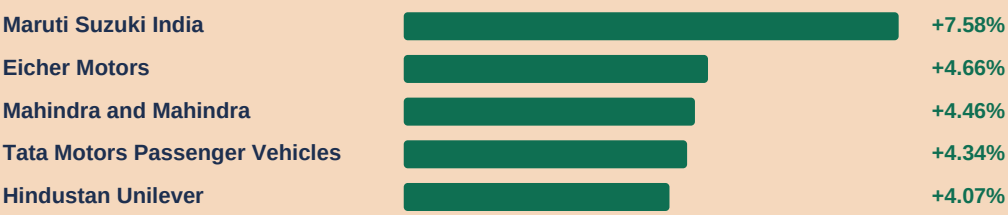
Sectors, Movers, Flows and Breadth

Sectoral indices, prior session

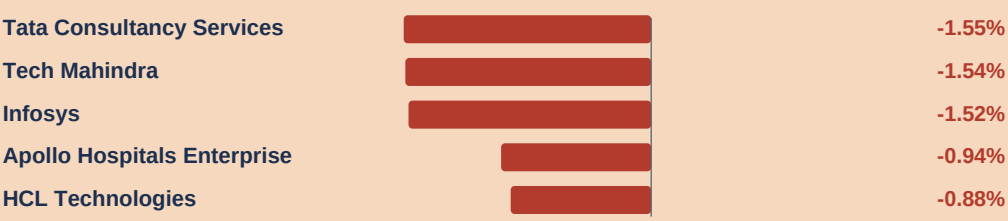


NSE index family, Thursday 19 November closes from the exchange's own official dated file. Fourteen of the fifteen sectoral indices rose and one fell. Five rose with no declining constituent at all.

Top gainers



Top losers



Thursday 19 November closes, Nifty 50 constituents only. Four independent closing wraps agree on these ten names, their order and their percentages. A fifth source gives the same ten names in a different internal order with second-decimal differences, which is consistent with NSE against BSE pricing; the names themselves are stable across every source read. FOUR OF THE FIVE WEAKEST ARE TECHNOLOGY NAMES, which is what a 1.10% fall in the sectoral index looks like from underneath. NSE's official dated file carries index levels and not individual stock prices, so the ordering could not be settled against the exchange.

Market breadth, prior session



NSE's own per-index constituent counts for the Thursday 19 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 five unchanged.

Valuation context

NIFTY 50 P/E	NIFTY 50 P/B
20.78	3.13
19 Nov close, NSE official dated file	*19 Nov close, same file*

The earnings and book multiples are NSE's own, carried as columns in its official dated close file for Thursday 19 November 2026. THE DIVIDEND YIELD IN THE SAME FILE IS WITHHELD FOR A TWENTY-SEVENTH 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 the exchange has published no correction.

WHAT THE DATA SHOWS

Thursday was a broad advance in which almost nothing fell, and the overnight then went the other way. ONE OF THE FIFTEEN SECTORAL INDICES FELL. Information Technology lost 342.85 points or 1.10% to 30,919.45 on three constituents up against seven.

Every other sectoral index rose, and FIVE OF THEM ROSE WITHOUT A SINGLE DECLINER: Nifty Auto on all fifteen of its constituents, Nifty Bank and Nifty Consumer Durables on all fourteen, Nifty PSU Bank on all twelve and Nifty Private Bank on all ten. On Wednesday eleven of the fifteen had fallen.

The week has now produced eleven up, eleven down and fourteen up in three sessions. THE BENCHMARK CLOSED AT ITS OWN HIGH. The Nifty 50 rose 286.35 points or 1.14% to 25,514.30 on forty-two constituents against eight, and NSE's dated file records the close and the session high as the same number.

The Sensex rose 989.94 points or 1.21% to 83,021.75. The advance went all the way down: the Nifty 500 rose 1.13% on 352 advances against 144 and five unchanged, the Next 50 rose 1.64% on forty-two against seven, the Midcap 100 rose 1.06% on seventy-seven against twenty-one and the Smallcap 100 rose 0.71% on sixty-five against thirty-four.

AUTOS AND CONSUMPTION DID THE WORK. Nifty Auto rose 1,206.35 points or 4.40%, with every one of its fifteen constituents higher; Maruti Suzuki rose 7.58%, Eicher Motors 4.66%, Mahindra and Mahindra 4.46% and Tata Motors Passenger Vehicles 4.34%. Consumer Durables rose 3.64% on all fourteen, a day after falling 3.13% on three up against eleven.

FMCG rose 2.09% on thirteen of fifteen. Softer commodity prices are the reason reported for the move; this page prints the attribution and not a cause of its own.

NIFTY BANK'S CLOSE IS ALSO ITS YEAR HIGH. The index rose 1,024.35 points or 1.65% to 63,063.00 with all fourteen constituents higher, and the exchange's own feed carries 63,063.00 as its fifty-two-week high - so the highest level of the past year is Thursday's close itself. Nifty Private Bank closed at 30,746.95, which the same feed also carries as that index's year high.

A fifty-two-week high is not an all-time high and is not described as one here. VOLATILITY ROSE ON A RISING MARKET, AND THEN THE OVERNIGHT TURNED. India VIX rose 0.55 points or 3.50% to 16.11 on a session the benchmark gained 1.14% - the two usually move apart.

Foreign institutions bought a net Rs 7,411.41 crore and domestic institutions sold a net Rs 1,356.57 crore. Then the Dow Jones Industrial Average fell 1,101.11 points or 2.19% to 49,097.06, the S&P; 500 fell 2.02% to 7,175.83 and the Nasdaq Composite 2.25% to 23,879.20, with the selling reported as broad rather than confined to technology. GIFT Nifty was 25,312.00 at 08:42, 168.00 points or 0.66% below its own prior settlement, on a feed tested twice whose timestamp and contracts-traded count both advanced.

03

Stocks in the News

THE SESSION

One of the Fifteen Fell.

On Thursday 19 November the Nifty 50 rose 286.35 points or 1.14% to 25,514.30 on FORTY-TWO CONSTITUENTS UP AGAINST EIGHT, and NSE's dated file records the close and the session high as the same number - 25,514.30 - so the index finished at its best level of the day. The Sensex rose 989.94 points or 1.21% to 83,021.75. The advance ran all the way down the market: the Nifty 500 rose 1.13% to 23,897.15 on 352 advances against 144 and five unchanged, the Next 50 rose 1.64% to 72,889.75 on forty-two against seven, the Midcap 100 rose 1.06% to 61,624.40 on seventy-seven against twenty-one and the Smallcap 100 rose 0.71% to 19,468.40 on sixty-five against thirty-four. ONLY INFORMATION TECHNOLOGY FELL among the fifteen sectoral indices, 1.10% lower on three constituents up against seven.

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 Thursday 19 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.

SECTORS

Five Indices With No Decliner At All

NIFTY AUTO ROSE 1,206.35 POINTS OR 4.40% TO 28,601.30 WITH EVERY ONE OF ITS FIFTEEN CONSTITUENTS HIGHER. Nifty Bank rose 1.65% to 63,063.00 and Nifty Consumer Durables 3.64% to 38,644.35, both on all fourteen of their constituents; Nifty PSU Bank rose 2.29% on all twelve and Nifty Private Bank 1.39% on all ten. FIVE SECTORAL INDICES WITH NO FALLING CONSTITUENT AT ALL; on Tuesday this page printed two, and on Wednesday none. Consumer Durables had fallen 3.13% the day before on three constituents up against eleven. Among individual names Maruti Suzuki rose 7.58%, Eicher Motors 4.66%, Mahindra and Mahindra 4.46% and Tata Motors Passenger Vehicles 4.34%. Softer commodity prices are the reason reported for the move; this page prints the attribution and offers no cause of its own.

Sectoral percentages and levels are from NSE's official dated close file for Thursday 19 November 2026; the constituent counts are from the exchange's own per-index feed read at 08:43 hours IST today. Individual stock percentages are from four agreeing closing wraps, not from the exchange, whose dated file carries index levels rather than stock prices.

BANKS

The Year High Is Thursday's Close

Nifty Bank rose 1,024.35 points or 1.65% to 63,063.00 with ALL FOURTEEN of its constituents higher, and the exchange's own feed carries 63,063.00 as the index's fifty-two-week high - so the highest level of the past year is Thursday's close itself. Nifty Private Bank closed at 30,746.95, which the same feed also carries as that index's year high. A FIFTY-TWO-WEEK HIGH IS NOT AN ALL-TIME HIGH and is not described as one here. On 17 November this page printed the same shape for Nifty Bank and on 16 November the opposite, when a close reported as a record sat 188.95 points below the year high. The distinction is printed each time rather than smoothed into the word 'record'.

Index levels and points changes are from NSE's official dated close file for Thursday 19 November 2026; the constituent counts and the fifty-two-week highs are from the exchange's own per-index feed read at 08:43 hours IST today.

04

Earnings & Corporate Radar

Nothing domestic is scheduled to report today

The overnight item is a record listing that did not lift its own sector

A United States artificial-intelligence company is reported to have raised about 81.3 billion dollars in a Nasdaq listing, described as the largest on record, pricing at 83 dollars a share, opening about 34% above that and closing 17.07% up at 97.17 dollars. The reported effect was a rotation out of incumbent technology names to fund the new listing rather than a lift to them.

ALL OF THESE FIGURES ARE PRESS-SOURCED AND NONE WAS READ FROM A FILING. The characterisation of the rotation is reporting, not a conclusion of this page. 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
Mahanadi Coalfields	The initial public offering that opened yesterday is reported to close on Monday 23 November, at a band of Rs 129 to Rs 136 a share for about Rs 8,981 crore, structured entirely as an offer for sale. Subscription figures are not printed here because none was read from a primary source this morning, and this page prints no unofficial pre-listing price indication for any issue.
Tata Trusts	A trust board is reported to meet today on grant approvals, with the proposed Tata Sons listing said NOT to be on the agenda; the Tata Sons board is reported to meet on 26 November, where it is expected to come up. Both the agenda and the expectation are attributed to unnamed persons and neither has been confirmed by the trusts.
Maruti Suzuki India	Rose 7.58% on Thursday, the strongest Nifty 50 constituent of the session on four agreeing closing wraps, within a sectoral index that rose 4.40% on every one of its fifteen names.
Technology services	Four of the five weakest Nifty 50 constituents were technology names - Tata Consultancy Services, Tech Mahindra, Infosys and HCL Technologies - against a sectoral index 1.10% lower. The sector is reported to have fallen in each of the last three sessions.
An artificial-intelligence listing abroad	A United States company is reported to have raised about 81.3 billion dollars in what is described as the largest listing on record, closing its first day 17.07% above its issue price. The reported market effect was money rotating out of existing technology names to fund it.
Nvidia	Reported to have closed 3.3% lower despite quarterly revenue and guidance above estimates. NO REASON FOR ITS CHIEF EXECUTIVE'S DEPARTURE HAS BEEN GIVEN BY THE COMPANY AND NONE IS STATED HERE.
Margin funding	This page carried a news-agency report on 18 November that the regulator is weighing restrictions on fresh margin-funded purchases. No official statement or consultation paper has been read since, and the position is unchanged.
Securities regulation	The regulator's chairman was reported on 19 November to have said that extending trading hours is not a priority. Reported remarks at a conference, not a circular.
Derivatives ban list	No list is printed. The exchange's own file had not rolled past the previous trade date when the 06:45 research run read it, and a single secondary source carrying a nil list for today was not corroborated. This page does not print a list it has not read itself.
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. One Index Fell, and Five Had No Faller At All

■ FOURTEEN OF THE FIFTEEN SECTORAL INDICES ROSE. Information Technology was the only faller, 1.10% lower on three constituents up against seven.

■ FIVE ROSE WITH NO DECLINING CONSTITUENT: Auto on all fifteen, Bank and Consumer Durables on all fourteen, PSU Bank on all twelve and Private Bank on all ten.

■ NIFTY AUTO ROSE 4.40% AND CONSUMER DURABLES 3.64%, the latter a day after falling 3.13% on three constituents up against eleven.

■ ON WEDNESDAY ELEVEN OF THE FIFTEEN FELL. Three sessions have produced eleven up, eleven down and fourteen up.

B. The Benchmark Closed At Its High

■ THE NIFTY 50 ROSE 1.14% TO 25,514.30 ON FORTY-TWO CONSTITUENTS AGAINST EIGHT, and the file records the close and the session high as the same number.

■ THE NIFTY 500 ROSE 1.13% ON 352 ADVANCES AGAINST 144 AND FIVE UNCHANGED. The Next 50 rose 1.64% on forty-two against seven.

■ NIFTY BANK'S CLOSE OF 63,063.00 IS ALSO THE FIFTY-TWO-WEEK HIGH the exchange's feed carries for it; Nifty Private Bank's close is likewise its own year high.

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

C. Volatility Rose On A Rising Market

■ INDIA VIX ROSE 0.55 POINTS OR 3.50% TO 16.11 on a session the benchmark gained 1.14%. The two usually move apart.

■ THREE DIFFERENT VIX CLOSES CIRCULATED FOR THURSDAY. The exchange's own dated file governs and is what is printed.

■ FOREIGN INSTITUTIONS BOUGHT A NET Rs 7,411.41 CRORE AND DOMESTIC INSTITUTIONS SOLD A NET Rs 1,356.57 CRORE, both from the exchange's own provisional report.

■ THE RUPEE IS REPORTED TO HAVE SETTLED AT 93.32, nine paise firmer and a fourth consecutive gaining session. A provisional interbank settlement, not an exchange close.

D. Then The Overnight Went The Other Way

■ THE DOW FELL 1,101.11 POINTS OR 2.19% TO 49,097.06, THE S&P; 500 2.02% TO 7,175.83 AND THE NASDAQ COMPOSITE 2.25% TO 23,879.20.

■ THE SELLING IS REPORTED AS BROAD RATHER THAN CONFINED TO TECHNOLOGY, with industrials among the weakest. This page prints the reported shape, not a cause of its own.

■ SOURCES DISAGREE ON WHETHER THAT WAS A FIFTH OR A SIXTH CONSECUTIVE DECLINE for the S&P; 500, so no count is printed - only that the run is continuing.

■ GIFT NIFTY WAS 25,312.00 AT 08:42, 0.66% BELOW ITS OWN PRIOR SETTLEMENT, on a feed pulled twice whose timestamp and contracts-traded count both advanced - so the reading is live.

06

Today's Watchlist

Watch	Why it matters
Whether Thursday's breadth survives the overnight	Forty-two of the fifty rose on Thursday and the Nifty 500 advanced on 352 names against 144. The Dow then fell 2.19% and the Nasdaq Composite 2.25%, and GIFT Nifty is 0.66% below its own prior settlement.
Monday's compressed expiry	The November monthly settles on Monday 23 November together with the shifted weekly, for the Nifty, the Bank Nifty and the sectoral contracts, moved off Tuesday 24 November for the holiday. One settlement day carrying two expiries.
Whether technology keeps falling alone	Nifty IT was the only sectoral index to fall on Thursday, 1.10% lower on three constituents against seven, and four of the five weakest Nifty 50 names were technology. It is reported to have fallen in each of the last three sessions.
Volatility that rose on a rising market	India VIX rose 3.50% to 16.11 on a session the benchmark gained 1.14%. The two usually move apart, which is why the exception is printed rather than passed over.
Whether the flow holds through a hawkish overnight	Foreign institutions bought a net Rs 7,411.41 crore on Thursday against domestic selling of Rs 1,356.57 crore, and the rupee is reported firmer for a fourth session. A dollar reported at a nineteen-month high is the force on the other side.

The day planner

Time (IST)	Event
09:15	NSE and BSE regular trading opens. NO DERIVATIVES EXPIRY TODAY
Today	Reserve Bank weekly foreign exchange reserves for the week ended 13 November, and eight-core-industries output for October - the two scheduled domestic releases
Today	Mahanadi Coalfields' offering is in its second day and is reported to close on Monday 23 November
Saturday 21 November	Quarterly bulletin of the annual survey of unincorporated enterprises, for July to September
Monday 23 November	COMPRESSED EXPIRY: the NSE November monthly settles together with the shifted weekly - Nifty, Bank Nifty and the sectoral contracts on one day - moved off Tuesday 24 November for the holiday. Rule-derived and corroborated by the GIFT contract's own expiry date, which reads 23 November; no NSE circular confirming the shift has been read
Tuesday 24 November	EXCHANGES CLOSED for Prakash Gurpurb Sri Guru Nanak Dev, confirmed against the exchange's own holiday circular. 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. The Tata Sons board is reported to meet
Saturday 28 November	Index of industrial production for October, as the official calendar lists it
Sunday 29 November	Index of services production, as the official calendar lists it
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 about two per cent across the board

What was reported: The Dow Jones Industrial Average fell 1,101.11 points or 2.19% to 49,097.06, the S&P; 500 fell 2.02% to 7,175.83 and the Nasdaq Composite 2.25% to 23,879.20. The selling is reported as broad rather than confined to technology, with industrials among the weakest. SOURCES DISAGREE ON WHETHER THAT WAS A FIFTH OR A SIXTH CONSECUTIVE DECLINE for the S&P; 500, so no count is printed here - only that the run is continuing. The reported backdrop is the Federal Reserve's October minutes, published on 18 November, in which nearly all participants are reported to have judged further increases likely appropriate.

A record listing that pulled money out of its own sector

What was reported: A United States artificial-intelligence company is reported to have raised about 81.3 billion dollars in a Nasdaq listing described as the largest on record, pricing at 83 dollars, opening roughly 34% higher and closing 17.07% up at 97.17 dollars. The reported effect was a rotation OUT of incumbent technology names to fund the new issue rather than a lift to them, with one large chipmaker reported 7.72% lower. Nvidia is reported to have closed 3.3% lower despite quarterly revenue and guidance above estimates; NO REASON FOR ITS CHIEF EXECUTIVE'S DEPARTURE HAS BEEN GIVEN BY THE COMPANY AND NONE IS STATED HERE.

The dollar firm, the rupee firmer, and no crude settlement to print

What was reported: The dollar index is reported at a nineteen-month high and the American ten-year yield is reported at about 5.04% at the New York close, on a page that does not carry an official curve for the date. The rupee is reported to have settled at 93.32, nine paise firmer and a fourth consecutive gaining session, on continued foreign buying. NO CRUDE LEVEL IS PRINTED TODAY: every Brent and West Texas figure read this morning was an intraday or futures quote rather than a settlement, and a quote without a session basis is not printed here. Gold is reported sharply lower through Thursday with six different levels circulating across three dates and no canonical close, so no gold figure is printed either.

Asian markets closed higher on Thursday

What was reported: On Thursday the Nikkei 225 rose 0.71% to 59,444.21, with the regional tape firmer ahead of the American fall that came later. EVERY ASIAN FIGURE ON THIS PAGE IS A THURSDAY CLOSE. Asian markets are trading while this page is read and no live quote from them is printed as data - which matters more than usual today, because the American session that followed those closes went the other way.

08

Closing Note

Thursday 19 November was a broad advance. The Nifty 50 rose 286.35 points or 1.14% to 25,514.30 with FORTY-TWO constituents higher and eight lower, and the Sensex rose 989.94 points or 1.21% to 83,021.75. The Nifty 500 rose 1.13% to 23,897.15 on 352 advances against 144 and five unchanged, the Next 50 rose 1.64% to 72,889.75 on forty-two against seven, the Midcap 100 rose 1.06% to 61,624.40 on seventy-seven against twenty-one, the MidSmallcap 400 rose 0.92% to 20,865.85 on 268 against 129 and the Smallcap 100 rose 0.71% to 19,468.40 on sixty-five against thirty-four.

FOURTEEN OF THE FIFTEEN SECTORAL INDICES ROSE AND ONE FELL. The fourteen were Auto 4.40% higher to 28,601.30, Consumer Durables 3.64% to 38,644.35, PSU Bank 2.29% to 9,761.05, FMCG 2.09% to 48,564.25, Bank 1.65% to 63,063.00, Private Bank 1.39% to 30,746.95, Energy 1.15% to 37,405.35, Financial Services 1.10% to 28,299.65, Oil and Gas 0.86% to 11,491.05, Metal 0.63% to 12,299.75, Pharma 0.61% to 28,371.80, Healthcare 0.54% to 17,338.95, Realty 0.48% to 923.10 and Media 0.17% to 1,785.80. The one that fell was Information Technology, 1.10% lower to 30,919.45. India VIX rose 0.55 points or 3.50% to 16.11.

The intraday shape, which only the exchange's dated file carries, was a climb that did not give anything back. NSE's file records an open of 25,186.80, a high of 25,514.30 and a low of 25,104.80 against a close of 25,514.30, on turnover of Rs 33,380.55 crore - THE CLOSE AND THE HIGH ARE THE SAME NUMBER, so the index finished at its best level of the session, 409.50 points above its low. Nifty Bank, the Midcap 100, Nifty Private Bank and Nifty Financial Services each also closed at their own session high. India VIX ranged from 15.52 to 16.89 and closed at 16.11, so volatility rose on a session in which the benchmark gained 1.14% and finished at its high - the two usually move apart, which is why it is printed rather than passed over.

Foreign institutions bought a net Rs 7,411.41 crore in the cash segment and domestic institutions sold a net Rs 1,356.57 crore, both from the exchange's own provisional report read this morning, with gross legs of Rs 20,706.95 crore against Rs 13,295.54 crore on the foreign side and Rs 17,651.50 crore against Rs 19,008.07 crore on the domestic side. The rupee is reported to have settled at 93.32, nine paise firmer and a fourth consecutive gaining session. A month-to-date foreign inflow figure is NOT printed: two reports a day apart give materially different totals for the same month and neither is an exchange publication.

Overnight the Dow Jones Industrial Average fell 2.19% to 49,097.06, the S&P; 500 2.02% to 7,175.83 and the Nasdaq Composite 2.25% to 23,879.20. GIFT Nifty was 25,312.00 at 08:42 this morning, 168.00 points or 0.66% below its own prior settlement, on a feed pulled twice minutes apart whose timestamp and contracts-traded count both advanced - a live reading. WHAT IS NOT PRINTED: no crude level, because every figure read was intraday or futures rather than a settlement; no gold level, because six levels across three dates circulate with no canonical close; no month-to-date foreign inflow, because two reports a day apart disagree materially; no derivatives ban list, because the exchange's own file had not rolled when it was read; no dividend yield, for a twenty-seventh consecutive session; no Indian policy rate; no brokerage rating, target or forecast; and no live Asian quote.

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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WEBSITE

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

Not Investment Advice: Nothing in this document constitutes investment advice, a solicitation, an offer, or a recommendation to buy, sell, or hold any security, financial instrument, commodity, or investment product. Readers must not act solely on information provided herein.

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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 highs for Nifty Bank and Nifty Private Bank, and every internal advance and decline count are taken from NSE's own official dated close file for Thursday 19 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 legs are from the exchange's own provisional cash report, read in the same pass. THE SENSEX IS A BSE INDEX AND IS NOT IN THAT FILE: 83,021.75 is copied character for character from the research run. THE 06:45 RESEARCH RUN REPORTED THE NIFTY 50'S INTERNAL BREADTH AS UNVERIFIED AND ITS SECTORAL CLOSING LEVELS AS UNOBTAINABLE. The exchange's own feed carries the breadth - forty-two advances against eight - and its dated file carries every sectoral close, so both are printed from the exchange. That is the THIRD CONSECUTIVE SESSION on which checking a research-run negative against this page's own pull changed what could honestly be said, and it is now a standing step rather than a lucky catch. THREE DIFFERENT INDIA VIX CLOSES CIRCULATED for Thursday; the exchange's dated file governs at 16.11, up 0.55 points or 3.50%. A MARKET-WIDE COUNT OF 2,013 ADVANCES AGAINST 1,606 DECLINES circulates and is not printed as this page's data; the per-index counts throughout are the exchange's own. The ten Nifty 50 movers are from four agreeing closing wraps; a fifth source gives the same ten names in a different internal order with second-decimal differences, consistent with NSE against BSE pricing, and NSE's dated file carries index levels rather than stock prices, so the ordering could not be settled against the exchange. THE DIVIDEND YIELD IS WITHHELD FOR A TWENTY-SEVENTH CONSECUTIVE SESSION - BUT THURSDAY'S TAPE WAS CLEAN, AND THAT IS WORTH SAYING PLAINLY. Both tests were run on the Thursday file against Wednesday's, across the 169 indices present in both. The same-direction test had 128 indices to judge, the broadest sample it has had, and NOT ONE breached: no index moved its published yield the same way as its price. The second test could barely fire, with only eight near-flat indices, and none breached. The Nifty 50's own yield moved 0.74% against a price gain of 1.14%, where an unchanged base implies 1.13% - a gap inside a single rounding step at two decimals, not a breach. ONE CLEAN SESSION DOES NOT UNDO TEN, and the series is still withheld; what would end the withholding is the exchange publishing a notice, an effective date or an erratum, or a run of clean sessions long enough to be worth printing. The sequence to date reads clean, clean, broken, clean, broken, broken, clean, broken, broken, broken, clean. NO CRUDE OR GOLD LEVEL IS PRINTED: every crude figure read this morning was intraday or futures rather than a settlement, and six gold levels across three dates circulate with no canonical close. NO MONTH-TO-DATE FOREIGN INFLOW IS PRINTED: two reports a day apart give materially different totals. NO DERIVATIVES BAN LIST IS PRINTED: the exchange's own file had not rolled past the previous trade date when it was read, and a single uncorroborated secondary source is not enough. United States and Asian index closes are from wire copy for the Thursday sessions, each labelled with that date; no live Asian quote is printed, which matters today because the American session that followed those Asian closes went the other way. Every corporate item is secondary reporting; the exchanges' own announcement pages were not readable this morning.