



**Ckredence<sup>TM</sup>**  
**Wealth**

*Your Journey to Prosperity*

*SEBI (PMS) Regn No. INP000007164*

*SEBI (IA) Regn No. INA000020846*



A New World Of  
Opportunities & Growth

**Market Landscape Nov' 25**

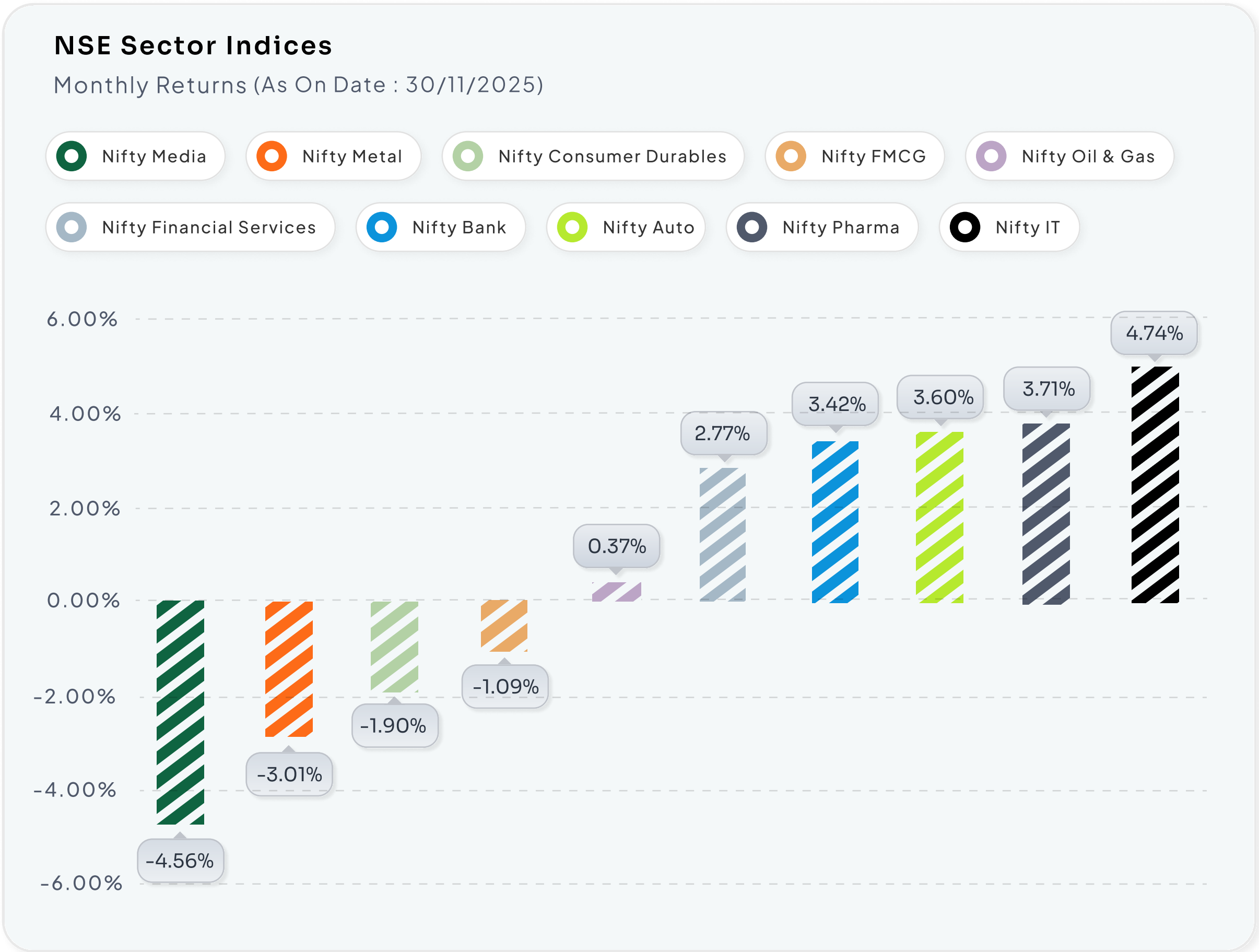
Formerly Chirag Investment Since 1987

# KEY INDICES PERFORMANCE (Nov`2025)

| Indices             | Opening | Closing | 1M%Chg | 1Y%Chg |
|---------------------|---------|---------|--------|--------|
| Nifty 50            | 25,722  | 26,203  | 1.9%   | 8.6%   |
| BSE 500             | 37,214  | 37,536  | 0.9%   | 5.1%   |
| Nifty Mid Cap 100   | 59,826  | 61,043  | 2.0%   | 8.2%   |
| Nifty Small Cap 100 | 18,381  | 17,829  | -3.0%  | -4.4%  |

Source: Investing.com

# NSE SECTOR INDICES MONTHLY RETURN



Source: Investing.com

# NIFTY 50 P/E

| Current PE                   | FY26E |
|------------------------------|-------|
| 22.80                        | 22.21 |
| Source : Ckredencewealth.com |       |

(Data as on 30th Nov)

# FII & DII ACTIVITY

(As On Date : 30/11/2025)

| (Rs Cr) | MTD       | QTD        | YTD         |
|---------|-----------|------------|-------------|
| FII     | -₹ 17,500 | -₹ 55,149  | -₹ 2,89,052 |
| DII     | ₹ 77,084  | ₹ 1,95,221 | ₹ 7,42,759  |

Source: Moneycontrol.com

# Global Market (Nov`2025)

# GLOBAL INDICES

| YOY %                                           | OPENING | CLOSING | 1M % CHG | 1Y % CHG |
|-------------------------------------------------|---------|---------|----------|----------|
| Nasdaq 100                                      | 25,858  | 25,435  | -1.64%   | 21.52%   |
| Dow Jones                                       | 47,563  | 47,716  | 0.32%    | 6.25%    |
| Hang Seng                                       | 25,907  | 25,859  | -0.18%   | 33.13%   |
| Nikkei 225                                      | 52,411  | 50,254  | -4.12%   | 31.53%   |
| Source: Investing.com (As On Date : 30/11/2025) |         |         |          |          |

ECONOMIC INDICATORS

| YOY %                                                                                         | CURRENT                   | QUARTER AGO               | YEAR AGO                   |
|-----------------------------------------------------------------------------------------------|---------------------------|---------------------------|----------------------------|
| Consumer Price Index                                                                          | 0.25%<br>(Oct - 25)       | 1.55%<br>(Jul - 25)       | 6.21%<br>(Oct - 24)        |
| India Industrial Production                                                                   | 0.40%<br>(Oct - 25)       | 3.50%<br>(Jul - 25)       | 3.50%<br>(Oct - 24)        |
| GDP                                                                                           | 8.20%<br>(Apr - Jun,2025) | 7.80%<br>(Apr - Jun,2025) | 5.40%<br>(Apr - Jun, 2024) |
| Wholesale Price Index                                                                         | -1.21%<br>(Oct - 25)      | -0.58%<br>(Jul - 25)      | 2.36%<br>(Oct - 24)        |
| ✦ Source: Ministry of Statistics and Programme Implementation, Office of the Economic Advisor |                           |                           |                            |

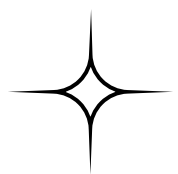
Currency & Commodity

PRICE MOVEMENT

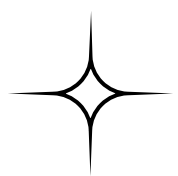
| Currency And Commodity  | 30 Nov   | 1M Ago   | 3M Ago   | 1Y Ago |
|-------------------------|----------|----------|----------|--------|
| USD/INR                 | 89.357   | 88.769   | 88.174   | 84.559 |
| NYMEX Crude oil(\$/bbl) | 58.55    | 60.98    | 64.01    | 68     |
| Gold (Rs / 10gm)        | 1,26,833 | 1,21,232 | 1,03,824 | 76,374 |

✦ Source - ibja- rates spot prices, investing.com, tradingview, gold price india

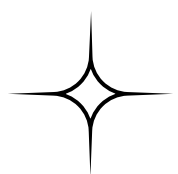
## BHARAT BULLETIN



As per Confederation of Indian Textile Industry, 1/3rd of Indian textile and apparel CPI Inflation Rate in India decreased to 0.25% in Oct-25 from 1.54% in Sept-25. Inflation Rate in India averaged 5.71% from 2012 until 2025, reaching an all-time high of 12.17% in Nov of 2013 and a record low of 0.25% in October of 2025. exporters reported ~50% drop in sales due to US tariffs. The exporters are seeking new buyers in Europe.

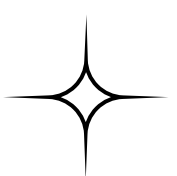


India's forex reserves fell to USD 689.7bn as of October 31, down from USD 695.4bn the previous week. Reserves remain below the record high of USD 704.bn hit in Sep-24.

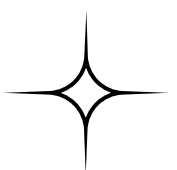


GST collections grew by 4.8% YoY and by 3.7% on MoM basis to Rs 1.96trn in Oct-25, driven by robust festive spending and pent-up demand following recent tax cuts.

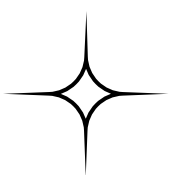
## INTERNATIONAL UPDATES



Japan's GDP contracted 0.4% QoQ in Q3CY25, reversing an upwardly revised 0.6% growth in Q2. It was the first quarterly drop since Q1 2024, reflecting subdued private consumption amid lingering cost pressures



Eurozone inflation held at 2.1% in October 2025, edging down from 2.2% in September and staying close to the ECB's 2% target. Food inflation eased to 2.5%, and non-energy industrial goods slowed to 0.6%, while energy prices fell further at -0.9%



China's industrial production grew 4.9% YoY in Oct-25, slowing from a 6.5% increase in the previous month and missing market expectations of 5.5%. This marked the softest increase since Aug-24, due to softer rises in manufacturing activity (4.9% vs 7.3% in Sept) and mining (4.5% vs 6.4%)

## RISK FACTOR AND DISCLAIMER

Equities as an asset class carry a higher risk in comparison to debt. While risk cannot be totally eliminated, it can be mitigated through a well-designed investment strategy. However, this objective may not be fully achieved due to various reasons such as unfavourable market movements, misjudgement by portfolio manager, adverse political or economic developments etc.

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### About the Company:

Ckredence Wealth Management Private Limited is registered with the Securities and Exchange Board of India (“SEBI”) as Portfolio Manager and an Investment Adviser under SEBI (Portfolio Managers) Regulations 2020. Vide Registration no. INP000007164 dated June 7, 2021. and SEBI (Investment Advisers) Regulations, 2013 (“IA regulations”) vide registration no. INA000020846 dated August 7, 2025, pursuant to which it provides Portfolio Management and Investment Advisory services to its clients.