

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8556	(0.38)	CNX IT	11981	0.70
Sensex	28560	(0.47)	BANK NIFTY	18525	0.07
DowJones	17777	(0.29)	S&P CNX 500	6898	(0.29)
Nasdaq	4727	(1.34)	CNX FMCG	20217	0.94
Hangseng	23334	(0.14)	CNX REALTY	4255	(0.47)
Shanghai	2677	(0.13)	CNX AUTO	8556	0.19
Nikkei	17585	(0.03)	CNX ENERGY	9203	(2.77)
Strait Times	3335	0.89	CNX PHARMA	11254	(0.01)
Kospi	1956	(0.46)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9017	(1.11)	Advances	1218	543
FTSE	6656	(0.99)	Declines	1675	978
CAC	4377	(0.29)	Unchanged	93	70
DAX	9964	(0.17)	Total	2986	1591

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ASIANPAINT	799.00	7.29
HEROMOTOCO	3266.60	3.79
DLF	154.35	3.52
INDUSINDBK	772.10	2.88
HINDUNILVR	807.70	2.75

Nifty Losers		
Company	Price(Rs)	Chg(%)
JINDALSTEL	135.00	(4.05)
NMDC	134.40	(3.97)
ONGC	365.20	(3.74)
HINDALCO	168.05	(3.45)
BHEL	274.20	(3.38)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
APLAPOLLO	2.70	0.1	54
GOKEX	18.10	0.3	53
KAJARIACER	3.13	0.1	29
ECLERX	0.52	0.0	27
TBZ	3.46	0.2	24

Indian Forex	Closing	Chg	% Chg
USD/INR	62.138	0.164	0.26
GBP/INR	97.053	(0.314)	(0.32)
EUR/INR	77.368	0.204	0.26
JPY/INR	52.260	(0.190)	(0.36)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	25920	(215)
Silver (Rs/1kg)	35300	(350)

Commodities	Price	% Chg.
Crude (US\$/BBL)	68.4	3.46
Brent (US\$/BBL)	72.0	2.62
Gold (US/oz)	1204.8	2.49
Silver (US\$/oz)	16.3	4.76
Copper (US\$/MT)	6385.0	(2.00)
Alum (US\$/MT)	2021.0	(2.44)
Zinc(US\$/MT)	2195.0	(1.44)

ADR	Cl. Values	% Chg.
ICICI Bank	58.20	(0.69)
HDFC Bank	50.98	(2.31)
Infosys	69.84	0.00
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	58.38	(0.01)
Wipro	12.88	(0.02)
Tata Motors	45.61	(0.05)

## Market Sensor

US market declined on Monday, with the Nasdaq Composite falling for the first session in seven, as a lackluster start to the holiday shopping season mostly overrode data that had a measure of U.S. factory activity slowing less than expected in November. Dow Jones Industrial Average was down 0.29% or 51.44 at 17776.80. Nasdaq Composite was down 1.34% or 64.28 points at 4727.35. Standard & Poor's 500 was down 0.68% or 14.12 points at 2053.44.

Indian equity market pulled down on weak global cues, traders were booking profit after relentless buying in the last few session and prior to RBI credit policy announcement. HSBC Manufacturing data was 21-month high at 53.3 in November from 51.6 in October. Nifty ended the previous trading session with a gain of 0.38% or 32.35 points at 8555.90. On Monday's trading session, FII's sold net Rs.12.36 Cr in cash market and bought net Rs.55.79 in derivative segment. Whereas, DII sold net Rs.555.17 Cr in cash segment.

**Coming to today's trade Nifty to trade volatile, crucial intraday support seen at 8510 followed by 8460 while resistance exist at 8580 and then at 8650**

## Global News

❖Australia's central bank will reduce its key interest rate next year as unemployment rises, Deutsche Bank AG said, breaking ranks with its major counterparts. (Bloomberg)

❖Looking out from the top of the European Central Bank's new tower in Frankfurt, it's easy to find dark clouds on the horizon. (Bloomberg)

❖The sharp drop in oil prices will support U.S. growth by boosting spending, two top Federal Reserve officials said, playing down the risk that plunging energy costs could push inflation further below the Fed's goal. (Bloomberg)

❖The European Central Bank signaled that it'll be cautious as it buys asset-backed securities for the first time in its latest stimulus measure for the euro area. (Bloomberg)

❖Switzerland has sidestepped the threat to its franc posed by the referendum on gold reserves. Now the focus turns to containing the fallout from the European Central Bank's stimulus program. (Bloomberg)

❖Manufacturing growth in the U.S. barely skipped a beat in November, holding near the strongest pace in three years, as the world's largest economy rose above a global slowdown. (Bloomberg)

## Economic News

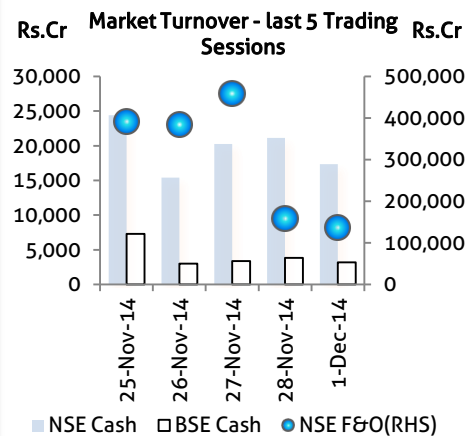
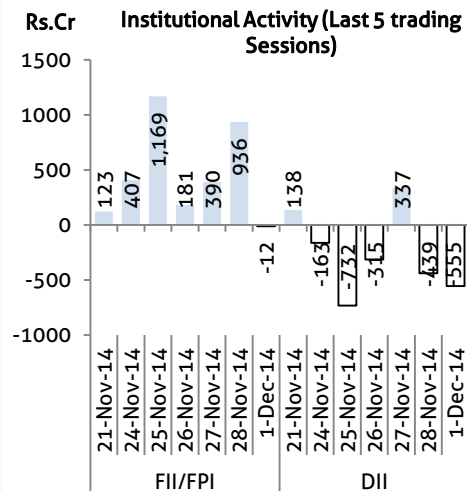
- ❖ Investments worth Rs 2.15 lakh crore have grounded in Odisha from industries that have signed memorandum of understanding (MoU) with the state government. (BS)
- ❖ Despite a sequential slowdown in economic growth (5.3% in Q2 against 5.7% in Q1), economists are not cutting their full year forecasts just yet. Economists believe that despite the slowdown, the risks are fairly balanced on both sides. (BS)
- ❖ Indian factory activity rose to a 21-month high in November, but that did not lead to additional hiring, showed the widely tracked HSBC purchasing managers' index (PMI) data released. (BS)
- ❖ Finance Minister Arun Jaitley expressed hope that the much-awaited GST Bill, which provides for a uniform indirect tax structure, would be introduced in the current winter session of Parliament. (BS)
- ❖ Finance Minister Arun Jaitley reiterated on Monday that the government will try to introduce the constitutional amendments to the Goods and Service Tax in the ongoing winter session of Parliament. (BS)
- ❖ Mergers and acquisitions have to be encouraged to promote the size of domestic companies but there is also a need to understand when to draw the red line while implementing the competition law, Corporate Affairs Minister Arun Jaitley said. (BS)
- ❖ The infrastructure and banking industries suffer losses worth around Rs 400 crore per day due to delayed decision-making at various levels, Road Transport and Highways Minister Nitin Gadkari said here. (BS)
- ❖ The Cabinet Committee on Economic Affairs (CCEA) is set to take up HDFC Bank's proposal to raise the cap on foreign investment in it to 74%, after the Foreign Investment Promotion Board (FIPB) recommended this at a meeting last month. (BS)
- ❖ Price of non-subsidised cooking gas (LPG) was cut by a steep Rs 113 per cylinder and that of jet fuel (ATF) by 4.1% as international oil rates slumped to multi-year lows. (BS)
- ❖ An unexpected move by the Reserve Bank of India (RBI) to ease curbs on overseas purchases instead of tightening them indicates the government is more relaxed about the trade deficit, though trade sources said it does not mean there will be a jump in imports. (BS)
- ❖ Andhra Pradesh chief minister N Chandrababu Naidu on Monday said the Japanese Softbank had indicated its willingness to fund about 10,000 mw of solar power in India during his recent trip to Japan. (BS)

## Domestic News

- ❖ Tyre manufacturer MRF Ltd has said that over the next three years it would invest around Rs 4,000 crore, to build up additional capacity and to introduce new products. The company also entered into tie up with the International Cricket Council (ICC), to be the global partner of the upcoming ICC Cricket World Cup, as a lead sponsor of the event. (BS)
- ❖ India's second largest petrochemical firm Indian Oil Corp (IOCL) is planning to add capacity across some of its refineries, besides expanding beyond its core business of pipeline, transportation and marketing, to gas, petrochemical and upstream. (BS)
- ❖ JSW Steel Ltd, the third largest Indian steel maker, said it has deferred the proposed acquisition of Italy's Lucchini SpV. (BS)
- ❖ India's domestic software market showed signs of revival in the first six months of 2014, growing 10.7% over a year ago. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.2465	(0.0005)	(0.04)
GBP-USD	1.5729	(0.0001)	(0.01)
USD-JPY	118.46	0.06	0.05

Bond Markets	Closing	Chg
10-yr bond	8.10	-5.4 bps
Interbank call	7.90	-3.28 bps



## Domestic News (Cont...)

❖ Country's largest car-maker Maruti Suzuki India (MSI) reported a 19.5 per cent increase in total sales in November at 110,147 units as against 92,140 units in the same month last year. (BS)

❖ In what could be a signal of the private sector's interest in the roads sector returning, the National Highways Authority of India (NHAI) has received 15-16 bids from private companies for expansion of the Delhi-Panipat expressway at a cost of around Rs 2,000 crore. (BS)

❖ Generic drugs maker Sun Pharma's merger with ailing Ranbaxy has hit the roadblock as the company has not received the approval from Competition Commission of India (CCI). (BS)

❖ Eicher Motors said its motorcycle division Royal Enfield reported a 52 per cent jump in total sales in November at 27,542 units as against 18,131 units in the same month last year. (BS)

❖ Spurning buy-out offers twice made by India's biggest hotel company it has proved to be a rueful decision for Bermuda-based Belmond and a boon for the Tata group-promoted Indian Hotels Company. (BS)

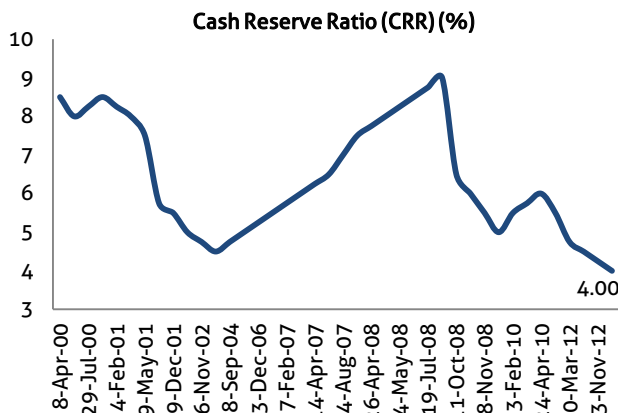
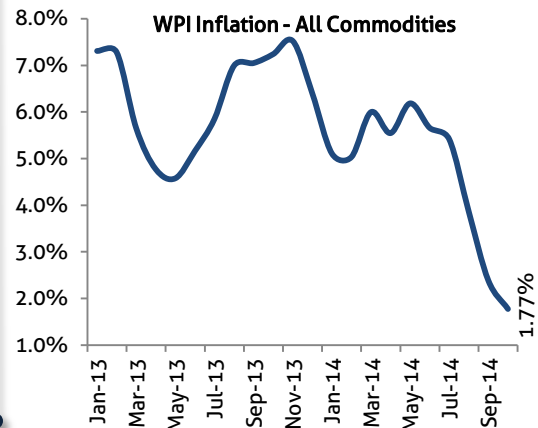
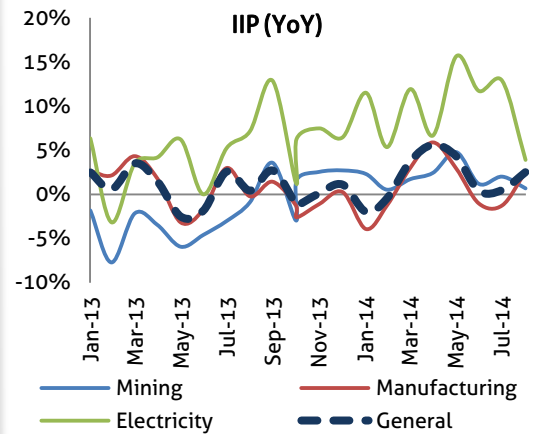
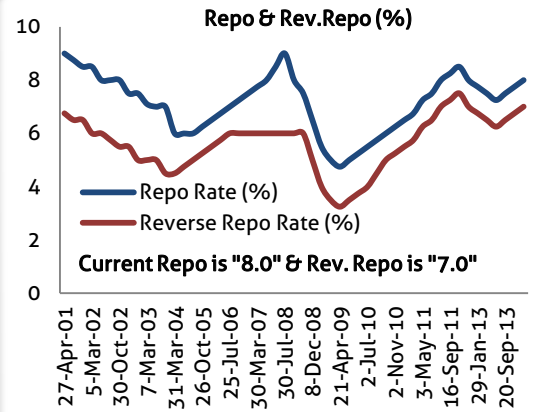
❖ In a surprise move, UB group chairman, Vijay Mallya has quit as a director of Mangalore Chemicals & Fertilizers - which was in the midst of a pitched takeover battle between Deepak Fertilisers and Kolkata based Advantz group led by Saroj Poddar. MCF has informed BSE that Mallya, a director on the board of the company, has resigned with immediate effect. Mallya was the chairman of the company. (BS)

❖ Country's largest car maker Maruti Suzuki India has recalled 3,796 units of its recently launched mid-sized sedan Ciaz, manufactured till November 7, to replace a faulty part of clutch operation system. (BS)

❖ Hinduja Group flagship company Ashok Leyland reported a 44% jump in total sales at 7,732 units for November, 2014, as against 5,375 units in the same month last year. (BS)

❖ On Sunday, JSW Steel group Chairman, Sajjan Jindal, said that its Bengal project, the single largest investment for the state at Rs 35,000 crore, had faced problems from the first day. (BS)

❖ TVS Motor has reported a 36% jump in sales during the month of November. Total two-wheeler sales rose to 210,979 units from 155,604 units during the same month last year. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Dec-14	Unitech Ltd	ADROIT SHARE & STOCK BROKER PVT. LTD.	SELL	14412878	18.8
1-Dec-14	Time Technoplast Limited	TIME EXPORTS PRIVATE LIMITED	SELL	1100000	51.3
1-Dec-14	Gitanjali Gems Limited	PLIRIS CAPITAL PRIVATE LIMITED	SELL	502109	60.1
1-Dec-14	Dolphin Offshore Enterpri	VORA FINANCIAL SERVICES PRIVATELIMITED	SELL	110482	179.6
1-Dec-14	KSS Limited	FLUX TRADE SOLUTIONS LLP	BUY	1051413	13.1

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Dec-14	GOKEK	ICICI BANK LIMITED	B	1,555,000	67.7
1-Dec-14	KSERASERA-\$	FLUX TRADE SOLUTIONS LLP	S	1,271,700	13.0
1-Dec-14	DELTALTD	ANIL KUMAR	B	84,600	78.1
1-Dec-14	SHRSHATEX	VINOD JATIA HUF	B	915,025	6.4
1-Dec-14	BHAGERIA	HI FI TRADING PRIVATE LIMITED	B	48,000	100.3

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500209	INFY	02-Dec-14	BONUS 1:1	03-Dec-14
536970	TFM46AA	02-Dec-14	Dividend On Mutual Fund	03-Dec-14
536970	TFM46AA	02-Dec-14	Redemption of Mutual Fund	03-Dec-14
536972	TFM46AB	02-Dec-14	Redemption of Mutual Fund	03-Dec-14
536971	TFM46AC	02-Dec-14	Dividend On Mutual Fund	03-Dec-14
536971	TFM46AC	02-Dec-14	Redemption of Mutual Fund	03-Dec-14
536973	TFM46AD	02-Dec-14	Redemption of Mutual Fund	03-Dec-14
500102	BALLARPUR	03-Dec-14	Dividend - Rs.0.20	-
509895	HINDMILL	04-Dec-14	Dividend - Rs.10.00	-
532174	ICICIBANK	04-Dec-14	Stock Split from Rs.10/- to Rs.2/-	05-Dec-14
533602	LESHAIND	04-Dec-14	Reduction of Capital	05-Dec-14
533602	LESHAIND	04-Dec-14	Scheme of Arrangement	05-Dec-14
532932	MANAKSIA	04-Dec-14	Scheme of Arrangement	05-Dec-14
500790	NESTLEIND	08-Dec-14	3rd Interim Dividend - Rs.-	09-Dec-14
537038	TFM46BA	09-Dec-14	Dividend On Mutual Fund	10-Dec-14
537038	TFM46BA	09-Dec-14	Redemption of Mutual Fund	10-Dec-14
537040	TFM46BB	09-Dec-14	Redemption of Mutual Fund	10-Dec-14
537039	TFM46BC	09-Dec-14	Dividend On Mutual Fund	10-Dec-14
537039	TFM46BC	09-Dec-14	Redemption of Mutual Fund	10-Dec-14
537041	TFM46BD	09-Dec-14	Redemption of Mutual Fund	10-Dec-14
524742	CAPPL	11-Dec-14	Final Dividend - Rs.4.00	-
532908	SHARONBIO	11-Dec-14	Dividend - Rs.0.36	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Dec-14	EUR	French Manufacturing PMI (Nov)			47.6
01-Dec-14	EUR	German Manufacturing PMI (Nov)			50
01-Dec-14	EUR	Italian GDP (QoQ) (Q3)			-0.001
01-Dec-14	EUR	Manufacturing PMI (Nov)			50.4
01-Dec-14	GBP	BoE Consumer Credit (Oct)			0.915B
01-Dec-14	USD	ISM Manufacturing Employment (Nov)			55.5
01-Dec-14	USD	ISM Manufacturing PMI (Nov)			59
02-Dec-14	USD	ISM - NY Business Conditions (Nov)			657.2
02-Dec-14	CNY	HSBC Services PMI (Nov)			52.9
03-Dec-14	EUR	Markit Composite PMI (Nov)			51.4
03-Dec-14	USD	Markit Composite PMI (Nov)			56.1
03-Dec-14	USD	Services PMI (Nov)			56.3
04-Dec-14	EUR	French Unemployment Rate (Q3)			10.2%
04-Dec-14	GBP	Interest Rate Decision (Dec)			0.5%
04-Dec-14	EUR	Interest Rate Decision (Dec)			0.1%
04-Dec-14	USD	Initial Jobless Claims			313K
05-Dec-14	EUR	GDP (QoQ) (Q3)			0.20%
05-Dec-14	USD	Unemployment Rate (Nov)			5.80%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Dec-14	INR	HSBC Markit Mfg PMI			
02-Dec-14	INR	Interest Rate Decision			
03-Dec-14	INR	HSBC Services PMI			

### Disclaimer:

This report is for the personal information of the authorized recipient and does not construe to be any investment, legal or taxation advice to you. Ashika Stock Broking Ltd., is not soliciting any action based upon it. This report is not for public distribution and has been furnished to you solely for your information and should not be reproduced or redistributed to any other person in any form. The report is based upon information that we consider reliable, but we do not represent that it is accurate or complete, and it should not be relied upon such. Ashika Stock Broking Ltd. or any of its affiliates or employees shall not be in anyway responsible for any loss or damage that may arise to any person from any inadvertent error in the information contained in this report. Ashika Stock Broking Ltd., or any of its affiliates or employees do not provide, at any time, any express or implied warranty of any kind, regarding any matter pertaining to this report, including without limitation the implied warranties of merchantability, fitness for a particular purpose, and non-infringement. The recipients of this report should rely on their own investigations. "Ashika Stock Broking Ltd., and/or its affiliates and /or employees may have interests/positions, financial or otherwise in the securities mentioned in this report."