

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6176	1.38	CNX IT	8821	0.83
Sensex	20792	1.25	BANK NIFTY	11154	2.27
DowJones	16086	(0.07)	S&P CNX 500	4770	1.30
Nasdaq	4060	0.37	CNX FMCG	17004	1.42
Hangseng	23881	0.39	CNX REALTY	174	1.49
Shanghai	2221	0.05	CNX AUTO	5283	0.14
Nikkei	15662	(0.41)	CNX ENERGY	7799	1.08
Strait Times	3176	(0.31)	CNX PHARMA	7352	1.15
Kospi	2045	(0.04)	Advances / Declines	BSE	NSE
Taiwan	8407	0.53	Advances	1455	792
FTSE	6651	(0.06)	Declines	1043	385
CAC	4295	(0.17)	Unchanged	174	52
DAX	9405	0.19	Total	2672	1229

Nifty Gainers		
Company	Price(Rs)	Chg(%)
JPASSOCIAT	54.00	9.20
NMDC	132.80	6.67
BANKBARODA	647.00	5.17
SSLT	183.10	4.57
BHEL	156.65	3.78

Nifty Losers		
Company	Price(Rs)	Chg(%)
M&M	946.00	(1.34)
HEROMOTOCO	2045.00	(0.69)
WIPRO	470.05	(0.54)
NTPC	147.50	(0.27)
ASIANPAINT	503.95	(0.18)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Shoppers Stop	6.65	0.68	10
VA Tech Wabag	1.02	0.12	8
Marico	3.22	0.40	8
Ashapura Mine	59.96	7.87	8
HDFC	24.62	3.26	8

Indian Forex	Closing	Chg	% Chg
USD/INR	62.395	0.005	0.01
GBP/INR	102.059	0.258	0.25
EUR/INR	84.976	0.221	0.26
JPY/INR	60.970	(0.130)	(0.21)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30400	230
Silver (Rs/1kg)	44364	249

Commodities	Price	% Chg.
Crude (US\$/BBL)	92.7	0.38
Brent (US\$/BBL)	109.7	(1.09)
Gold (US/oz)	1250.4	0.63
Silver (US\$/oz)	20.0	1.57
Copper (US\$/MT)	7027.0	0.56
Alum (US\$/MT)	1711.0	0.59
Zinc(US\$/MT)	1859.0	0.60

ADR	Cl. Values	% Chg.
ICICI Bank	35.86	1.34
HDFC Bank	33.18	0.39
Infosys	54.02	0.83
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	40.75	1.33
Wipro	11.67	0.19
Tata Motors	32.47	(0.25)

Market Sensor

US market settled mixed on Friday in a shortened holiday session, with the Dow and S&P 500 closing just below their previous record finishes, but both major indexes still recorded eight straight weekly gains. Dow Jones Industrial Average was down 0.07% or 10.92 points at 16086.41. Nasdaq Composite was up 0.37% or 15.14 points at 4059.89 Standard & Poor's 500 was down 0.08% or 1.42 points at 1805.81.

Indian market traded higher on the last trading day of the week, the rally was attributable amid speculation of better GDP numbers and rally in the global markets. Nifty ended the previous trading session with a gain of 1.38% or 84.25 points at 6176.10. On Thursday's trading session, FII's bought net Rs.745.16 Cr in cash market and bought net Rs.1884.51 in derivative segment. Whereas, DII sold net Rs.101.76 Cr in cash segment.

Coming to today's trade day Nifty to remain rangebound with positive bias while crucial intraday support seen at 6140 breach of which can witness lower levels of 6090. Resistance in the market exist at 6212.

Global News

❖Euro-area inflation stayed below 1 percent for a second month, less than half the European Central Bank's ceiling, underscoring the weakness in parts of the euro region's economy. (Bloomberg)

❖Sweden's economy grew less than anticipated in the third quarter amid pressure on the central bank to cut interest rates again. (Bloomberg)

❖Euro-area unemployment unexpectedly declined in October in a sign that a nascent recovery is starting to show its effect on the labor market. (Bloomberg)

❖Federal Reserve Chairman Ben S. Bernanke and his colleagues are suffering through their own form of cognitive dissonance: revealing new concerns about the economy's long-term prospects even as they forecast faster growth in 2014. (Bloomberg)

❖Greece's credit rating was raised two levels by Moody's Investors Service, which cited the country's progress in fiscal consolidation and an improving economic outlook. (Bloomberg)

Economic News

❖ The Indian economy may have bottomed out, if the 4.8% GDP growth in the July to September quarter is an indication. While this is marginally ahead of consensus estimates (4.6%), it needn't be interpreted as a recovery yet because services and industry are still struggling. (BS)

❖ India's fiscal deficit touched Rs 4.57 lakh crore or 84.4% of budget estimates in the first seven months of the current fiscal, reflecting signs of stress in government finances. (BS)

❖ Oil marketing companies are expected to announce a cut in petrol price and bulk diesel rates later. This follows a fall in global product prices which eased after Iran reached an agreement with western powers last Sunday. (BS)

❖ The higher than expected growth in the second quarter of 2013-14 is an indication of recovery in economy but some key sectors still need to perform better, India Inc said. (BS)

❖ The government slashed the import tariff value on gold and silver to \$405 per ten gram and \$642 per kg, respectively, in line with global trends. (BS)

❖ The government said it will not reduce the foreign direct investment (FDI) cap in the existing pharmaceutical companies. (BS)

❖ India's foreign exchange reserves rose in the week ending November 22 by \$2.69 billion to \$286.26 billion, shows Reserve Bank of India (RBI) data released Friday. (BS)

❖ India's sugar output declined by 67% to 8 lakh tonnes in the first two months of 2013-14 marketing year as a large number of mills, mainly in Uttar Pradesh, have not yet started crushing operations due to logjam over high cane prices. (BS)

❖ Retail inflation for industrial workers rose to 11.06% in October compared to 10.7% in the previous month mainly on account of rise in price of food items and higher electricity charges. (BS)

❖ The Department of Telecommunications (DoT), which has decided to auction the maximum available quantity of spectrum in January 2014, is likely to put more than 400MHz of airwaves on the block for commercial use. (BS)

❖ Alternate avenues for fund raising like insurance and pension funds need to be tapped into to meet India's growing capital requirements and to achieve the growth target of 8% during the 12th Plan period, says a study. (BS)

Domestic News

❖ Colgate Palmolive said its board approved second interim dividend of Rs 9 / equity share of Re 1, for the current financial year. (BS)

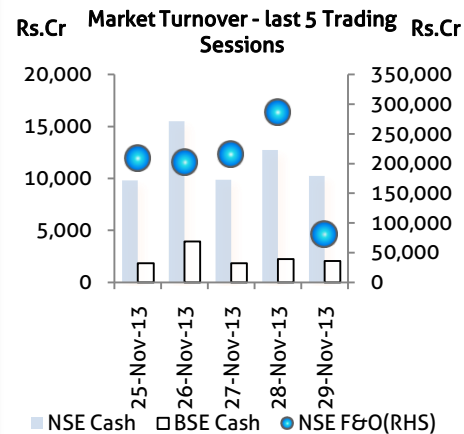
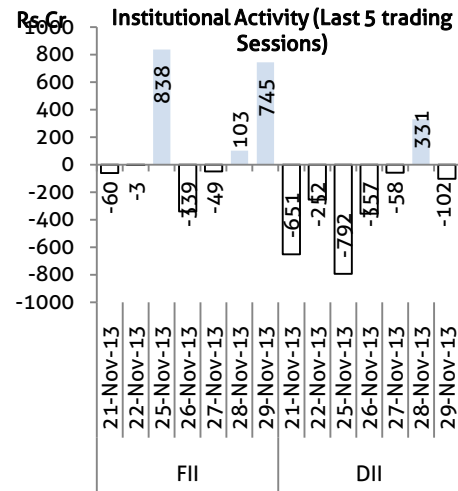
❖ Market regulator Sebi gave time till June next year for companies to align their employee benefit schemes with existing norms as it is reviewing the current framework for employee stock option and benefit plans. (BS)

❖ State-owned telecom operator BSNL, in partnership with Pantel Technologies, launched an entry-level feature phone for Rs 1,799 which comes bundled with 1,200 minutes of free talk time. (BS)

❖ The government has fixed a price band between Rs 85 and Rs 90 for the Follow-on Public Offer (FPO) of state-owned power transmission company Powergrid Corp (PGCIL). (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3591	(0.0015)	(0.11)
GBP-USD	1.6368	0.0025	0.15
USD-JPY	102.44	0.11	0.11

Bond Markets	Closing	Chg
10-yr bond	8.92	0.5 bps
Interbank call	7.61	-43.0 bps



Domestic News (Cont...)

❖ Within a few of days after the UK Office of fair Trade saying it was considering Diageo's offer to sell of majority of the assets of Whyte and Mackay to salvage its deal with United Spirits Ltd, the company has already received at least one open expression of interest. (BS)

❖ A week after the Supreme Court restricted Sahara chief Subrata Roy from leaving the country for failing to furnish proper title deeds worth Rs 20000 crore to Sebi, he said, Sahara would seek the court's permission to deposit the deeds to a nationalized bank instead. (BS)

❖ As the sales of Tata Motors small car Nano has failed to pick up, Ratan Tata, chairman emeritus of the Tata group, has said selling Nano as the 'cheapest car' was a mistake. (BS)

❖ The Government of Tamil Nadu has approached the Supreme Court of India seeking the apex court to quash the recent order of Madras High Court, which gave a green signal to the gas pipeline project of the Gas Authority of India Limited (GAIL) through seven districts of Tamil Nadu. (BS)

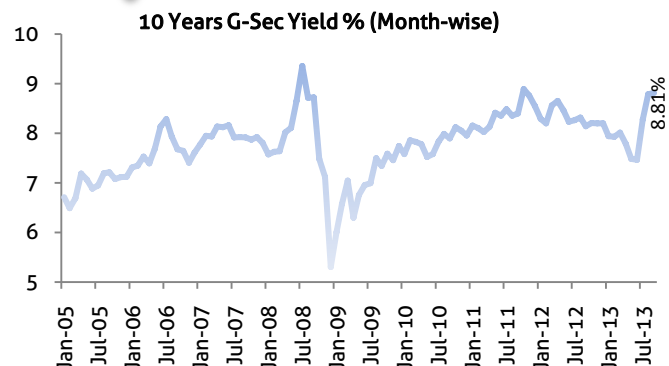
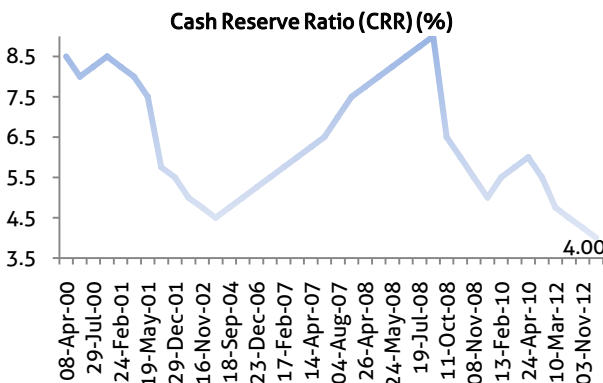
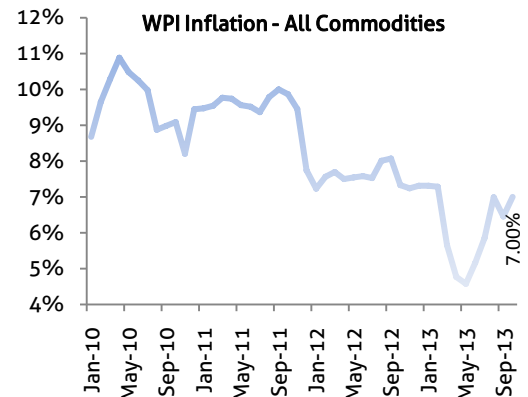
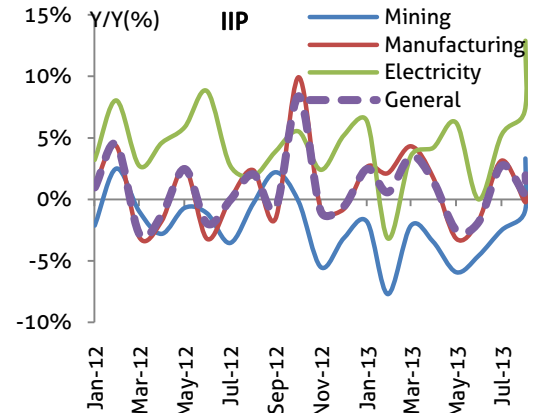
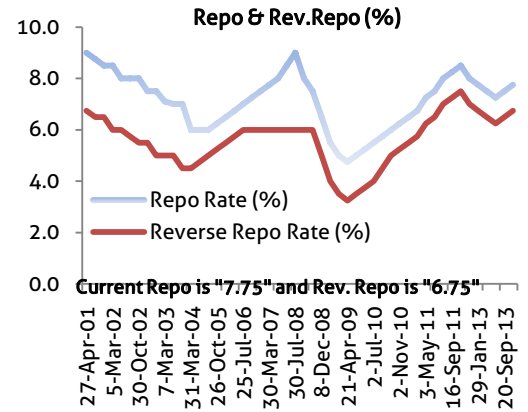
❖ At a time when the poor health of electricity distribution firms are raising concerns, NTPC chief Arup Roy Choudhury said the problems with state electricity boards are more of "political and social" in nature. (BS)

❖ Tarun Tejpal and Phaneesh Murthy have increased the headache for India Inc in more ways than one. Leading companies are rushing to take insurance cover that would cover the legal expenses of sexual harassment and other employee-related suits. (BS)

❖ NSEL investors forum held dharna outside Financial Technologies (FTIL) office at Andheri, a western suburb of Mumbai. However they couldn't get any assurance from the company on recovery of money. Meanwhile, three investors of the NSEL are understood to have filed a winding up petition against the Financial Technologies in the Bombay High Court. These investors have exposure of Rs 225 crore together. (BS)

❖ The finance ministry has advised its petroleum counterpart to consider imposing a cap on gas price under all contracts governing production sharing from fields, as part of its comment on the issue of pricing of shortfall gas from Reliance Industries operated KG-D6block. (BS)

❖ Engineering major Larsen and Toubro (L&T) said it is evaluating avenues to monetise certain assets of a subsidiary including through an initial public offering (IPO). (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Nov-13	Ashapura Minechem Ltd	ALBULA INVESTMENT FUND LTD	BUY	4107060	48.7
29-Nov-13	Ashapura Minechem Ltd	VOLCLAY INTERNATIONAL CORP	SELL	4107060	48.7

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Nov-13	Ashapura Mine	VOLCLAY INTERNATIONAL CORP	S	3,750,285	45.75
29-Nov-13	Parikh Herbals	HEENA RAMESHBHAI PATEL	P	1,055,347	22.42
29-Nov-13	Iris Mediaworks	AILISH TRADERS PRIVATE LIMITED	S	1,000,000	1.85
29-Nov-13	Gemstone Invest	PRITESHKUMAR SHAH	P	600,000	0.83
29-Nov-13	Bhageria Dye	VINODKUMAR KESHADEO BHAGERIA	S	250,000	26.15

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532908	Sharon Bio-\$	03-Dec-13	Dividend - Rs.1.50	-
500139	Fedders Lloyd	04-Dec-13	Dividend - Rs.1.00	-
531307	S R K Inds	04-Dec-13	Interim Dividend - Rs.0.05	05-Dec-13
533407	CIL Nova Petro	05-Dec-13	Consolidation of Shares	06-Dec-13
526881	Financial Tech	05-Dec-13	2nd Interim Dividend - Rs.-	06-Dec-13
500680	Pfizer	05-Dec-13	Interim Dividend - Rs.360.00	06-Dec-13
517385	SYMPHONY	05-Dec-13	Dividend - Rs.6.50	-
500095	Wyeth	05-Dec-13	Interim Dividend - Rs.145.00	06-Dec-13
522165	Indsil Hydro-\$	06-Dec-13	Dividend - Rs.0.50	-
506146	Visagar Poly	06-Dec-13	Final Dividend - Rs.0.10	-
500830	Colgate Palmolive	09-Dec-13	2nd Interim Dividend - Rs.9.00	10-Dec-13
500312	ONGC	10-Dec-13	Interim Dividend - Rs.-	11-Dec-13
506822	MP Poly	13-Dec-13	Stock Split from Rs.10/- to Re.1/-	16-Dec-13
521070	Alok Inds	18-Dec-13	Dividend - Rs.0.30	-
532281	HCL Tech	18-Dec-13	Final Dividend - Rs.6.00	-
519295	Bambino Agro	19-Dec-13	Dividend - Rs.1.50	-
532920	Empee Dist	19-Dec-13	Dividend - Rs.1.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
02-Dec-13	JPY	Capital Spending (YoY)			
02-Dec-13	CNY	Chinese HSBC Manufacturing PMI			50.4
02-Dec-13	EUR	Manufacturing PMI		51.5	51.5
02-Dec-13	GBP	Manufacturing PMI		56	56
02-Dec-13	USD	Construction Spending (MoM)		0.40%	
02-Dec-13	USD	ISM Manufacturing PMI		55	56.4
03-Dec-13	JPY	Monetary Base YoY			0.80%
03-Dec-13	GBP	Construction PMI		59	59.4
03-Dec-13	EUR	PPI (MoM)		-0.20%	0.10%
04-Dec-13	EUR	Services PMI		50.9	50.9
04-Dec-13	EUR	GDP (QoQ)		0.10%	0.10%
04-Dec-13	EUR	Retail Sales (MoM)		0.30%	-0.60%
04-Dec-13	USD	MBA 30-Year Mortgage Rate			4.48%
04-Dec-13	USD	ADP Nonfarm Employment Change		170K	130K
04-Dec-13	USD	Trade Balance		-40.00B	-41.80B
04-Dec-13	USD	ISM Non-Manufacturing PMI		55.1	55.4
04-Dec-13	USD	New Home Sales		430K	
05-Dec-13	GBP	Interest Rate Decision		0.50%	0.50%
05-Dec-13	EUR	Interest Rate Decision		0.25%	0.25%
05-Dec-13	USD	Continuing Jobless Claims		2,810K	2,776K
05-Dec-13	USD	GDP (QoQ)		3.00%	2.80%
05-Dec-13	USD	Initial Jobless Claims		320K	316K
05-Dec-13	USD	Real Consumer Spending			1.50%
05-Dec-13	USD	Factory Orders (MoM)		-1.00%	1.70%
06-Dec-13	USD	Core PCE Price Index (MoM)		0.10%	0.10%
06-Dec-13	USD	Nonfarm Payrolls		185K	204K
06-Dec-13	USD	Personal Spending (MoM)		0.20%	0.20%
06-Dec-13	USD	Unemployment Rate		7.20%	7.30%
06-Dec-13	USD	Michigan Consumer Sentiment		76	75.1
06-Dec-13	USD	Consumer Credit		14.50B	13.74B

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
02-Dec-13	INR	HSBC Markit Manufacturing PMI			49.6
04-Dec-13	INR	Indian HSBC Services PMI			47.1

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