

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 8525 | (0.36) | CNX IT | 11813 | (1.40) |
| Sensex | 28444 | (0.40) | BANK NIFTY | 18556 | 0.16 |
| DowJones | 17880 | 0.58 | S&P CNX 500 | 6896 | (0.03) |
| Nasdaq | 4756 | 0.60 | CNX FMCG | 20301 | 0.42 |
| Hangseng | 23836 | 0.77 | CNX REALTY | 4277 | 0.51 |
| Shanghai | 2809 | 1.66 | CNX AUTO | 8482 | (0.87) |
| Nikkei | 17847 | 1.04 | CNX ENERGY | 9152 | (0.55) |
| Strait Times | 3324 | 0.05 | CNX PHARMA | 11326 | 0.64 |
| Kospi | 1970 | 0.22 | Advances / Declines | BSE | NSE |
| Taiwan | 9148 | 1.25 | Advances | 1508 | 668 |
| FTSE | 6742 | 1.29 | Declines | 1419 | 527 |
| CAC | 4388 | 0.25 | Unchanged | 127 | 42 |
| DAX | 9934 | (0.30) | Total | 3054 | 1237 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| JINDALSTEL | 142.35 | 4.90 |
| HINDALCO | 171.80 | 2.63 |
| NMDC | 137.15 | 2.05 |
| IDFC | 160.70 | 1.93 |
| PNB | 1097.30 | 1.63 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| BPCL | 715.50 | (3.88) |
| ASIANPAINT | 773.00 | (3.02) |
| GAIL | 465.75 | (2.64) |
| M&M | 1263.00 | (2.48) |
| INFY | 2127.10 | (2.20) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| SPARC | 12.37 | 0.7 | 17 |
| EIHOTEL | 5.42 | 0.4 | 13 |
| BHARTIARTL | 26.23 | 2.1 | 12 |
| GPPL | 11.87 | 1.2 | 10 |
| NRBBEARING | 8.24 | 1.1 | 8 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|---------|--------|
| USD/INR | 61.926 | (0.212) | (0.34) |
| GBP/INR | 97.390 | 0.337 | 0.35 |
| EUR/INR | 77.215 | (0.153) | (0.20) |
| JPY/INR | 52.310 | 0.050 | 0.10 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 26525 | 605 |
| Silver (Rs/1kg) | 36200 | 900 |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 67.8 | (0.91) |
| Brent (US\$/BBL) | 71.3 | (0.97) |
| Gold (US/oz) | 1197.9 | (0.57) |
| Silver (US\$/oz) | 16.4 | 0.61 |
| Copper (US\$/MT) | 6455.0 | 1.10 |
| Alum (US\$/MT) | 2015.0 | (0.30) |
| Zinc(US\$/MT) | 2206.0 | 0.50 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 59.03 | 0.83 |
| HDFC Bank | 50.79 | (0.19) |
| Infosys | 69.11 | (0.73) |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 57.56 | (0.82) |
| Wipro | 12.98 | 0.10 |
| Tata Motors | 45.92 | 0.31 |

Market Sensor

US market rose on Tuesday, with the Dow striking another peak, as investors cheered better-than-expected November sales from Ford Motor, General Motors and Fiat Chrysler. Dow Jones Industrial Average was up 0.58% or 102.75 at 17879.55. Nasdaq Composite was up 0.60% or 28.46 points at 4755.81. Standard & Poor's 500 was up 0.64% or 13.11 points at 2066.55.

Indian equity market turned negative after RBI kept interest rate unchanged while street was expecting a possible rate cut. Nifty ended the previous trading session with a decline in of 0.36% or 31.20 points at 8524.70. On Tuesday's trading session, FII bought net Rs.106.82 Cr in cash market and bought net Rs.2631.02 in derivative segment. Whereas, DII sold net Rs.40.42 Cr in cash segment.

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

Global News

❖ The slide in oil prices to five-year lows offers China a double benefit as its leadership confronts the weakest expansion in a generation. (Bloomberg)

❖ Federal Reserve officials are signaling more confidence in the economy that moves them nearer to raising interest rates, and are stressing the liftoff is linked to data rather than dates to avoid unsettling markets. (Bloomberg)

❖ Australia's economy slowed for a second straight quarter, sending the currency to a four-year low and renewing pressure for further interest-rate cuts. (Bloomberg)

❖ A gauge of China's services climbed for the first time in three months as the industry helps underpin growth in the world's second-largest economy. (Bloomberg)

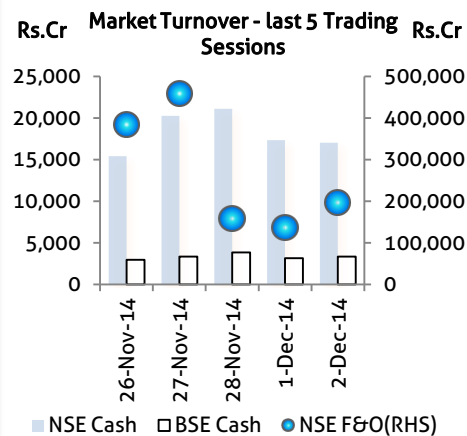
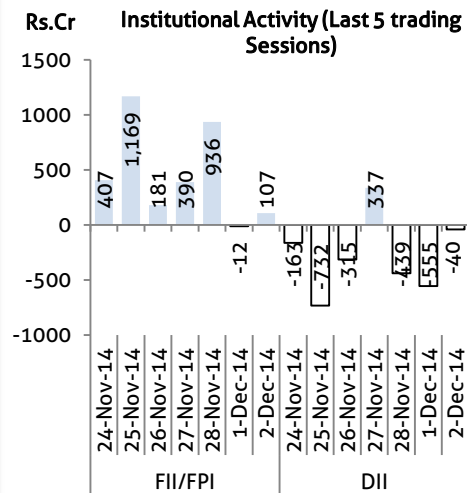
❖ Germany and France agreed to press ahead with plans for a Europe-wide investment program to spur growth, saying the boost should focus on transportation links, renewable energy and the digital economy. (Bloomberg)

Economic News

- ❖ The Union Ministry of Petroleum and Natural Gas (MOPNG) on Tuesday said the reduction in crude oil prices will see the import bill fall by a similar percentage. (BS)
- ❖ The Modi government will have to intensify its efforts to promote local manufacturing of electronics to counter the possible fallouts from the US-China trade pact that removes import tariffs on a host of new electronic items. (BS)
- ❖ Reserve Bank of India (RBI) Governor Raghuram Rajan on Tuesday left the repo rate unchanged at 8t% — a fifth straight bi-monthly monetary policy review in which the status quo was maintained. (BS)
- ❖ The Reserve Bank of India made all the right noises on policy rates in the coming year, but what is apparent is that Governor Raghuram Rajan will take follow-up action only when the government does its part to manage the fiscal deficit and take key measures to revive investments. (BS)
- ❖ Japanese brokerage Nomura said inflation levels in India are close to post global financial crisis lows, and retained its positive stance on the country's stock market. (BS)
- ❖ In conversation with Jinsy Mathew, Upasna Bhardwaj, economist at ING Vysya Bank shares her view of 's Policy. Even as she is optimistic about a rate cut in near future, an unfavourable base effect may weigh the inflation data in 2015. (BS)
- ❖ As the government plans to conduct 3G spectrum auction along with 2G radio waves sale in February, it has asked telecom regulator Trai to expedite the base price recommendations for it. (BS)
- ❖ The Commission for Agriculture Cost and Prices (CACP) has recommended a rationalisation of tariff structure for oilseed which currently remains inverted. (BS)
- ❖ The government on Tuesday raised factory gate duties on petrol by Rs 2.25 a litre and on diesel by Re 1 per litre with immediate effect, the finance ministry said in a statement to Parliament. (BS)
- ❖ Disappointed by the Reserve Bank of India's decision to keep interest rates unchanged, top CEOs and their finance heads are expecting the RBI to cut rates early next year by when the inflation will be under full control. (BS)
- ❖ Second time in a row, the government has used falling global petroleum prices to its advantage by increasing the excise duty on petrol and diesel instead of passing a full reduction in prices to consumers. (BS)
- ❖ RBI governor Raghuram Rajan's announcement on debt restructuring of stranded projects will ease cash flow situation and improve their financial health, said industry experts and executives from power generation companies. (BS)

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|--------|-------|
| EUR-USD | 1.2385 | 0.0002 | 0.02 |
| GBP-USD | 1.5642 | 0.0005 | 0.03 |
| USD-JPY | 119.40 | 0.19 | 0.16 |

| Bond Markets | Closing | Chg |
|----------------|---------|----------|
| 10-yr bond | 8.08 | -2.8 bps |
| Interbank call | 7.92 | 2.17 bps |



Domestic News

- ❖ India's Small and Medium Enterprises (SMEs) in pharmaceuticals sector, traditionally dependent on domestic market, are rapidly expanding and emerging as MNCs based on exports-led growth strategies, according to a recent report by CPhI India. (BS)
- ❖ MediGainHealth Private Ltd, which provides revenue cycle management (RCM) solutions and analytics for the healthcare industry, said that it plans to expand its Indian operations five-fold with the recently obtained \$38 million in-growth capital from Prudential Capital Group (Prudential). (BS)

Domestic News (Cont...)

❖ In view of the success of the maiden CeBIT event in India, Hannover Milano Fairs has decided to hold a second edition of the expo between October 28 and 30, 2015. The event will be held at Bengaluru International Exhibition Centre, which was the venue for the event this year as well. The focus of the event next year would be digital economy and digital transformation. (BS)

❖ The Intellectual Property Appellate Board (IPAB) has asked UK-based luxury bedding and upholstery firm Hypnos Ltd, which supply beds to the Royal family in Britain, and Hosur Coir Foam Pvt Ltd to explore possibilities of amicable settlement in a dispute on trade mark Hypnos for their beds and mattress products. (BS)

❖ E-commerce will be covered under the Consumer Protection Act and the central government will not face any loss in indirect tax revenue due to expansion of online retail business, Parliament was informed on Tuesday. (BS)

❖ Gateway Distriparks has appointed Sachin Bhanushali as the Chief Executive Officer of its rail business, Gateway Rail Freight, effective 1 December 2014. (BS)

❖ Tata Manza, the only mid-size sedan sold by Tata Motors, is struggling to keep up with the competition, fueling possibilities of a potential withdrawal from the market. (BS)

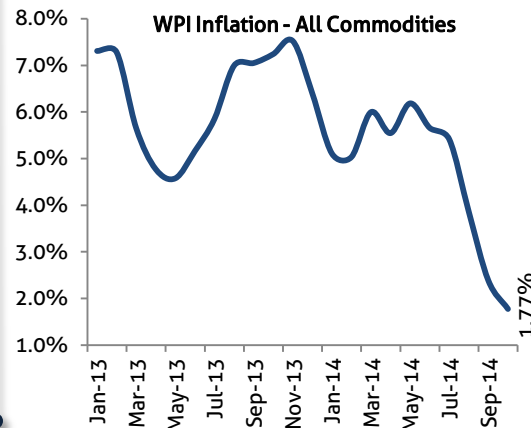
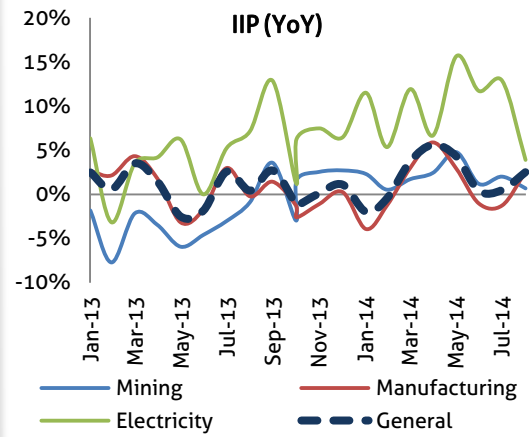
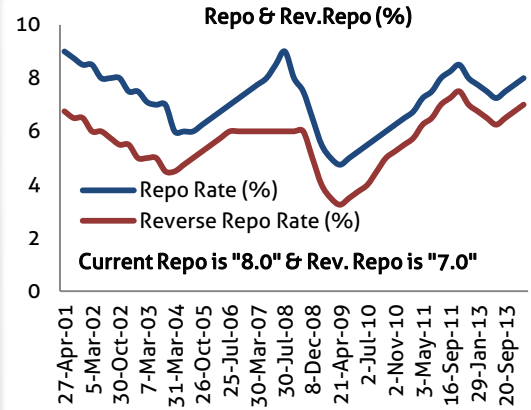
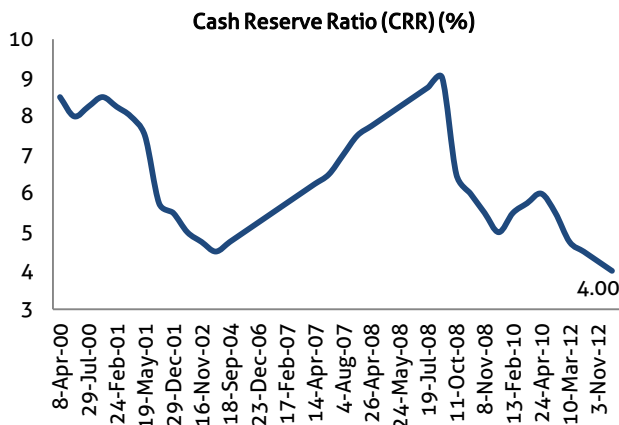
❖ Wind turbine maker Suzlon's wholly owned subsidiary Servion SE has appointed Kirti Vagadia as the new Chief Financial Officer. (BS)

❖ Hyderabad-based Oil Country Tubular Limited (OCTL), a manufacturer of the drilling pipes used in the oil exploration, considers shifting its manufacturing facility from Telangana owing to the ongoing dispute with the workers. (BS)

❖ Bajaj Auto reported 6% decline in motorcycle sales at 2,61,94 units in November 2014. (BS)

❖ The prolonged shutdown of Haldia Petrochemicals Ltd (HPL), has severely affected the downstream companies leading to closure of almost 150 units in the region. (BS)

❖ TAFE Motors and Tractors Ltd (TAFE) has invested around \$140 million by way of equity in US-based Agco Corporation. The US company is a worldwide manufacturer and distributor of agricultural equipment, with whom TAFE has had an ongoing relationship for over 50 years. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|---------------------------|---|----------|-------------|-------|
| 2-Dec-14 | Sunil Hitech Engr Ltd | BESSEMER VENTURE PARTNER TRUST | SELL | 380013 | 150.0 |
| 2-Dec-14 | Dolphin Offshore Enterpri | PARAM CAPITAL RESEARCH PVT LTD | BUY | 100174 | 180.5 |
| 2-Dec-14 | Dr. Datson's Labs Ltd | MANAV N PATEL | SELL | 758454 | 12.0 |
| 2-Dec-14 | Vikas GlobalOne Ltd | OJAS ASSET RECONSTRUCTION COMPANY LIMITED | BUY | 800000 | 6.5 |
| 2-Dec-14 | Sanco Industries Ltd. | MEENAL GOEL | BUY | 104000 | 20.0 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|---------------|--------------------------------|----------|-------------|-------|
| 2-Dec-14 | NYSSACORP | NIRSHILP SECURITIE PVT LTD-BSE | B | 185,000 | 99.4 |
| 2-Dec-14 | MAHAREM | KIRAN KUMAR M | S | 57,000 | 301.6 |
| 2-Dec-14 | DOLPHINOFF-\$ | Quadeye Securities Pvt Ltd | B | 87,014 | 179.4 |
| 2-Dec-14 | KSERASERA-\$ | FLUX TRADE SOLUTIONS LLP | S | 1,158,488 | 13.0 |
| 2-Dec-14 | CML | MEERA MILIND NARVEKAR | S | 30,000 | 397.6 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|------------|-----------|------------------------------------|-------------|
| 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 |
| 533365 | IPRU1083 | 10-Dec-14 | Redemption of Mutual Fund | 11-Dec-14 |
| 533367 | IPRU1084P | 10-Dec-14 | Dividend On Mutual Fund | 11-Dec-14 |
| 533367 | IPRU1084P | 10-Dec-14 | Redemption of Mutual Fund | 11-Dec-14 |
| 533361 | IPRU1286 | 10-Dec-14 | Redemption of Mutual Fund | 11-Dec-14 |
| 533363 | IPRU1287P | 10-Dec-14 | Redemption of Mutual Fund | 11-Dec-14 |
| 533363 | IPRU1287P | 10-Dec-14 | Dividend On Mutual Fund | 11-Dec-14 |
| 533368 | IPRU1690 | 10-Dec-14 | Dividend On Mutual Fund | 11-Dec-14 |
| 533368 | IPRU1690 | 10-Dec-14 | Redemption of Mutual Fund | 11-Dec-14 |
| 533364 | IPRU1691 | 10-Dec-14 | Dividend On Mutual Fund | 11-Dec-14 |

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 | | | |

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