

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8382	(0.52)	CNX IT	11524	0.10
Sensex	28033	(0.46)	BANK NIFTY	17586	(0.66)
DowJones	17686	(0.01)	S&P CNX 500	6798	(0.58)
Nasdaq	4676	(0.57)	CNX FMCG	20107	(0.24)
Hangseng	23447	0.32	CNX REALTY	3957	(1.64)
Shanghai	2454	0.13	CNX AUTO	8379	(0.75)
Nikkei	17292	0.02	CNX ENERGY	9409	(1.37)
Strait Times	3331	(0.11)	CNX PHARMA	11101	(0.08)
Kospi	1955	(0.59)	Advances / Declines	BSE	NSE
Taiwan	9056	1.03	Advances	1201	530
FTSE	6697	(0.19)	Declines	1861	1007
CAC	4266	0.09	Unchanged	93	56
DAX	9473	0.17	Total	3155	1593

Nifty Gainers		
Company	Price(Rs)	Chg(%)
DRREDDY	3518.40	2.49
HCLTECH	1633.00	2.02
TECHM	2637.65	1.59
DLF	140.70	1.41
ZEEL	388.55	1.36

Nifty Losers		
Company	Price(Rs)	Chg(%)
JINDALSTEL	151.00	(3.73)
TATASTEEL	471.10	(3.15)
GAIL	476.00	(2.92)
CAIRN	260.75	(2.81)
SSLT	240.00	(2.81)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
ATULAUTO	4.87	0.6	8
MPHASIS	1.70	0.3	7
HERITGFOOD	1.55	0.3	6
SBBJ	2.96	0.5	6
SRF	7.95	1.5	5

Indian Forex	Closing	Chg	% Chg
USD/INR	61.828	0.020	0.03
GBP/INR	96.557	(0.210)	(0.22)
EUR/INR	77.421	0.328	0.43
JPY/INR	52.710	(0.260)	(0.49)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26780	58
Silver (Rs/1kg)	36050	(273)

Commodities	Price	% Chg.
Crude (US\$/BBL)	74.5	0.12
Brent (US\$/BBL)	78.1	(0.61)
Gold (US/oz)	1181.1	(1.00)
Silver (US\$/oz)	16.1	(0.37)
Copper (US\$/MT)	6715.0	0.46
Alum (US\$/MT)	2025.0	0.47
Zinc(US\$/MT)	2231.5	(0.29)

ADR	Cl. Values	% Chg.
ICICI Bank	58.59	0.10
HDFC Bank	52.44	(0.19)
Infosys	67.22	(0.11)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	56.78	0.53
Wipro	12.31	(0.13)
Tata Motors	46.70	(0.46)

Market Sensor

US market were little changed on Wednesday, with benchmarks at or near all-time highs, as Wall Street took in stride minutes from the Federal Reserve's last policy meeting, which had some central bankers concerned prices are not increasing rapidly enough. Dow Jones Industrial Average was down 0.01% or 2.09 points at 17685.73. Nasdaq Composite was down 0.57% or 26.73 points at 4675.71. Standard & Poor's 500 was down 0.15% or 3.08 points at 2048.72.

Indian equity market witnessed profit booking ahead of the RBI credit policy due on 2nd December however OECD said the Indian economy is showing signs of a turnaround. Nifty ended the previous trading session with a decline of 0.52% or 43.60 points at 8382.30. On Wednesday's trading session, FII's bought net Rs.71.8 Cr in cash market and sold net Rs.1321.18 in derivative segment. Whereas, DII sold net Rs.491.26 Cr in cash segment.

Coming to today's trade Nifty might remain volatile, crucial intraday support seen at 8350 followed by 8320 while resistance exist at 8410 and then at 8470.

Global News

❖ A Chinese manufacturing gauge fell to a six-month low in November, suggesting the world's second-largest economy is slowing further in the fourth quarter. (Bloomberg)

❖ Japan's exports rose the most in eight months in October, supporting an economy that fell into recession last quarter. (Bloomberg)

❖ Federal Reserve policy makers are on guard for signs that investors and the public are losing confidence in their ability to keep prices stable in a moderate recovery with little wage growth. (Bloomberg)

❖ Alan Greenspan couldn't control long-term interest rates a decade ago, and bond investors are betting Janet Yellen's luck will be no better. (Bloomberg)

❖ Indonesian President Joko Widodo's ability to weather opposition to higher fuel prices hinges on convincing the public that billions of dollars in savings will be spent to improve their lives. (Bloomberg)

Economic News

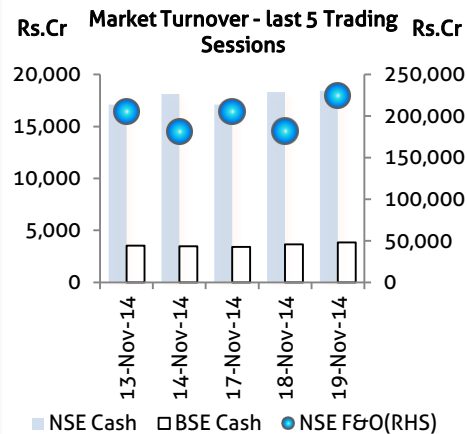
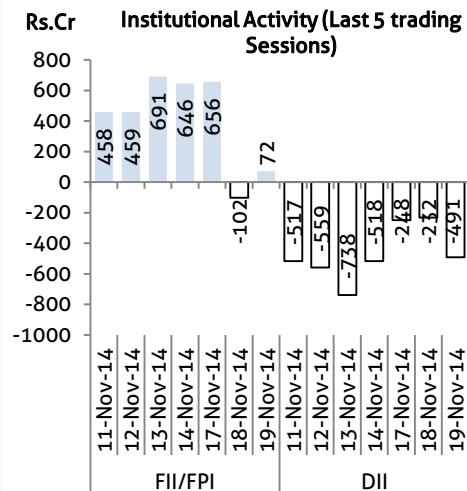
- ❖ India's economy will accelerate in 2015 but will fail to attain the heady growth rates of the past decade without sweeping structural reforms, the Organisation for Economic Cooperation and Development said on Wednesday. (BS)
- ❖ Asserting his willingness to make changes in the Special Economic Zone (SEZ) policy, Maharashtra Chief Minister Devendra Fadnavis has said the only way to boost the state's economy is by easing the business culture. (BS)
- ❖ In a surprise development Japan's Prime Minister Shinzo Abe called for snap polls in mid-December 2014 and suspended a planned sales tax increase. Abe is seeking a renewed mandate for his economic policies that would have helped Japan to come out of two decades of economic stagnation. (BS)
- ❖ Despite high property prices, India's commercial capital Mumbai has once again emerged as the most popular and attractive property investment hotspot among the UAE-based Indian expats. (BS)
- ❖ Even as Japan fell into recession, the BJP government in Maharashtra and the Mumbai Metropolitan Region Development Authority (MMRDA) said they do not see any problem in getting loan from Japanese International Co-operation Agency (JICA) for the Rs 11,000-crore Mumbai Trans Harbour Link (MTHL) project. Both the government and MMRDA are pursuing the matter with JICA and hope to get its clearance for loan supply for the much ambitious 22-km long project. (BS)
- ❖ The Centre has sought comments from people on simplifying pension procedures and taking various measures related to the welfare of pensioners. (BS)
- ❖ Asian Development Bank (ADB) will provide \$350 million loan assistance for upgradation of district roads in Madhya Pradesh. (BS)
- ❖ US-based premium electric car maker Tesla Motors is keen to enter the Indian market and has even identified the country as one of the possible locations to set up a manufacturing plant in Asia. (BS)
- ❖ As the government gets ready to kick-off this year's disinvestment drive, the Power Ministry wants to 'wait' and 'watch' on sale of stake in state-run hydel producer NHPC. (BS)
- ❖ The government plans to replace bilateral investment protection treaties with a new pact that seeks to plug loopholes and enhance legal protection of foreign investors in India as well as Indian investments abroad. (BS)

Domestic News

- ❖ Bell Helicopter and Textron Systems have signed a multi-million dollar global deal with India's Dynamic Technologies for supply of major airframe assemblies for Bell 407 GX helicopters. (BS)
- ❖ Some of the world's marquee private equity (PE) firms have lost their investments in India, mainly due to governance issues in their investee companies. Many of the dud investments were made between 2005 and 2008 and in most cases, the PE investors did not even get adequate post-investment rights. The matters were further compounded by poor reporting to PE funds as well as investee firms' lackadaisical attitude towards investing in systems, procedures and controls. (BS)
- ❖ OMCs have cancelled tenders to procure ethanol from sugar millers over price differences. (BS)

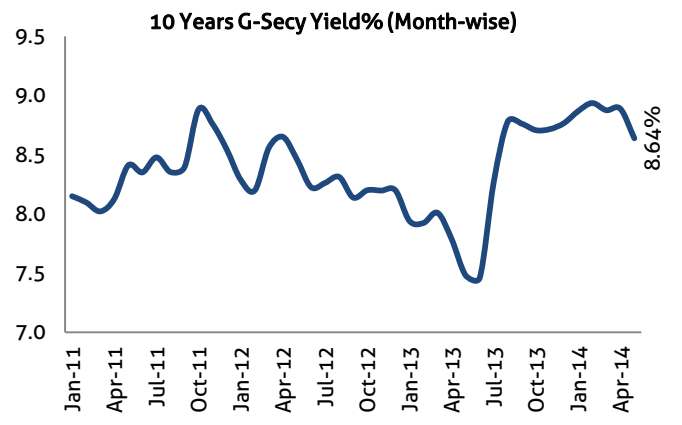
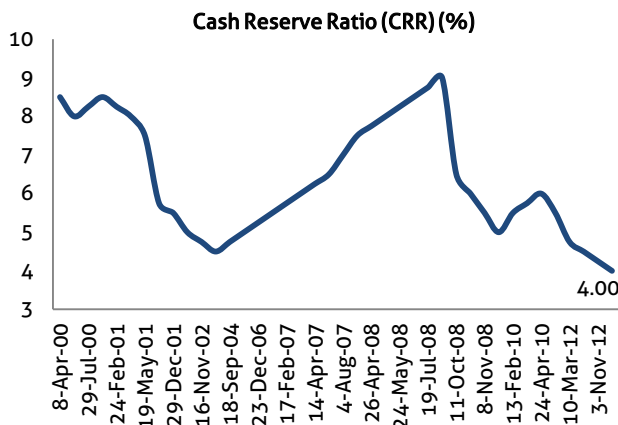
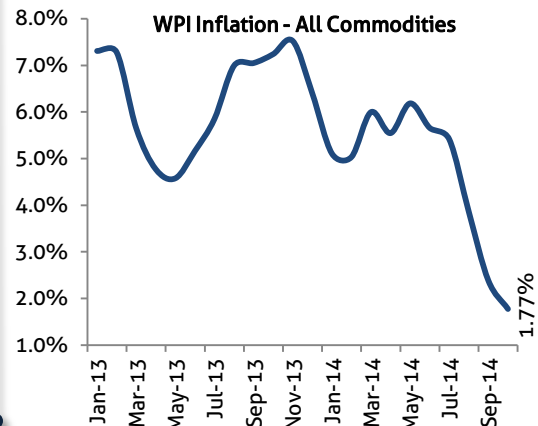
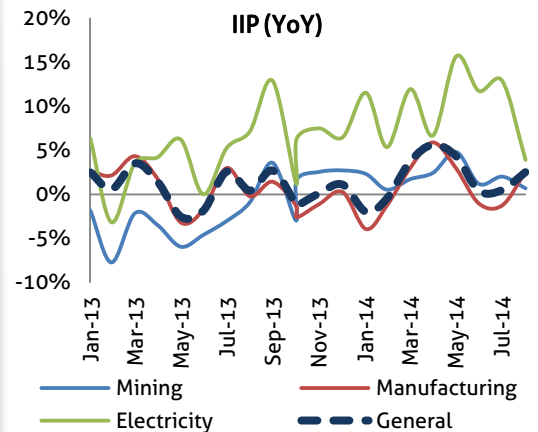
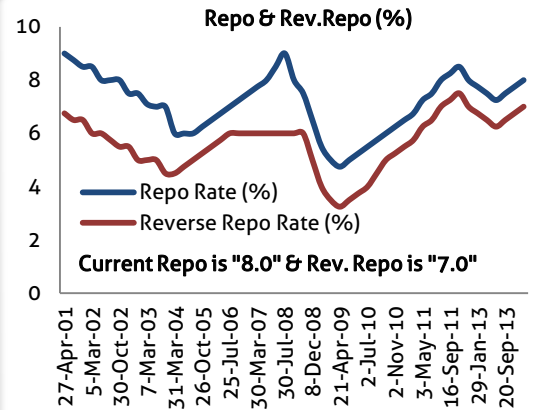
Global Forex	Closing	Chg	% Chg
EUR-USD	1.2542	(0.0012)	(0.10)
GBP-USD	1.5671	(0.0011)	(0.07)
USD-JPY	118.17	0.20	0.17

Bond Markets	Closing	Chg
10-yr bond	8.23	-0.1 bps
Interbank call	7.80	-8.28 bps



Domestic News (Cont...)

- ❖ The Trent-Tesco joint venture has signed four properties for stores under the Star brand, said a source in the know. (BS)
- ❖ American drug regulator US FDA late Tuesday started a surprise inspection of Dr Reddy's Vizag plant. (BS)
- ❖ Bengaluru-based real estate companies such as Prestige, Puravankara and others are looking to enter new cities such as Pune, Mumbai and expand in Southern cities such as Chennai, Hyderabad, Mangaluru for additional growth. (BS)
- ❖ After signing the agreement in March this year, the Trent-Tesco joint venture company has signed four properties for stores under the Star brand, said a source in the know. (BS)
- ❖ After witnessing long, trying times due to a faltering economy, Indian companies may experience better credit conditions in 2015 on prospects of an economic recovery and pro-market policies, global rating agency Moody's said Wednesday. (BS)
- ❖ Fitch Ratings has assigned BBB- rating to state-run NTPC's proposed \$2 billion medium-term note programme. (BS)
- ❖ Apollo Tyres announced the redesignation of Sunam Sarkar, President and Chief Financial Officer, to the new position of President and Chief Business Officer, and his relocation to Singapore. (BS)
- ❖ International property players and equity firms from Malaysia, Singapore and other countries of Asia and West Asia are checking out the India market, following the government move to relax foreign investment norms in the real estate sector. (BS)
- ❖ Online restaurant guide Zomato has raised \$60 million (over Rs 365 crore) from Vy Capital and existing investors Info Edge (India) Ltd and Sequoia Capital to fund global expansion and new product development. (BS)
- ❖ Hyundai Mobis, that supplies automotive service parts for Hyundai cars, has launched its maiden distributorship and warehouse in the Lucknow region for Uttar Pradesh. (BS)
- ❖ India's second largest information technology (IT) services company Infosys may have put an end to several of its business-related issues, but the Bengaluru-based company is now faced with another sticky situation. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Nov-14	CCL Products (I) Ltd	KAMIN LAUREN FEUER	SELL	764752	149.4
19-Nov-14	Bhartiya Intl Limited	MORGAN STANLEY ASIA (SINGAPORE) PTE	BUY	274048	400.0
19-Nov-14	Patel Engineering Limited	PRAFULLA KISAN NANDA	SELL	463997	111.4
19-Nov-14	ITD Cementation India Lim	HDFC TRUSTEE CO.LTD.A/C HDFC INFRASTRUCTURE FUND	BUY	119000	419.0
19-Nov-14	Amrutajan Health Ltd	ADIHEMSHREE FINANCIAL	SELL	75000	325.0

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Nov-14	ATULAUTO	BIRLA SUN LIFE MUTUAL FUND BSL IND EXCEL OFFSHORE FD	B	175,000	397.1
19-Nov-14	ADHUNIKIND	VRINDAVAN ADVISORY SERVICES LLP	B	350,000	150.5
19-Nov-14	ITDCEM	HDFC MUTUAL FUND	B	119,000	419.0
19-Nov-14	POKARNA	ASHISH RAMESHCHANDRA KACHOLIA	B	50,000	552.7
19-Nov-14	SAHPETRO	RAJASTHAN GLOBAL SECURITIES LTD	S	302,598	37.5

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500003	AEGISLOG	20-Nov-14	Interim Dividend - Rs.2.50	21-Nov-14
535142	CNEL	20-Nov-14	Right1:2	21-Nov-14
526735	EXCAST	20-Nov-14	Stock Split from Rs. 10/- to Rs. 2/-	21-Nov-14
526881	FINANTECH	20-Nov-14	2nd Interim Dividend - Rs.5.00	21-Nov-14
500150	FOSECOIND	20-Nov-14	3rd Interim Dividend - Rs.6.00	21-Nov-14
505714	GABRIEL	20-Nov-14	Interim Dividend - Rs.0.45	21-Nov-14
533752	IDFC3YS5D	20-Nov-14	Redemption of Mutual Fund	21-Nov-14
533751	IDFC3YS5G	20-Nov-14	Redemption of Mutual Fund	21-Nov-14
533753	IDFC3YS5QD	20-Nov-14	Redemption of Mutual Fund	21-Nov-14
537708	KOTAKNIFTY	20-Nov-14	Dividend On Mutual Fund	21-Nov-14
590107	KOTAKPSUBK	20-Nov-14	Dividend On Mutual Fund	21-Nov-14
532985	KTKSENSEX	20-Nov-14	Dividend On Mutual Fund	21-Nov-14
522249	MAYURUNIQ	20-Nov-14	2nd Interim Dividend - Rs.0.75	21-Nov-14
534312	MTEDUCARE	20-Nov-14	Interim Dividend - Rs.0.60	21-Nov-14
531898	SANGUI	20-Nov-14	Stock Split from Rs.10/- to Re.1/-	21-Nov-14
500112	SBIN	20-Nov-14	Stock Split from Rs.10/- to Re.1/-	21-Nov-14
505075	SETCO	20-Nov-14	Interim Dividend - Rs.1.50	21-Nov-14
536894	TFM45CA	20-Nov-14	Dividend On Mutual Fund	21-Nov-14
536894	TFM45CA	20-Nov-14	Redemption of Mutual Fund	21-Nov-14
536896	TFM45CB	20-Nov-14	Redemption of Mutual Fund	21-Nov-14
536895	TFM45CC	20-Nov-14	Dividend On Mutual Fund	21-Nov-14
536895	TFM45CC	20-Nov-14	Redemption of Mutual Fund	21-Nov-14

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
17-Nov-14	USD	NY Empire State Manufacturing Index (Nov)			6.17
17-Nov-14	USD	Industrial Production (MoM) (Oct)			1.00%
17-Nov-14	USD	Manufacturing Production (MoM) (Oct)			0.50%
18-Nov-14	GBP	CPI (YoY) (Oct)			1.20%
18-Nov-14	GBP	PPI Input (YoY) (Oct)			-7.40%
18-Nov-14	GBP	PPI Output (YoY) (Oct)			-0.40%
18-Nov-14	GBP	RPI (YoY) (Oct)			2.30%
18-Nov-14	USD	PPI (MoM) (Oct)			-0.10%
18-Nov-14	USD	NAHB Housing Market Index (Nov)			54
18-Nov-14	USD	Overall Net Capital Flow (Sep)			74.50B
18-Nov-14	USD	TIC Net Long-Term Transactions (Sep)			52.1B
19-Nov-14	USD	MBA 30-Year Mortgage Rate			4.19%
19-Nov-14	USD	Building Permits (MoM) (Oct)			2.80%
19-Nov-14	USD	Housing Starts (MoM) (Oct)			6.30%
19-Nov-14	JPY	Trade Balance (Oct)			-958B
19-Nov-14	JPY	Manufacturing PMI (Nov)			52.8
19-Nov-14	CNY	HSBC Manufacturing PMI (Nov)			50.4
20-Nov-14	EUR	Manufacturing PMI (Nov)			50.6
20-Nov-14	EUR	Services PMI (Nov)			52.3
20-Nov-14	GBP	Retail Sales (MoM) (Oct)			-0.30%
20-Nov-14	GBP	CBI Industrial Trends Orders (Nov)			-6
20-Nov-14	USD	CPI (MoM) (Oct)			0.10%
20-Nov-14	USD	Manufacturing PMI (Nov)			55.9
20-Nov-14	USD	Existing Home Sales (Oct)			5.17M
20-Nov-14	USD	Philadelphia Fed Manufacturing Index (Nov)			20.7
20-Nov-14	EUR	Consumer Confidence (Nov)			-11.1
21-Nov-14	GBP	Public Sector Net Borrowing (Oct)			11.07B
21-Nov-14	USD	KC Fed Manufacturing Index (Nov)			3

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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