

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5999	(2.02)	CNX IT	8915	(0.98)
Sensex	20229	(1.97)	BANK NIFTY	10967	(1.97)
DowJones	16010	0.69	S&P CNX 500	4720	(1.08)
Nasdaq	3969	1.22	CNX FMCG	16823	(0.91)
Hangseng	23728	0.62	CNX REALTY	174	(0.34)
Shanghai	2208	0.08	CNX AUTO	5180	(1.35)
Nikkei	15542	1.15	CNX ENERGY	7746	(1.16)
Strait Times	3169	(0.12)	CNX PHARMA	7401	(1.29)
Kospi	2003	0.48	Advances / Declines	BSE	NSE
Taiwan	8123	0.29	Advances	922	215
FTSE	6681	0.00	Declines	1552	676
CAC	4254	(0.34)	Unchanged	137	27
DAX	9196	(0.07)	Total	2611	918

Nifty Gainers		
Company	Price(Rs)	Chg(%)
MARUTI	1655.50	0.34
CAIRN	319.55	0.30
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Nifty Losers		
Company	Price(Rs)	Chg(%)
ACC	1025.00	(3.74)
INDUSINDBK	405.00	(3.61)
SSLT	180.10	(3.56)
PNB	519.10	(3.50)
AMBUJACEM	171.00	(3.44)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Kirloskar Oil	28.85	0.01	2209
Birla Corp	2.09	0.01	161
Uttam Galva	26.04	0.78	33
Wyeth	1.60	0.06	29
Clarix Life	2.93	0.28	11

Indian Forex	Closing	Chg	% Chg
USD/INR	62.890	0.331	0.53
GBP/INR	101.139	0.364	0.36
EUR/INR	84.418	(0.292)	(0.35)
JPY/INR	62.450	(0.060)	(0.10)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30800	(375)
Silver (Rs/1kg)	45225	(445)

Commodities	Price	% Chg.
Crude (US\$/BBL)	95.2	1.69
Brent (US\$/BBL)	110.0	2.05
Gold (US/oz)	1245.0	(0.17)
Silver (US\$/oz)	20.1	0.80
Copper (US\$/MT)	6992.0	0.17
Alum (US\$/MT)	1730.5	(0.55)
Zinc(US\$/MT)	1859.0	(0.16)

ADR	Cl. Values	% Chg.
ICICI Bank	33.69	(0.60)
HDFC Bank	32.13	(0.45)
Infosys	53.52	(0.89)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	38.72	(0.35)
Wipro	11.32	(0.09)
Tata Motors	30.12	(0.32)

Market Sensor

U.S. stocks hit record highs on Thursday after a strong weekly jobless claims report gave investors a double shot of optimism. The Dow Jones Industrial Average closed above 16,000 for the first time ever amid sentiments that the U.S. economy is improving though the Federal Reserve will continue stimulating the economy with stock-boosting bond purchases in the coming months to be sure recovery can stand on its own. The Dow Jones industrial average ended down 66.21 points, or 0.41%, at 15,900.82. The Standard & Poor's 500 Index was down 6.50 points, or 0.36%, at 1,781.37. The Nasdaq Composite Index was down 10.28 points, or 0.26%, at 3,921.27.

Stock markets are likely to rebound and open higher on Friday, amid firm global cues, after sharp losses in the previous two sessions. Nifty ended the previous trading session with a decline of 2.02% or 123.85 points at 5999.05. On Thursday's trading session, FII sold net Rs.59.8 Cr in cash market. Whereas, DII sold net Rs.850.66 Cr in cash segment.

Coming to today's trade Indian markets are likely to trade in a range with a positive bias on Friday. The key support level for the index is placed at 5,972 levels. The Nifty is expected to trend down till 5925 in the next couple of days. In this period the key support will be at 5972-5925 levels and resistance will be at 6112.

Global News

❖European Central Bank Executive Board member Joerg Asmussen said he has reservations about lowering the deposit rate below zero. (Bloomberg)

❖Euro-area manufacturing expanded for a fifth month in November, as Germany continued to drive the 17-nation currency bloc's gradual recovery from a record-long recession. (Bloomberg)

❖Applications for unemployment benefits in the U.S. declined to the lowest level in almost two months, showing further healing in the labor market. (Bloomberg)

❖Wholesale prices in the U.S. fell in October for a second month, reflecting cheaper energy costs. (Bloomberg)

❖Machinist Michael Pargeter reached for a reference to a TV cartoon set in the Stone Age to explain why union members were spurning a contract offer from Boeing Co. (BA). (Bloomberg)

Economic News

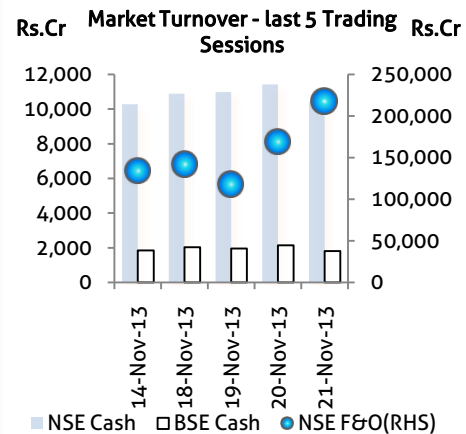
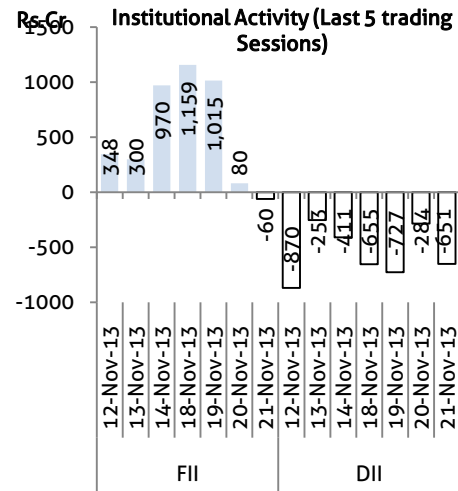
- ❖ Pushing forward the new companies law, the government issued the final set of draft rules, relating to winding up of firms and cost audit. (BS)
- ❖ Amid continuing crisis in the UP sugar industry, the Centre said it is working on a financial package for the cash-starved mills and asked states to implement the Rangarajan panel's recommendation of linking cane rates with sugar price. (BS)
- ❖ Coming down heavily on firms sitting idle on mines, the Coal Ministry has decided to deallocate 11 blocks given to companies including Jindal Steel and Power Ltd (JSPL) and Rathi Udyog Ltd. (BS)
- ❖ The Food Ministry is in the process of finalising a bailout package worth Rs 3,000-3,500 crore for the sugar industry as a whole. (BS)
- ❖ India's oil consumption rose by close to 1% in October, after falling for four consecutive months. (BS)
- ❖ Narrowing current account deficit will not be enough to shield India from pressures tied to Fed tapering, said Fitch Ratings. (BS)
- ❖ Volatility and speculation have been largely contained in the currency market and it is reflecting the true value of the rupee, Finance Minister P Chidambaram said. (BS)
- ❖ Buoyed by strong response to its attempt to sell wheat from state-run warehouses, the government is planning to open a series of such export tenders in the months of January, February and March to sell a total of around 2 million tonnes of wheat in the overseas market. (BS)
- ❖ Finance Minister P Chidambaram expressed the hope that rate of price rise will ease to below 5 per cent following steps taken by the government and the Reserve Bank of India. (BS)
- ❖ The Ministry of Road Transport and Highways may again fall short of achieving its target of awarding projects for constructing 9,000 km of highways this financial year. (BS)
- ❖ Seeking investment in infrastructure and capital markets, Finance Minister P Chidambaram emphasised that India is a safe destination with a potential of 8% growth and providing comparable returns. (BS)
- ❖ In an effort to push the next round of NELP, petroleum minister M Veerappa Moily would conduct an investor meet in Mumbai on November 25. (BS)

Domestic News

- ❖ Facing deficit of iron ore to run its Vijaynagar plant at full-capacity, JSW Steel hinted that it may take part in the e-auctioning of iron ore already mined in Goa. (BS)
- ❖ Indian Oil Corporation has indicated to the West Bengal government that it wants the entire 40% stake in Haldia Petrochemicals at one go, a development which may delay the state government's stake sale in the troubled firm. (BS)
- ❖ Dabur India said it had bought the business undertakings of Northern Aromatics Limited at the Uttarakhand factory. Northern Aromatics is a third-party manufacturer of Dabur. (BS)
- ❖ Private power firm Tata Power said it is looking for a local partner in Vietnam for the proposed 1,320 MW project in the Southeast Asian country. (BS)

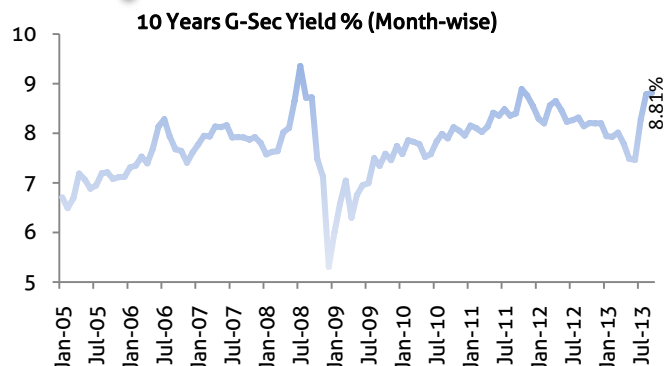
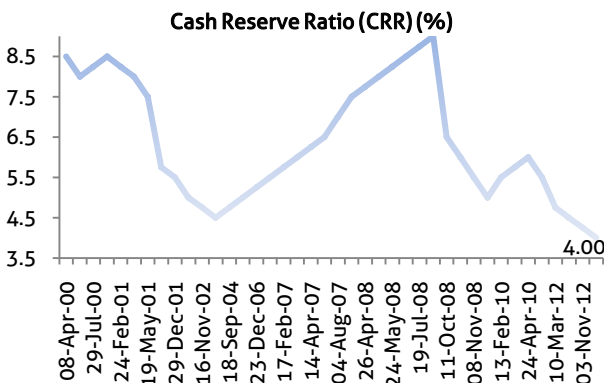
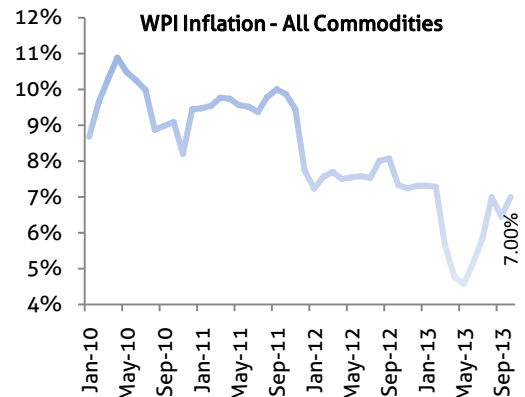
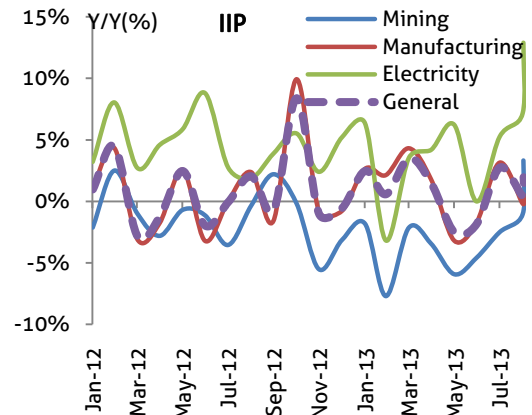
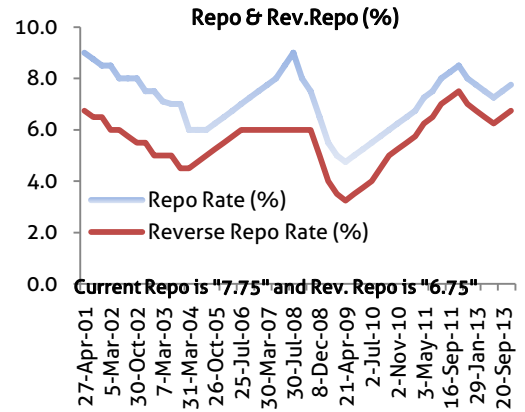
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3472	(0.0010)	(0.07)
GBP-USD	1.6181	(0.0012)	(0.07)
USD-JPY	101.20	0.06	0.06

Bond Markets	Closing	Chg
10-yr bond	9.06	2.0 bps
Interbank call	8.68	-2.0 bps



Domestic News (Cont...)

- ❖ Sesa Sterlite has fixed November 21 as the record date for paying interest on debentures, aggregating to Rs 500 crore, issued in December last year. (BS)
- ❖ The Rs 60,000 crore Shriram Group's retail-financing NBFC Shriram City Union Finance Ltd is planning to come out with a public issue of Non-convertible Debentures (NCDs) on November 25. (BS)
- ❖ Kirloskar Oil Engines is all set to invest Rs 100 crore in capacity building and technology as it eyes to become an end-to-end products provider and looks at entering new geographies over the next two years, said senior officials. (BS)
- ❖ Ahmedabad-based Cadila Pharmaceuticals Limited, a privately held pharma company, has launched the Mycidac-C, an affordable, unique and innovative drug for the treatment of lung cancer. The drug will be available in the Indian market by December 2013. (BS)
- ❖ Jai Corp Ltd, which has interests in developing special economic zones and infrastructure, said one of its promoters, Laxmi Jain, has raised stake in the firm by 3.5% for Rs 36.64 crore. (BS)
- ❖ GSM industry body COAI has asked the Department of Telecom(DoT) not to give "exclusive" number series to Reliance JioInfocomm and allocate only 10 lakh numbers in each circle as per the guidelines. (BS)
- ❖ Pharma firm Cipla Ltd said it has gained majority stake in Uganda-based Quality Chemical Industries Ltd with the acquisition of additional 14.5% stake for \$15 million. (BS)
- ❖ The power ministry has said that four states have so far restructured their short-term liabilities of around Rs 43,000 crore as part of the centre's Financial restructuring Package (FRP) for ailing power distribution companies. (BS)
- ❖ A vessel owned by Essar Shipping carrying iron ore bound for China was arrested in Singapore on Sunday due to a dispute with a bunker fuel supplier, according to sources and the city-state's Supreme Court website. (BS)
- ❖ IRB Infrastructure's traffic growth for the quarter has been slower mainly because its state highway road projects showed de-growth for the second quarter, as compared to last year. (BS)
- ❖ State oil group Petrovietnam and the overseas unit of state explorer Oil and Natural Gas Corp have signed a memorandum on joint exploration of crude oil, the Vietnam News Agency reported on Thursday. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
21-Nov-13	Kirloskar Oil Eng Ltd	KIRLOS KAR INDUSTARIES LIMITED	BUY	1219512	163.46
21-Nov-13	Kirloskar Oil Eng Ltd	AMANSA HOLDINGS PRIVATE LIMITED	SELL	1358635	163.5

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
21-Nov-13	Picturehouse Media	SOUTHFIELD ENERGY PROJECTS PRIVATE LIMITED	P	3,499,650	33
21-Nov-13	Kirloskar Oil Engines	AMANSA HOLDINGS PRIVATE LIMITED	S	2,339,995	163.5
21-Nov-13	Uttam Galva	ERISKA INVESTMENT FUND LTD	P	2,100,000	68.5
21-Nov-13	Bronze Infra	SHERWOOD SECURITIES PVT LTD	S	256,000	12.3
21-Nov-13	GEE	VINOCHAN ADVISORY SERVICES LLP	S	250,000	16.8

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
523477	Gujarat Gas	22-Nov-13	Interim Dividend - Rs.9.00	25-Nov-13
531780	Kaiser Press	22-Nov-13	Stock Split from Rs.10/- to Re.1/-	25-Nov-13
530517	Relaxo Foot-\$	22-Nov-13	Stock Split from Rs. 5/- to Re.1/-	25-Nov-13
504335	Rutron Intl	22-Nov-13	Stock Split from Rs.10/- to Re.1/-	25-Nov-13
502820	DCM	25-Nov-13	Interim Dividend - Rs.1.50	26-Nov-13
531213	Manappuram Finance	25-Nov-13	Interim Dividend - Rs.0.45	26-Nov-13
500102	Ballarpur Inds	26-Nov-13	Dividend - Rs.0.30	-
534804	Care	26-Nov-13	2nd Interim Dividend - Rs.6.00	27-Nov-13
532440	MPS	26-Nov-13	Interim Dividend - Rs.5.00	27-Nov-13
524598	Aksharchem-\$	27-Nov-13	Interim Dividend - Rs.2.50	28-Nov-13
500339	RAIN	27-Nov-13	Interim Dividend - Rs.1.00	28-Nov-13
534707	Anshus Clothing	28-Nov-13	BONUS 1:1	29-Nov-13
505714	Gabriel India-\$	28-Nov-13	Interim Dividend - Rs.0.35	29-Nov-13
533482	Readymade Steel	28-Nov-13	1st Interim Dividend - Rs.0.50	29-Nov-13
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
517385	SYMPHONY	05-Dec-13	Dividend - Rs.6.50	-
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.-	10-Dec-13

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
18-Nov-13	USD	TIC Net Long-Term Transactions			-8.9B
19-Nov-13	CNY	Chinese FDI			6.20%
19-Nov-13	USD	Employment Cost Index (QoQ)		0.50%	0.50%
20-Nov-13	JPY	Trade Balance		-814B	-932B
20-Nov-13	USD	CPI (MoM)		0.10%	0.20%
20-Nov-13	USD	Real Earnings (MoM)		0.10%	-0.10%
20-Nov-13	USD	Retail Sales (MoM)		0.10%	-0.10%
20-Nov-13	USD	Business Inventories (MoM)		0.30%	0.30%
20-Nov-13	USD	Existing Home Sales		5.15M	5.29M
21-Nov-13	JPY	BOJ Target Rate			
21-Nov-13	CNY	Chinese HSBC Manufacturing PMI			50.9
21-Nov-13	EUR	Manufacturing PMI		51.5	51.3
21-Nov-13	EUR	Services PMI		51.9	51.6
21-Nov-13	GBP	CBI Industrial Trends Orders			-4
21-Nov-13	USD	Initial Jobless Claims		335K	339K
21-Nov-13	USD	PPI (MoM)		-0.20%	-0.10%
21-Nov-13	USD	Manufacturing PMI		52.4	51.8
21-Nov-13	EUR	Consumer Confidence		-14	-14.5
21-Nov-13	USD	Philadelphia Fed Manufacturing Index		15.5	19.8
22-Nov-13	USD	KC Fed Manufacturing			6

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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