

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7857	0.18	CNX IT	11119	0.78
Sensex	25868	0.10	BANK NIFTY	17056	(0.10)
DowJones	17824	0.52	S&P CNX 500	6616	0.32
Nasdaq	5105	0.62	CNX FMCG	20450	(0.93)
Hangseng	22685	(0.31)	CNX REALTY	3048	0.78
Shanghai	3633	0.07	CNX AUTO	8339	0.53
Nikkei	19880	0.10	CNX ENERGY	8126	1.20
Strait Times	2917	(0.04)	CNX PHARMA	3511	0.55
Kospi	2005	0.77	Advances / Declines	BSE	NSE
Taiwan	8460	(0.07)	Advances	1464	879
FTSE	6335	0.07	Declines	1190	624
CAC	4911	(0.08)	Unchanged	230	79
DAX	11120	0.31	Total	2884	1582

Nifty Gainers		
Company	Price(Rs)	Chg(%)
GAIL	348.40	9.59
WIPRO	569.70	2.33
BANKBARODA	171.95	2.29
AMBUJACEM	202.40	2.20
DRREDDY	3350.10	2.10

Nifty Losers		
Company	Price(Rs)	Chg(%)
ITC	344.10	(2.26)
SUNPHARMA	726.10	(2.21)
HINDALCO	77.35	(1.34)
HCLTECH	863.25	(1.22)
BOSCHLTD	19010.00	(0.99)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
PNCINFRA	2.59	0.3	8
BLUESTARCO	1.79	0.2	8
GUJGAS	2.14	0.4	5
GAIL	8.79	1.9	5
KEI	5.70	1.3	4

Indian Forex	Closing	Chg	% Chg
USD/INR	66.094	(0.017)	(0.02)
GBP/INR	101.038	0.008	0.01
EUR/INR	70.859	0.081	0.12
JPY/INR	53.820	0.200	0.37

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	25404	255
Silver (Rs/1kg)	34000	305

Commodities	Price	% Chg.
Crude (US\$/BBL)	41.1	1.23
Brent (US\$/BBL)	44.1	(0.43)
Gold (US/oz)	1069.7	(1.20)
Silver (US\$/oz)	14.0	(2.03)
Copper (US\$/MT)	4690.0	1.74
Alum (US\$/MT)	1475.0	2.01
Zinc(US\$/MT)	1577.5	6.09

ADR	Cl. Values	% Chg.
ICICI Bank	8.08	0.01
HDFC Bank	58.82	0.72
Infosys	16.21	(0.08)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	50.81	0.30
Wipro	11.94	(0.02)
Tata Motors	30.48	(0.24)

Market Sensor

US market closed higher Friday, helped by gains in retail stocks, as investors looked to central banker comments on the trajectory of monetary policy. Dow Jones Industrial Average was up 0.51% or 91.06 points at 17823.8. Nasdaq Composite was up 0.62% or 31.28 points at 5104.92. Standard & Poor's 500 was up 0.38% or 7.93 points at 2089.17

Indian equity market Nifty managed to end slightly on the positive side on Friday. It opened almost on flat note but gained momentum as the session progressed. The buying interest was in the response to the Seventh Pay Commission's recommendations of 23.5 per cent overall hike, which will boost consumption in the economy going forward. Nifty ended the previous day with a gain of 0.18% or 13.805 points at 7856.55. On Friday's trading session, FII's sold net Rs.94.09 Cr in cash market and bought net Rs.900.46 in derivative segment. Whereas, DII bought net Rs.610.16 Cr in cash segment.

Global News

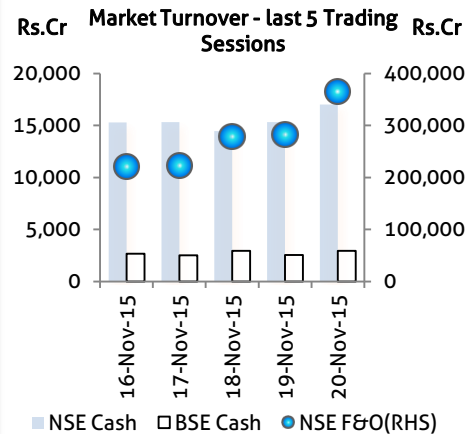
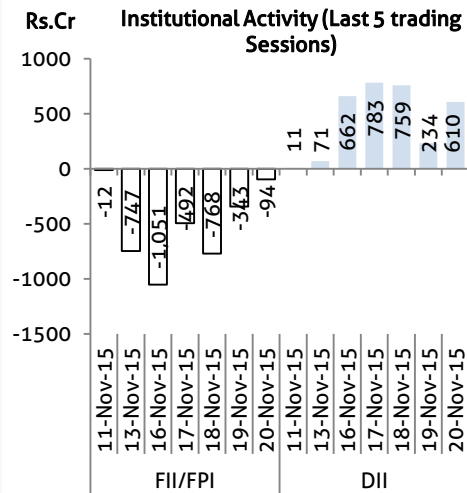
- ❖ The United States pushed China for greater market access at annual trade talks in China on Sunday, though few breakthroughs are expected amid tensions over cyber hacking and rules that could hamper foreign tech firms. (Reuters)
- ❖ China is offering \$10 billion in infrastructure loans to Southeast Asian countries, a senior foreign ministry official said on Sunday. (Reuters)
- ❖ Federal Reserve officials on Wednesday continued to flag December as a likely time for interest rates to rise after seven years near zero, with two expressing confidence they will be able to pull off a rate hike smoothly despite fears of an abrupt market reaction. (Reuters)
- ❖ The number of Americans filing for unemployment benefits fell last week, pointing to a fairly robust labor market. (CNBC)
- ❖ A top Federal Reserve official hinted Thursday that "some major central banks" could move away from near-zero interest rate policy "in the relatively near future." (CNBC)

Economic News

- ❖ Government's move to provide compensation to developers of highways projects, where delays are not attributable to them, will provide relief to such schemes as projects worth Rs 830 billion are stuck, India Ratings and Research (Ind-Ra) said . (BS)
- ❖ After Indian Prime Minister Narendra Modi's recent visit to Britain, a number of bilateral agreements were signed to strengthen the growing research and innovation partnership between the two countries. (BS)
- ❖ Foodgrain production in Odisha is likely to drop by about 28% due to erratic and scanty rainfall during the 2015 Kharif season. (BS)
- ❖ The implementation of Pay Commission's recommendations, which will increase the annual burden on the exchequer by Rs 1.02 lakh crore, will make it more difficult for the government to stick to the fiscal consolidation roadmap, Standard & Poor's said . (BS)
- ❖ Joining ranks against the 7th Pay Commission recommendations, national trade unions linked to BJP and the Left said the proposed hike was lowest in many decades and were not in sync with inflation. (BS)
- ❖ The 7th Pay Commission report has recommended Child Care Leave (CCL) for single male parent, which is currently given to only women employees. (BS)
- ❖ The mines ministry has written to the finance ministry to propose scrapping a 5% export duty on iron ore pellets, Mines Secretary Balvinder Kumar told Reuters, adding the government could also look at abolishing duty on low-grade iron ore. (BS)
- ❖ A high-powered panel has cleared as many as 32 proposals for setting up manufacturing units in defence and explosive sectors which includes conditional approval to eight subsidiaries of Reliance Infra. (BS)
- ❖ With Odisha affected by crop loss in over 5.32 lakh hectare of land due to drought and subsequent series of farmer suicides, Odisha government asked the Centre to reduce the interest rates on agricultural loans and extend interest incentive on crop loan. (BS)
- ❖ A day after the Pay Commission proposed 23.55% rise in salaries and pensions of central government employees, the Finance Ministry expressed confidence that the fiscal deficit targets will not be breached because of absorbing the Rs 1.02 lakh crore bill. (BS)
- ❖ RSS affiliate Bharatiya Mazdoor Sangh "strongly" opposed recommendations of the 7th Pay Commission saying the increase in net income is only 16% as against the projected 23.55% hike. (BS)
- ❖ State finance ministers called on Friday for a proposed Goods and Services Tax (GST) to be simplified but did not discuss what rate it should be set at, indicating scant progress on Prime Minister Narendra Modi's priority reform. (BS)
- ❖ The central government's target to bring down fiscal deficit to 3.5 per cent in 2016-17 is likely to become even more challenging, considering the rise in wage expenditure, a Citigroup report says. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.0604	(0.0042)	(0.40)
GBP-USD	1.5162	(0.0027)	(0.17)
USD-JPY	123.23	0.4000	0.33

Bond Markets	Closing	Chg
10-yr bond	7.82	3.50bps
Interbank call	6.73	17.71 bps



Domestic News

- ❖ Country's biggest gas importer Petronet LNG is close to renegotiating a major deal with its Qatari supplier RasGas, lowering the cost of gas shipments and avoiding a \$1.5 billion penalty fee for lifting less gas than agreed, two sources said. (BS)

Domestic News (Cont...)

❖ Malaysia's 1337 Ventures announced it invested in three Philippine start-ups from its pre-accelerator program Alpha Startups, which recently launched in Cebu province. (BS)

❖ US pharma major has completed its \$750 million acquisition of female healthcare business of Famy Care. (BS)

❖ German mechanical and plant engineering firm Dürr has acquired Indian supplier Mhitraa Engineering Equipment based in Chennai. (BS)

❖ App-based taxi aggregator Ola has signed a multi-year licensing deal with MapMyIndia giving it access to more accurate location and mapping data in smaller towns and cities. (BS)

❖ Income tax returns e-filing website ClearTax said it has launched mobile application 'TaxCloud' to make the process of e-filing of returns more easier. (BS)

❖ Bosch India, leading supplier of technology and services, inaugurated its 15th manufacturing facility in India. (BS)

❖ Leading steel producer Mideast Integrated Steel Ltd, flagship company of the \$4 billion Mesco Group, has initiated work on brownfield expansion of its plant at Kalinganagar in Jajpur district. (BS)

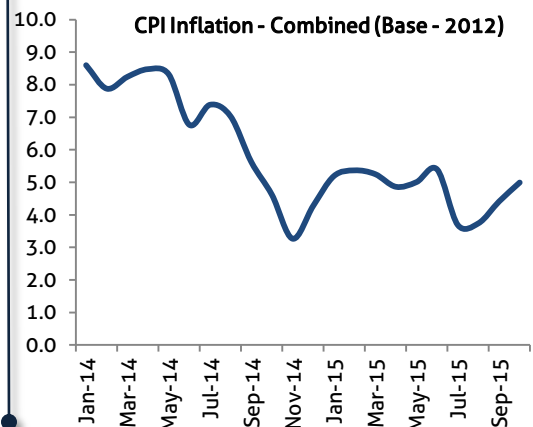
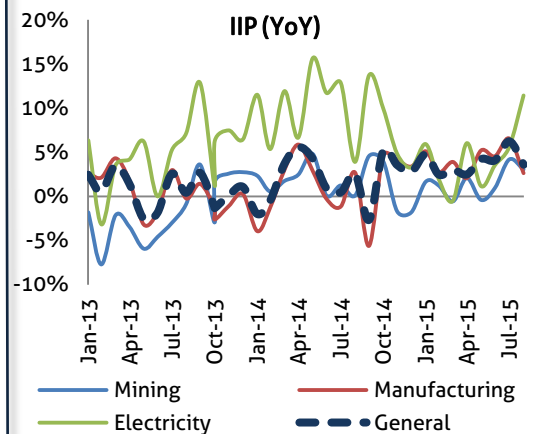
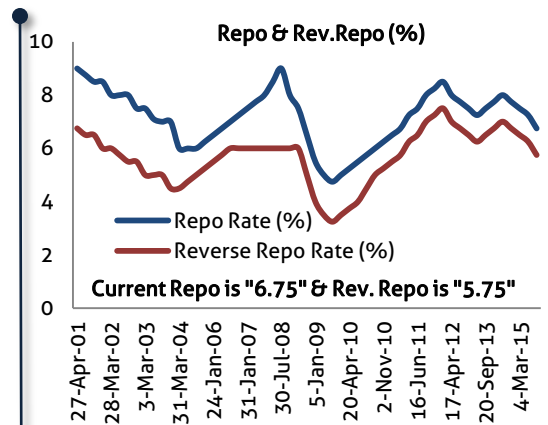
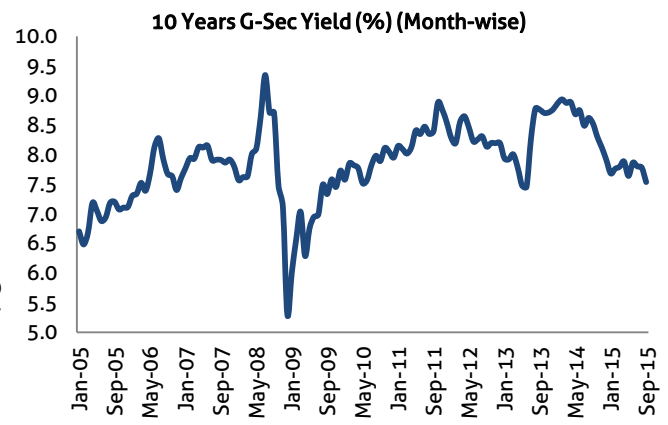
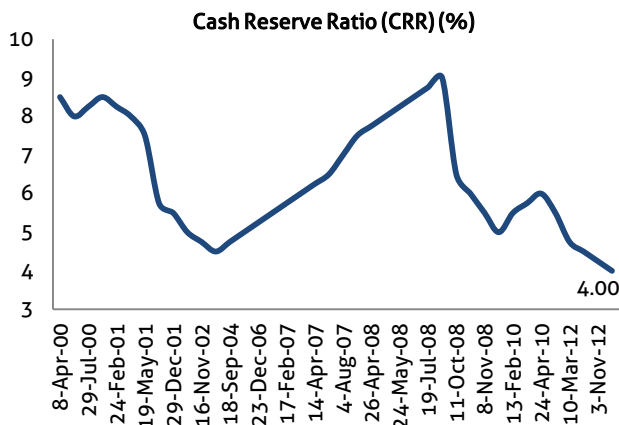
❖ The High Level Clearance Authority (HLCA) of the Odisha government would consider the proposal by National Aluminium Company (Nalco) to expand capacity of its alumina refinery at Damanjodi (in Koraput district) from 2.275 million tonne per annum (mtpa) to 3.275 mtpa. (BS)

❖ Dr Reddy's Laboratories, which is embroiled in a legal battle with AstraZeneca over the usage of purple colour for generic version of Nexium, has filed a complaint in a US court alleging that the latter "knew" about its plans to use the same colour in the capsules. (BS)

❖ Ahmedabad-based Zydus Cadila launched Tenglyn - Teneligliptin 20 mg tablets, which belongs to a new class of oral anti-diabetic agents, Gliptins. (BS)

❖ Industry body Federation of Indian Chambers of Commerce and Industry (FICCI) on Friday named Harshavardhan Neotia, chairman of Ambuja Neotia Group, as its president elect for 2016. (BS)

❖ Bengaluru-based startup Discover Dollar has built a data analytics solution to help retailers discover money that is usually lost in overpayment to vendors. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Nov-15	VAKRANGEE LIMITED	WTCNAM COMMON TRUST FUNDS TRUST EMG MKTS OPPTS PORTFOLIO	BUY	8776247	147.0
20-Nov-15	Lovable Lingerie Ltd	NALANDA INDIA EQUITY FUND LIMITED	SELL	150161	233.6
20-Nov-15	Sunil Hitech Engr Ltd	ASIT C MEHTA INVESTMENT INTERMEDIATES LTD.	SELL	110789	301.9
20-Nov-15	Subex Limited	JMP SECURITIES PVT LTD	BUY	2752746	12.0
20-Nov-15	B. L. Kashyap and Sons Li	L AND T INFRASTRUCTURE FINANCE COMPANY LIMITED	SELL	1201878	11.9

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Nov-15	ADIFINCHM	UTKARSH BHIKHOOBHAI SHAH	B	1,021,594	215.5
20-Nov-15	BHANDHOS	ARCADIA SHARE & STOCK BROKERS PVT. LTD	S	85,000	50.0
20-Nov-15	INNOVTEC	ARUN SOOD	S	122,500	32.1
20-Nov-15	PMCFIN	VIPUL VIRENDRAKUMAR PATEL	S	4,743,000	0.8
20-Nov-15	VGCL	SANTOSH BHANSALI HUF	S	120,000	22.6

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
531357	MERMETL	23-Nov-15	Reduction of Capital	24-Nov-15
532344	SOFTSOL	23-Nov-15	Interim Dividend - Rs. - 1.2000	25-Nov-15
532890	TAKE	23-Nov-15	Interim Dividend - Rs. - 0.3000	25-Nov-15
533345	IPRU1063	24-Nov-15	Temporary Suspension	26-Nov-15
533347	IPRU1064P	24-Nov-15	Dividend On Mutual Fund	26-Nov-15
533347	IPRU1064P	24-Nov-15	Temporary Suspension	26-Nov-15
533349	IPRU1302	24-Nov-15	Temporary Suspension	26-Nov-15
533351	IPRU1303P	24-Nov-15	Dividend On Mutual Fund	26-Nov-15
533351	IPRU1303P	24-Nov-15	Temporary Suspension	26-Nov-15
533348	IPRU1686	24-Nov-15	Dividend On Mutual Fund	26-Nov-15
533348	IPRU1686	24-Nov-15	Temporary Suspension	26-Nov-15
533352	IPRU1687	24-Nov-15	Dividend On Mutual Fund	26-Nov-15
533352	IPRU1687	24-Nov-15	Temporary Suspension	26-Nov-15
536061	IPRU8061	24-Nov-15	Temporary Suspension	26-Nov-15
536062	IPRU8062	24-Nov-15	Dividend On Mutual Fund	26-Nov-15
536062	IPRU8062	24-Nov-15	Temporary Suspension	26-Nov-15
536063	IPRU8116	24-Nov-15	Dividend On Mutual Fund	26-Nov-15
536063	IPRU8116	24-Nov-15	Temporary Suspension	26-Nov-15
531213	MANAPPURAM	24-Nov-15	Interim Dividend - Rs. - 0.4500	26-Nov-15
507446	SIMBHSUGAR	24-Nov-15	Amalgamation	26-Nov-15
531717	VIDHIDYE	24-Nov-15	Interim Dividend - Rs. - 0.2000	26-Nov-15
502015	ASSOSTN-B	26-Nov-15	Stock Split From Rs.5/- to Rs.1/-	27-Nov-15

Global Economic Calendar

Date	Curr.	Event	Forecast	Previous
23-Nov-15	JPY	Manufacturing PMI (Nov)		52.4
23-Nov-15	EUR	Manufacturing PMI (Nov)	52.3	52.3
23-Nov-15	EUR	Services PMI (Nov)	54.1	54.1
23-Nov-15	USD	Chicago Fed National Activity (Oct)		-0.37
23-Nov-15	USD	Manufacturing PMI (Nov)	53.9	54.1
23-Nov-15	USD	Existing Home Sales (Oct)	5.40M	5.55M
24-Nov-15	USD	GDP (QoQ) (Q3)	2.00%	1.50%
24-Nov-15	USD	S&P/CS HPI Composite - 20 n.s.a. (YoY) (Sep)	5.20%	5.10%
24-Nov-15	USD	CB Consumer Confidence (Nov)	99.5	97.6
25-Nov-15	USD	MBA 30-Year Mortgage Rate		4.18%
25-Nov-15	USD	Continuing Jobless Claims		2,175K
25-Nov-15	USD	Core PCE Price Index (MoM) (Oct)	0.20%	0.10%
25-Nov-15	USD	Durable Goods Orders (MoM) (Oct)	1.50%	-1.20%
25-Nov-15	USD	Initial Jobless Claims		271K
25-Nov-15	USD	Personal Spending (MoM) (Oct)	0.30%	0.10%
25-Nov-15	USD	Services PMI (Nov)	55	54.8
25-Nov-15	USD	Michigan Consumer Expectations (Nov)	85.7	85.6
25-Nov-15	USD	New Home Sales (Oct)	500K	468K
27-Nov-15	JPY	Household Spending (YoY) (Oct)	0.10%	-0.40%
27-Nov-15	JPY	National CPI (YoY) (Oct)		
27-Nov-15	JPY	Tokyo CPI (YoY) (Nov)		0.10%
27-Nov-15	JPY	Unemployment Rate (Oct)	3.40%	3.40%
27-Nov-15	GBP	GfK Consumer Confidence (Nov)	3	2
27-Nov-15	GBP	Business Investment (YoY) (Q3)		3.10%
27-Nov-15	GBP	GDP (YoY) (Q3)	2.30%	2.30%
27-Nov-15	EUR	Business Climate (Nov)	0.4	0.4
27-Nov-15	EUR	Consumer Confidence (Nov)	-8	-7.7

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
25-Nov-15	INR	M3 Money Supply (2wk)			
27-Nov-15	INR	Bank Loan Growth (2wk)			9.00%
27-Nov-15	INR	Deposit Growth (2wk)			11.10%

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