

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8530	0.62	CNX IT	11810	1.84
Sensex	28500	0.58	BANK NIFTY	18282	1.25
DowJones	17818	0.04	S&P CNX 500	6881	0.49
Nasdaq	4755	0.89	CNX FMCG	20289	(0.08)
Hangseng	23897	0.02	CNX REALTY	4101	0.95
Shanghai	2544	0.43	CNX AUTO	8394	0.18
Nikkei	17421	0.37	CNX ENERGY	9421	(0.69)
Strait Times	3335	(0.17)	CNX PHARMA	11138	(0.46)
Kospi	1975	(0.20)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9119	(0.03)	Advances	1325	698
FTSE	6730	(0.31)	Declines	1752	835
CAC	4368	0.49	Unchanged	116	67
DAX	9786	0.54	Total	3193	1600

Nifty Gainers		
Company	Price(Rs)	Chg(%)
DLF	148.25	5.59
JINDALSTEL	149.30	4.44
TATAPOWER	91.90	4.31
INFY	4276.00	3.13
TATASTEEL	476.90	3.02

Nifty Losers		
Company	Price(Rs)	Chg(%)
POWERGRID	142.95	(2.46)
CIPLA	617.05	(1.59)
RELIANCE	983.80	(1.39)
ACC	1451.50	(0.92)
SUNPHARMA	834.00	(0.83)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
OSCAR	8.01	0.0	2526
CONCOR	3.32	0.1	32
VINATORGA	1.90	0.1	28
HTMEDIA	8.67	0.3	28
COROMANDEL	3.79	0.1	28

Indian Forex	Closing	Chg	% Chg
USD/INR	61.780	(0.071)	(0.11)
GBP/INR	96.784	(0.228)	(0.24)
EUR/INR	76.595	(1.028)	(1.32)
JPY/INR	52.410	(0.120)	(0.23)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26470	94
Silver (Rs/1kg)	36140	370

Commodities	Price	% Chg.
Crude (US\$/BBL)	75.8	(0.94)
Brent (US\$/BBL)	79.6	(1.04)
Gold (US/oz)	1198.9	(0.20)
Silver (US\$/oz)	16.6	0.61
Copper (US\$/MT)	6731.0	(0.87)
Alum (US\$/MT)	2060.0	(0.84)
Zinc (US\$/MT)	2300.0	0.04

ADR	Cl. Values	% Chg.
ICICI Bank	60.09	0.10
HDFC Bank	54.29	0.69
Infosys	69.66	1.81
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	57.10	(0.46)
Wipro	12.68	0.16
Tata Motors	46.47	(1.07)

## Market Sensor

US market rose on Monday, with retailers including Urban Outfitters gaining as investors bet lower gasoline prices will translate into increased sales as consumers shop for holiday gifts. Dow Jones Industrial Average was up 0.04% or 7.84 points at 17817.90. Nasdaq Composite was up 0.89% or 41.92 points at 4754.89. Standard & Poor's 500 was up 0.29% or 5.91 points at 2069.41.

Indian equity market created new high on the first day of winter parliamentary session. Sentiment remained positive as china's government decreased lending rate by 40bps to 5.6% further expectations are high of RBI to walk the similar path of rate cut and government will might pass the GST and 'FDI in Insurance' Bill in the Parliament. Nifty ended the previous trading session with a gain of 0.62% or 52.80 points at 8530.15. On Monday's trading session, FIIs bought net Rs.407.42 Cr in cash market and sold net Rs.147.79 in derivative segment. Whereas, DII sold net Rs.162.78 Cr in cash segment.

**Coming to today's trade Nifty might remain volatile with positive bias, crucial intraday support seen at 8570 followed by 8630 while resistance exist at 8460 and then at 8420.**

## Global News

❖ One week after the European Central Bank president vowed to revive inflation "as fast as possible," policy makers will receive a glimpse on just how feeble cost pressures are now. Economists forecast euro area data on Nov. 28 will show price growth matching the weakest since 2009, which would add to the drumroll for a stimulus debate at the ECB's Dec. 4 meeting. (Bloomberg)

❖ Purchasing government debt comes with legal obstacles and it is no panacea for the euro-area economy, European Central Bank Governing Council member Jens Weidmann said. (Bloomberg)

❖ Russia stands to lose as much as \$140 billion a year as a result of lower oil prices and U.S. and European sanctions, Finance Minister Anton Siluanov said, underlining the risks of a prolonged stalemate over Ukraine. (Bloomberg)

❖ In Shinzo Abe's Japan, corporate profits and the stock market are surging while household income shrinks with the economy. Investors are acting like they expect the divergence to grow. (Bloomberg)

## Economic News

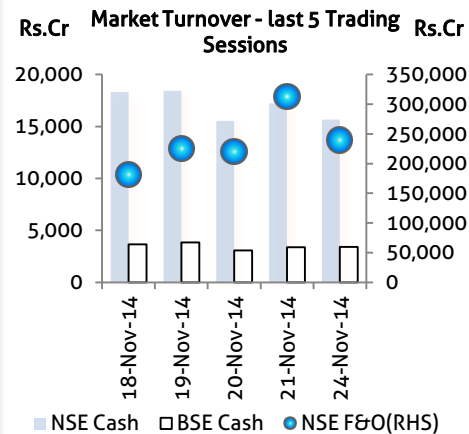
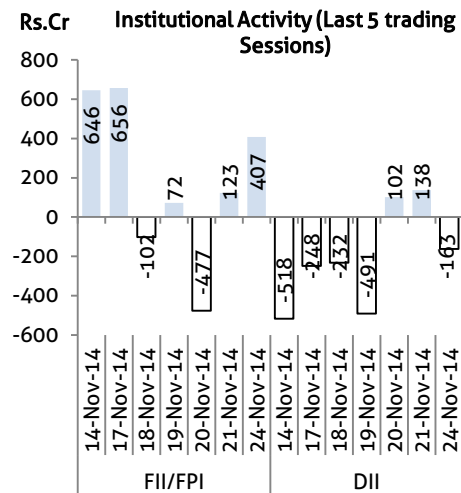
- ❖ The state-run Mumbai Metro Rail Corporation (MMRC) will invite bids for the construction of the 32.5 km-long, Rs 23,136-crore Mumbai Metro Phase-III project this week. (BS)
- ❖ Prime Minister Narendra Modi continues to climb the popularity charts among the aam janta (and NRIs!) six months after he won a historic election. But hear economists, financial analysts and other better informed watchers of the Indian economy speak and you know that his honeymoon period is fast coming to an end. Modi's first 6 months in office have received at best, mixed reviews, with critics complaining that while the PM's grand social campaigns and masterful foreign policy. (BS) maneuvers have far exceeded expectations, he hasn't quite pushed the buttons on big bang market friendly reforms to revive India's ailing economy. (BS)
- ❖ To increase awareness and deepen insurance penetration, Government should launch a 'Jan Bima Yojna' on the lines of a similar programme launched for banking, Insurance Regulatory and Development Authority (Irda) Chairman T S Vijayan said today. (BS)
- ❖ The Bombay High Court has come out with two landmark judgment against the tax authorities in the last two months on two transfer pricing cases against Vodafone and Shell. The rulings are landmark because it has axed an "absurd" demand by the Indian tax authorities. In no other country infusion of share capital is treated as a transaction on which tax can be raised. Foreign companies and their tax advisory firms have cried foul for a long time, which vitiated the business environment in the country. While doing business in India may not become easier after this ruling, tax specialists and law firms believe, the ruling gives the government an opportunity to show its commitment to improving business conditions in India by accepting the Bombay High Court's ruling. (BS)
- ❖ The United States wants to step up its trade dialogue with India, Trade Representative Michael Froman said on Monday, after the resolution of a global trade dispute paved the way for President Barack Obama to visit India. (BS)
- ❖ State-owned SAIL has urged the Coal Ministry to allocate mines under "government dispensation" route, saying it would help the steel PSU augment its production capacity. (BS)

## Domestic News

- ❖ Tamil Nadu Newsprint and Papers, the Tamil Nadu government-owned company, has launched a new variety of paper under the brand name 'GreenPal'. (BS)
- ❖ VA Tech WABAG today informed the BSE that it has bagged an order from Maynilad Water Services, Philippines for construction of 20 MLD Sewage Treatment Plant (STP) at Tunasan. (BS)
- ❖ Multi Commodities Exchange, India's largest commodities exchange by volumes, has invited fresh applications for the post of Managing Director, which has been lying vacant since Manoj Vaish left the organisation in May. (BS)
- ❖ Essar Oil Ltd today announced the appointment of Manish Maheshwari as Chief Executive Officer of its oil and gas Exploration and Production (E&P) business. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.2424	(0.0018)	(0.14)
GBP-USD	1.5683	(0.0023)	(0.15)
USD-JPY	118.11	(0.16)	(0.14)

Bond Markets	Closing	Chg
10-yr bond	8.20	-2.7 bps
Interbank call	8.01	19.77 bps



## Domestic News (Cont...)

❖ Dr Reddy's Laboratories has launched Docetaxel injection USP 20 mg/mL and 80 mg/4 mL, a generic version of Taxotere (docetaxel injection) in the US market. (BS)

❖ Leading e-commerce player Flipkart has been aggressively hiring top-level talent for the past several months. With around nine senior vice presidents and 14 vice presidents in place now, the Bengaluru-based company appears may have built a strong foundation to tackle the rapid growth in the sector, but it wants to do more. (BS)

❖ Jindal Steel and Power Ltd has shelved a \$10 billion coal-to-diesel project, its chairman told Reuters, becoming the first big casualty of a Supreme Court decision to scrap coalfields allocated to private firms since 1993. (BS)

❖ Striking another major deal in less than four months, Adani Power today entered into a binding agreement with Gautam Thapar-led Avantha Group to buy out its 600 MW Korba West unit for more than Rs 4,200 crore. (BS)

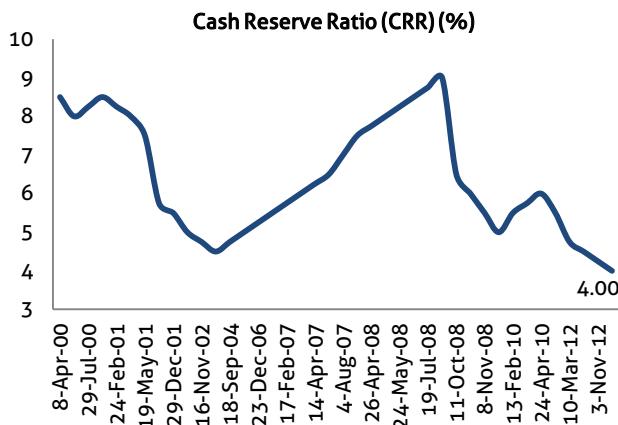
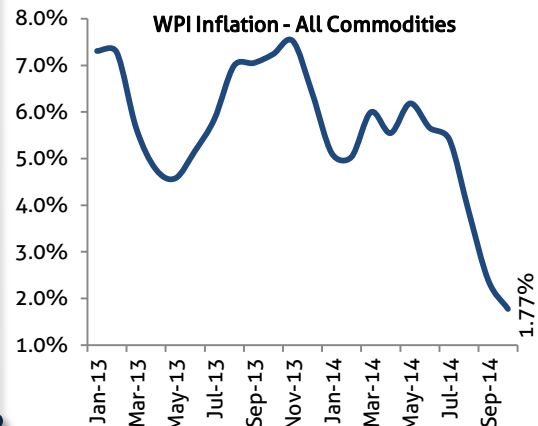
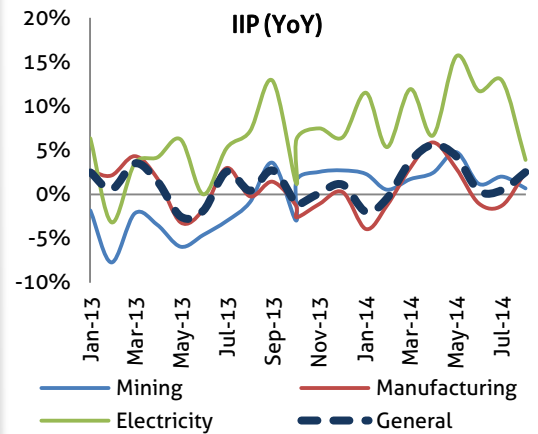
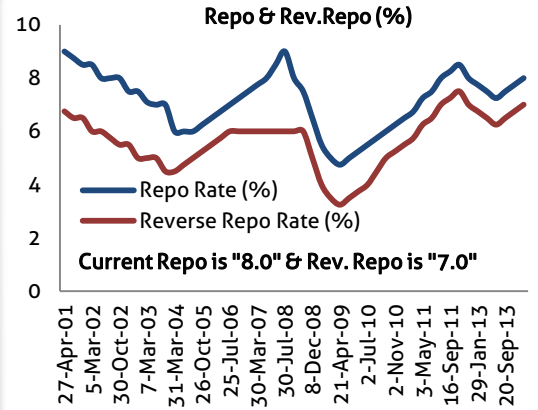
❖ German sportswear major Adidas has appointed Tushar Goculdas as Brand Director-Adidas, Emerging Markets, with effect from March 1, 2015. (BS)

❖ India's leading agri biotech company Maharashtra Hybrid Seeds Company (Mahyco) has acquired 60% stake in Quton Seed Company (Pvt) Ltd, Harare (Zimbabwe) based Africa's largest cotton seed producer at an undisclosed sum. (BS)

❖ SpiceJet Ltd is in "exploratory and preliminary stage" talks with investors about raising fresh capital, the budget airline said in a regulatory statement on Monday. (BS)

❖ Gautam Thapar-led Avantha group's plans to sell 1200 MW of commissioned and under construction power plant in Chhatisgarh to the Adani group and sell stake in the proposed consumer products subsidiary of Crompton Greaves will help the group parent to release pledges in Crompton Greaves and raise cash for business expansion, analysts have said. The consumer products business which is sought to be demerged is valued at about Rs 5500-6000 crore. (BS)

❖ Tata Motors, grappling with falling car sales for a third year in a row, is planning to put a thrust on rural market among other revival measures. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
24-Nov-14	JK Tyre & Industries Ltd	MERRILL LYNCH CAPITAL MARKETS ESPANA S.A. SVB	BUY	207841	536.2
24-Nov-14	Ponni Sugars (Erode) Limi	ORANGE MAURITIUS INVESTMENTS LIMITED	BUY	345000	156.5
24-Nov-14	Burnpur Cement Limited	YMD FINANCIAL CONSULTANCY PRIVATE LIMITED	BUY	634806	10.1
24-Nov-14	Vikas GlobalOne Ltd	DAYA GOYAL	SELL	563500	6.8
24-Nov-14	Sanco Industries Ltd.	SATYABHAMA DEVI	BUY	56000	17.0

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
24-Nov-14	TVTODAY	RELIANCE CAPITAL LTD	S	1,505,000	196.1
24-Nov-14	OSCAR	RHC HOLDING PRIVATE LIMITED	B	800,000	259.0
24-Nov-14	SIMPLEXINF	GE EQUITY INTERNATIONAL MAURITUS	S	424,045	351.6
24-Nov-14	ADHUNIKIND	VRINDAVAN ADVISORY SERVICES LLP	B	500,000	156.0
24-Nov-14	WINDMACHIN	DILIP GOPIKISAN PIRAMAL	S	1,490,000	29.4

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500210	INGERRAND	25-Nov-14	Interim Dividend - Rs.3.00	26-Nov-14
500271	MAX	25-Nov-14	Interim Dividend - Rs.4.00	26-Nov-14
511116	QUADRANT-\$	25-Nov-14	Reduction of Capital	26-Nov-14
533298	SURANASOL	25-Nov-14	Stock Split from Rs.10/- to Rs.5/-	26-Nov-14
517530	SURANAT&P	25-Nov-14	Stock Split from Rs.5/- to Re.1/-	26-Nov-14
532890	TAKE	25-Nov-14	Interim Dividend - Rs.0.30	26-Nov-14
502820	DCM	26-Nov-14	Interim Dividend - Rs.1.50	27-Nov-14
526797	GREENPLY	26-Nov-14	Spin Off	27-Nov-14
533353	IPRU1073	26-Nov-14	Temporary Suspension	27-Nov-14
533355	IPRU1074P	26-Nov-14	Dividend On Mutual Fund	27-Nov-14
533355	IPRU1074P	26-Nov-14	Temporary Suspension	27-Nov-14
533357	IPRU1304	26-Nov-14	Temporary Suspension	27-Nov-14
533359	IPRU1305P	26-Nov-14	Temporary Suspension	27-Nov-14
533359	IPRU1305P	26-Nov-14	Dividend On Mutual Fund	27-Nov-14
533356	IPRU1688	26-Nov-14	Dividend On Mutual Fund	27-Nov-14
533356	IPRU1688	26-Nov-14	Temporary Suspension	27-Nov-14
533360	IPRU1689	26-Nov-14	Dividend On Mutual Fund	27-Nov-14
533360	IPRU1689	26-Nov-14	Temporary Suspension	27-Nov-14
535031	IPRU8063	26-Nov-14	Temporary Suspension	27-Nov-14
535032	IPRU8064	26-Nov-14	Temporary Suspension	27-Nov-14
535032	IPRU8064	26-Nov-14	Dividend On Mutual Fund	27-Nov-14
535033	IPRU8117	26-Nov-14	Dividend On Mutual Fund	27-Nov-14

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
24-Nov-14	EUR	German Business Expectations (Nov)			98.3
24-Nov-14	USD	Services PMI (Nov)			57.1
25-Nov-14	EUR	German GDP (QoQ) (Q3)			0.001
25-Nov-14	USD	GDP (QoQ) (Q3)			0.035
25-Nov-14	USD	House Price Index (Sep)			214
26-Nov-14	EUR	German Import Price Index (YoY) (Oct)			-0.016
26-Nov-14	GBP	GDP (QoQ) (Q3)			0.007
26-Nov-14	USD	New Home Sales (Oct)			467K
27-Nov-14	EUR	German Unemployment Rate (Nov)			0.067
27-Nov-14	EUR	Consumer Confidence (Nov)			-11.1
27-Nov-14	EUR	Services Sentiment (Nov)			4.4
27-Nov-14	EUR	German CPI (MoM) (Nov)			-0.003
27-Nov-14	JPY	Unemployment Rate (Oct)			0.036
27-Nov-14	JPY	Retail Sales (YoY) (Oct)			0.023
28-Nov-14	JPY	Construction Orders (YoY) (Oct)			-0.403
28-Nov-14	EUR	German Retail Sales (MoM) (Oct)			-0.032
28-Nov-14	EUR	CPI (YoY) (Nov)			0.004
28-Nov-14	EUR	Unemployment Rate (Oct)			0.115

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
26-Nov-14	INR	M3 Money Supply (2wk)			11.30%
28-Nov-14	INR	Bank Loan Growth (2wk)			11.20%
28-Nov-14	INR	GDP Quarterly (YoY) (Q2)			5.7%

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