

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6115	2.00	CNX IT	8784	(0.02)
Sensex	20605	1.92	BANK NIFTY	11083	3.80
DowJones	16073	0.05	S&P CNX 500	4716	1.80
Nasdaq	3995	0.07	CNX FMCG	16764	2.12
Hangseng	23691	0.03	CNX REALTY	172	2.53
Shanghai	2184	(0.10)	CNX AUTO	5176	2.05
Nikkei	15513	(0.68)	CNX ENERGY	7762	1.43
Strait Times	3175	(0.18)	CNX PHARMA	7337	0.60
Kospi	2010	(0.32)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8222	0.42	Advances	1435	771
FTSE	6695	0.30	Declines	1015	389
CAC	4302	0.55	Unchanged	166	63
DAX	9300	0.88	Total	2616	1223

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BHEL	144.60	5.43
ICICIBANK	1073.85	5.22
BPCL	347.45	4.39
KOTAKBANK	746.70	4.20
SBIN	1809.90	4.14

Nifty Losers		
Company	Price(Rs)	Chg(%)
NTPC	149.80	(0.70)
INFY	3331.00	(0.50)
HINDALCO	118.20	(0.17)
LUPIN	850.00	(0.10)
...	...	...

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Mangalore Chem	8.73	0.23	38
Emami-\$	2.07	0.06	33
Hatsun Agro	4.76	0.16	30
Wyeth	4.50	0.30	15
OMDC	0.42	0.03	15

Indian Forex	Closing	Chg	% Chg
USD/INR	62.577	(0.447)	(0.71)
GBP/INR	101.425	(0.617)	(0.60)
EUR/INR	84.700	(0.220)	(0.26)
JPY/INR	61.430	(0.940)	(1.51)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30060	(740)
Silver (Rs/1kg)	44225	(875)

Commodities	Price	% Chg.
Crude (US\$/BBL)	94.4	(0.52)
Brent (US\$/BBL)	110.9	(0.14)
Gold (US/oz)	1252.8	0.66
Silver (US\$/oz)	20.3	1.86
Copper (US\$/MT)	7067.5	0.03
Alum (US\$/MT)	1734.0	(0.74)
Zinc(US\$/MT)	1872.0	(0.03)

ADR	Cl. Values	% Chg.
ICICI Bank	35.34	1.06
HDFC Bank	33.21	0.28
Infosys	53.23	(0.69)
Sterlite Inds.	6.22	0.00
Dr. Diddy's Labs	39.41	0.07
Wipro	11.54	(0.04)
Tata Motors	31.27	1.07

## Market Sensor

US market eked out a small gain after global powers agreed a deal with Iran to curb the nation's nuclear program. Dow Jones Industrial Average was up 0.34% or 54.78 points at 16064.77. Nasdaq Composite was up 0.57% or 22.49 points at 3991.65 Standard & Poor's 500 was up 0.50% or 8.91 points at 1804.76.

Indian market rallied yesterday on the easing global crude oil prices on expectation of reduction in geo-political tension between US and Iran. Nifty ended the previous trading session with a gain of 2.00% or 119.90 points at 6115.35. On Friday's trading session, FIIs bought net Rs.837.8 Cr in cash market and bought net Rs.1300.90 in derivative segment. Whereas, DII sold net Rs.792.43 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile while crucial intraday support seen at 6070 breach of which can witness lower levels of 6000.**

## Global News

❖ Contracts to buy previously owned U.S. homes hit a 10-month low in October, but a strong rebound in services sector activity early this month suggested some resilience in the economy as the year winds down. (Reuters)

❖ Economists trimmed their forecasts for U.S. economic growth in the final quarter of the year and the first three months of 2014 but predicted a slightly higher rate of job growth over the next four quarters. (Reuters)

❖ Members of the Bank of Japan's monetary policy board stated that the country's economic growth will accelerate in the second half of fiscal year 2013, minutes from the board's meeting revealed on Tuesday. (RTT News)

❖ An index measuring corporate service prices in Japan was up 0.8 percent on year in October, the Bank of Japan said on Tuesday, standing at 96.2. (RTT News)

❖ An index measuring consumer sentiment in South Korea came in with a score of 107.0 in November, the Bank of Korea said on Tuesday - up from 106.0 in October. (RTT News)

❖ Treasury's sale of \$32 billion of two-year notes drew above-average demand on speculation that the Federal Reserve's efforts to hold down short-term yields will support the debt. (Bloomberg)

## Economic News

❖The economy may have grown 4.6% in the second quarter of the fiscal driven by higher industrial growth and pick-up in exports, rating agency Icria said .(BS)

❖The Rs 1,100 crore agriculture export promotion scheme will continue in the 12th five-year plan (2012-13 to 2016-17). (BS)

❖The Cabinet deferred the consideration of proposals to relax foreign direct investment norms in the housing sector and to reduce the FDI cap to 49% in critical areas of the pharma segment. (BS)

❖Fitch Ratings said meeting oil subsidies will be a challenge this fiscal and the government may be forced to roll over around Rs 45,000 crore to the next fiscal as the agency expects under-recoveries to be around Rs 65,000 crore this fiscal. (BS)

❖The central government has not thought of any alternate to Kolkata Port Trust, Shipping Secretary V Trivedi said while allaying fears that the government was trying to choke the port by blocking dredging subsidy. (BS)

❖The Coir Board is planning to set up a 10 MW plant here to generate power from coir pith, a first such initiative in the country, with an estimated investment of Rs 50 crore. (BS)

❖The Directorate general of Foreign trade ( DGFT) is mulling an increase in value addition norms for gold jewellery to curb circular trading in gold and increase in fake exports. (BS)

❖Foreign brokerage Bank of America Merrill Lynch (BofA-ML) said it expects the Reserve Bank to hike its repo rate in the next policy to combat inflation, which may ease in the second half next year. (BS)

❖The micro, small and medium sector (MSME) has received a major policy boost through a big relaxation in the benefits accorded to them through the ministry. (BS)

❖The country's coking coal imports could see a double-digit percentage increase this fiscal year as a scarcity of high-quality iron ore after a mining ban is forcing steelmakers to use inferior grades that need more coal to process into steel. (BS)

❖The Cabinet will meet on Monday but is unlikely to take a call on relaxing foreign direct investment (FDI) in real estate and pharmaceuticals as well as India's position in the World Trade Organization (WTO). (BS)

## Domestic News

❖State-owned gas utility GAIL India Ltd plans to set up a CNG Green Corridor between New Delhi and Mumbai in 12-18 months to facilitate vehicle refuelling, company Chairman B C Tripathi said .(BS)

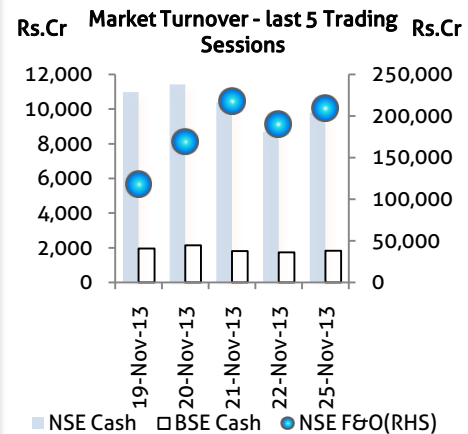
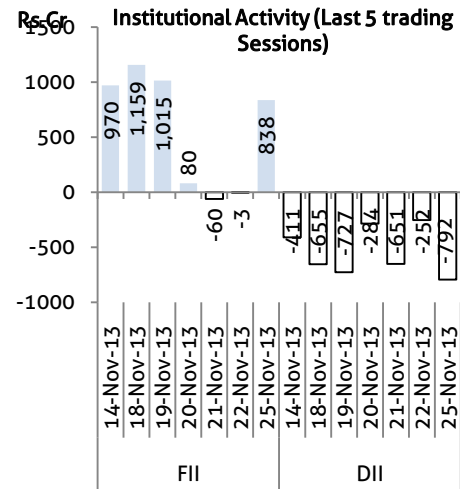
❖London-based Essar Energy reported a 7% decline in its operating profit to \$543.7 million in the six months to September, from \$582.6 million a year ago as a weak rupee offset higher margins at its flagship Vadinar refinery. (BS)

❖Asian Paints Ltd said its wholly owned subsidiary, Asian Paints Industrial Coatings Ltd (APICL) has closed down the operations of its powder coatings plant in Himachal Pradesh due to significant decline in the processing volume of powder coatings for the last two years. (BS)

❖Kalpataru Power Transmission (KPTL), a leading global EPC player in the power and infrastructure contracting sector, said it has bagged orders worth over Rs 1,000 crore in domestic and international markets. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3537	0.0020	0.15
GBP-USD	1.6167	0.0012	0.07
USD-JPY	101.50	(0.17)	(0.17)

Bond Markets	Closing	Chg
10-yr bond	9.02	-7.1 bps
Interbank call	8.69	1.0 bps



## Domestic News (Cont...)

❖ Titan Industries Ltd, a joint venture between Tata Group and Government of Tamil Nadu, is expanding its watch case manufacturing capacity and precision equipment manufacturing capacity for aerospace components with a total investment of Rs 180 crore. (BS)

❖ Tata Steel Ltd has emerged as the regional champion in the 8th Virtual Steel Making Challenge 2013-14 organized by World Steel Association, the company said in a release. (BS)

❖ France-based Schneider Electric plans to export equipment to West Asia, Australia, Brazil and other countries from the Chennai plant which was opened. (BS)

❖ Techno Electric & Engineering Company Ltd said it has bagged the concession for Rs 200 crore project from PFC Consulting to build transmission network in Punjab. (BS)

❖ Leading bourse National Stock Exchange (NSE) gave its approval to merger of Alliance Coffee with its listed parent firm Tata Coffee saying the amalgamation does not violate provisions of securities law. (BS)

❖ British fair trade watchdog OFT said Diageo's acquisition of United Spirits is against competition and may lead to higher whisky prices in the UK. (BS)

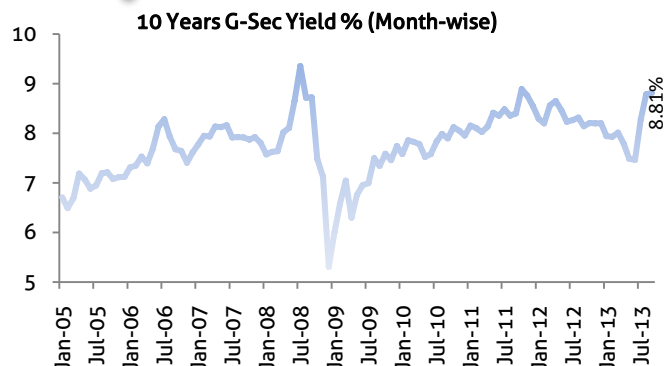
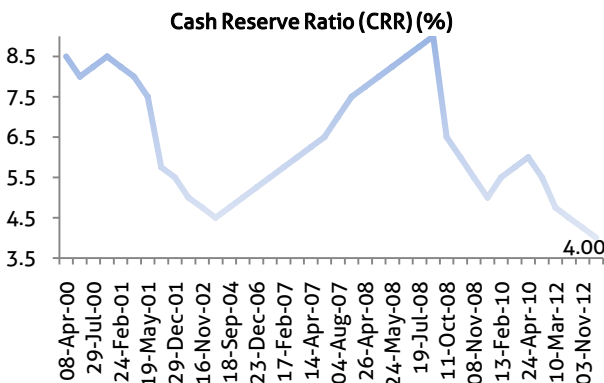
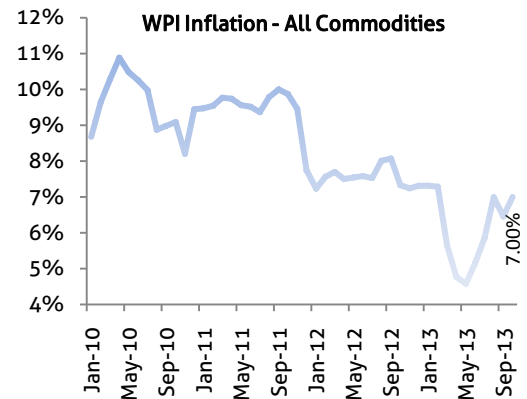
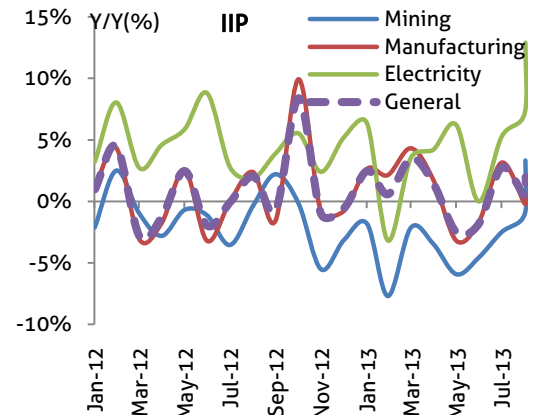
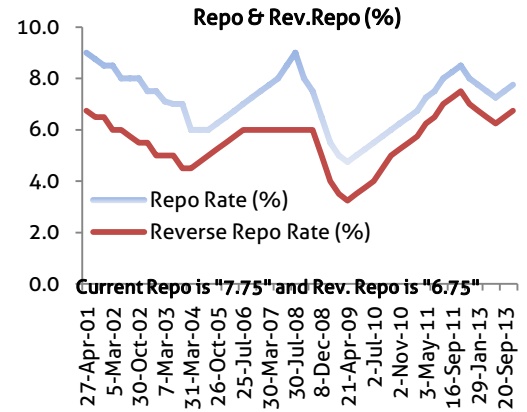
❖ The Department of Telecom is expected to approve Airtel's conditional request to migrate to the new Unified Licence regime, which is more liberal compared to the existing one, according to sources. (BS)

❖ India's leading software firm Tata Consultancy Services is likely to open its largest delivery centre at Adibatla here by early next fiscal. (BS)

❖ Lupin Ltd, India's No. 4 drug maker by revenue, may come from the land of cheap generics but it is betting on high-margin branded drugs in the United States to drive growth. (BS)

❖ Indian refiners are ready to start transferring cash owed for Iranian oil as early as next week following a landmark deal to curb Tehran's nuclear programme that allows importers to shift billions of dollars back to Iran. (BS)

❖ The public issue of state-owned steel maker RINL will depend on stock market conditions and is likely to take some more time, Steel Secretary G Mohan Kumar said here. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Nov-13	Yes Bank Limited	MORGAN STANLEY ASIA (SINGAPORE) PTE	SELL	1971903	349.51
25-Nov-13	Aban Offshore Ltd.	URMILA DOSHI	BUY	234280	345.26
25-Nov-13	Aban Offshore Ltd.	CROSSEAS CAPITAL SERVICES PVT. LTD.	SELL	242164	330.86
25-Nov-13	Aban Offshore Ltd.	CROSSEAS CAPITAL SERVICES PVT. LTD.	BUY	242186	329.98
25-Nov-13	Yes Bank Limited	MORGAN STANLEY ASIA (SINGAPORE) PTE	BUY	18042	348.53

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Nov-13	Aban Offshore	A K G SECURITIES AND CONSULTANCY LTD	S	345,237	337.63
25-Nov-13	Aban Offshore	A K G SECURITIES AND CONSULTANCY LTD	B	345,237	337.5
25-Nov-13	Orient Abr-\$	LTS INVESTMENT FUND LTD	B	1,123,346	17.85
25-Nov-13	Parikh Herbals	C H P FINANCE PVT LTD	B	737,000	20.85
25-Nov-13	Aagam Cap	Lekhraj Lalwani	S	80,000	128.75

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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
526881	Financial Tech	05-Dec-13	2nd Interim Dividend - Rs.-	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
500312	ONGC	10-Dec-13	Interim Dividend - Rs.-	11-Dec-13
519295	Bambino Agro	19-Dec-13	Dividend - Rs.1.50	-
532920	Empee Dist	19-Dec-13	Dividend - Rs.1.00	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
25-Nov-13	USD	Pending Home Sales (MoM)		2.00%	-5.60%
25-Nov-13	USD	Dallas Fed Mfg Business Index			3.6
26-Nov-13	USD	Building Permits (MoM)			-2.90%
26-Nov-13	USD	Housing Starts (MoM)			
26-Nov-13	USD	House Price Index (MoM)			0.30%
26-Nov-13	USD	CB Consumer Confidence		72.5	71.2
26-Nov-13	USD	Richmond Manufacturing Index			1
27-Nov-13	GBP	GDP (YoY)		1.50%	1.50%
27-Nov-13	USD	Initial Jobless Claims			
27-Nov-13	USD	MBA 30-Year Mortgage Rate			4.46%
27-Nov-13	USD	Chicago Fed National Activity			0.14
27-Nov-13	USD	Durable Goods Orders (MoM)		-1.50%	3.80%
27-Nov-13	USD	Chicago PMI		62	65.9
27-Nov-13	USD	Michigan Consumer Sentiment			72
28-Nov-13	EUR	Business Climate		0.1	0
28-Nov-13	EUR	Consumer Confidence		-15	-14.5
28-Nov-13	EUR	Industrial Sentiment		-5	-4.8
29-Nov-13	JPY	Manufacturing PMI			54.2
29-Nov-13	JPY	Tokyo CPI (YoY)			0.60%
29-Nov-13	JPY	Industrial Production (MoM)			1.30%
29-Nov-13	GBP	GfK Consumer Confidence		-10	-11
29-Nov-13	JPY	Construction Orders (YoY)			89.80%
29-Nov-13	JPY	Housing Starts (YoY)			19.40%
29-Nov-13	GBP	BoE Consumer Credit		0.60B	0.41B
29-Nov-13	GBP	Mortgage Approvals		68K	67K
29-Nov-13	EUR	Unemployment Rate		12.20%	12.20%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
27-Nov-13	INR	Indian M3 Money Supply			14.10%
29-Nov-13	INR	Indian Bank Loan Growth			16.40%
29-Nov-13	INR	Indian GDP Quarterly (YoY)			4.40%

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