

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8476	0.15	CNX IT	11770	(0.17)
Sensex	28386	0.17	BANK NIFTY	17976	(0.34)
DowJones	17828	0.07	S&P CNX 500	6825	0.22
Nasdaq	4787	0.61	CNX FMCG	19957	1.30
Hangseng	24058	(0.23)	CNX REALTY	4028	0.41
Shanghai	2609	0.17	CNX AUTO	8334	0.38
Nikkei	17332	(0.30)	CNX ENERGY	9424	0.06
Strait Times	3352	0.06	CNX PHARMA	11154	(0.22)
Kospi	1985	0.22	Advances / Declines	BSE	NSE
Taiwan	9180	0.63	Advances	1666	919
FTSE	6729	(0.03)	Declines	1245	568
CAC	4373	(0.20)	Unchanged	115	75
DAX	9916	0.55	Total	3026	1562

Nifty Gainers		
Company	Price(Rs)	Chg(%)
DLF	152.00	7.08
GAIL	490.80	2.84
BHEL	271.50	2.26
ITC	363.40	2.25
ASIANPAINT	707.10	2.22

Nifty Losers		
Company	Price(Rs)	Chg(%)
ZEEL	375.00	(4.79)
JINDALSTEL	142.40	(3.03)
BHARTIARTL	392.20	(2.82)
HCLTECH	1632.00	(1.54)
ICICIBANK	1711.00	(1.51)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
GUJRATGAS	6.62	1.0	7
DIVISLAB	1.24	0.2	6
FULFORD	0.31	0.1	6
JBFIND	7.71	1.6	5
SSWL-\$	1.40	0.3	5

Indian Forex	Closing	Chg	% Chg
USD/INR	61.866	(0.054)	(0.09)
GBP/INR	97.228	0.108	0.11
EUR/INR	77.215	0.286	0.37
JPY/INR	52.560	0.040	0.08

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26363	(137)
Silver (Rs/1kg)	36605	(170)

Commodities	Price	% Chg.
Crude (US\$/BBL)	73.1	(1.04)
Brent (US\$/BBL)	77.2	(1.27)
Gold (US/oz)	1196.4	(0.22)
Silver (US\$/oz)	16.5	(0.66)
Copper (US\$/MT)	6649.0	(0.70)
Alum (US\$/MT)	2099.0	0.72
Zinc(US\$/MT)	2272.5	(0.66)

ADR	Cl. Values	% Chg.
ICICI Bank	57.59	(0.16)
HDFC Bank	51.87	0.49
Infosys	69.87	1.02
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	58.24	0.73
Wipro	12.85	0.07
Tata Motors	44.83	(1.26)

Market Sensor

US market gained on Wednesday, with the Dow and S&P 500 finishing at records, as investors considered reports on manufacturing and housing in assessing the strength of the U.S. economy. Dow Jones Industrial Average was up 0.07% or 12.81 points at 17827.75. Nasdaq Composite was up 0.61% or 29.07 points at 4787.32. Standard & Poor's 500 was up 0.28% or 5.80 points at 2072.83.

Indian equity market regained days losses and turned positive at the end of the day. Positive global cues and hope of rate cut by RBI boosted the market sentiment. Nifty ended the previous trading session with a gain of 0.15% or 12.65 points at 8475.75. On Wednesday's trading session, FIIs bought net Rs.181.46 Cr in cash market and sold net Rs.68.85 in derivative segment. Whereas, DII sold net Rs.314.64 Cr in cash segment.

Coming to today's trade Nifty might to remain volatile due to the expiry of the F&O contract, crucial intraday support seen at 8440 followed by 8370 while resistance exist at 8490 and then at 8550.

Global News

❖ China's central bank refrained from selling repurchase agreements in open-market operations for the first time since July, loosening monetary policy further after cutting interest rates for the first time since 2012. (Bloomberg)

❖ Industrial profits in China fell the most in two years, underscoring the need for looser monetary conditions as the world's second-largest economy slows. (Bloomberg)

❖ Growth in the world's largest economy got off to a slower start in the fourth quarter as U.S. consumer spending, equipment orders and new-home sales were weaker than forecast in October. (Bloomberg)

❖ Consumer spending in the U.S. climbed in October at the same pace as incomes, showing households are staying within their means as the holiday-shopping season begins. (Bloomberg)

❖ The European Commission proposed a 315 billion-euro (\$394 billion) investment plan based on guarantees and a small amount of seed money in order to offer European Investment Bank funds to a wider range of projects. (Bloomberg)

Economic News

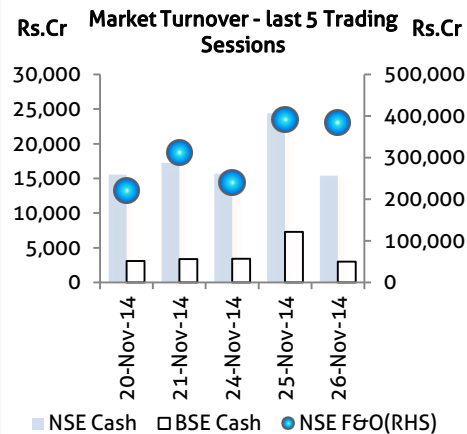
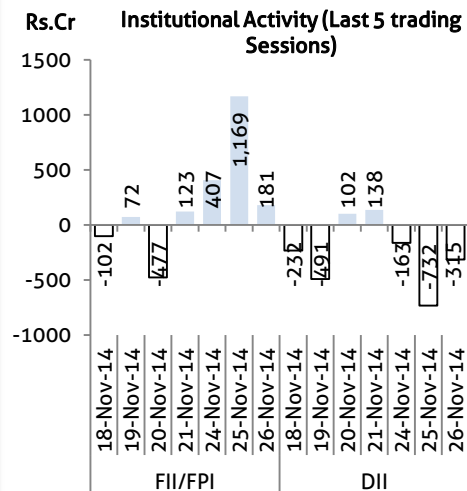
- ❖ Refuting opposition charges that little was being done to get back illicit money stashed away by Indians abroad, Finance Minister Arun Jaitley said a lot of ground has been covered and 250 people have conceded to overseas bank accounts. (BS)
- ❖ Responding to the proposal of the government to give comments to the draft rules for re-allocation of coal mines, the private power producers have suggested that requirement of the sector and bidders should be given preference while allocating the coal blocks. (BS)
- ❖ Delhi Metro Rail Corporation has earned a total revenue of Rs 9,905.62 crore from 2004-05 to 2013-14, but incurred a loss of over Rs 90 crore in the same ten year-period. (BS)
- ❖ Lamenting that implementation of rural job programme MGNREGS has come to a halt in Odisha due to paucity of funds, Chief Minister Naveen Patnaik asked the centre to immediately release Rs 1195.40 crore to the state to resume it. (BS)
- ❖ India sought investments from both public and private sector companies in the Arab region in areas such as infrastructure and railways to further boost economic ties between the regions. (BS)
- ❖ India is all set to sign the Trade Facilitation Agreement (TFA) at WTO's special General Council (GC) meeting in Geneva. (BS)
- ❖ Cotton production in India is estimated at 40.55 million bales in 2014-15, higher than previous year's 35.5 million bales, the Cotton Association of India (CIA) said on November 26. "Cotton production, which was 15.80 million bales in 2001-02, has more than doubled and is estimated at 40.55 million bales of 170 kg each during 2014-15," CAI president Dhiren Sheth said. (ET)
- ❖ In a major boost to the government's labour reforms and skill development initiatives, the Rajya Sabha on Wednesday passed the Apprenticeship Amendment Bill with a voice vote, paying way for industry to take on the task of imparting skills to millions of youth entering the labour workforce every year without much fear. (ET)
- ❖ The finance ministry has revived a proposal to set up a holding company for state-run banks that will find it easier than individual lenders to raise capital and deploy it in banks that need it the most. (ET)
- ❖ India is unlikely to appeal against decisions by the Bombay High Court in the Shell and Vodafone transfer pricing cases as the Narendra Modi government looks to send out a strong signal that it's abiding by a pledge to put in place a non-adversarial tax regime and restore the country's appeal as a destination for investors. (ET)
- ❖ The World Trade Organization postponed adoption of the first global trade reform in its 19-year history on Wednesday, delaying by a day after a last-minute objection from Argentina, diplomats said. (ET)

Domestic News

- ❖ Orchid Healthcare Pvt Ltd, a promoter group firm of Orchid Chemicals and Pharmaceuticals Ltd, would pick up stakes to infuse Rs 92.17 crore into the company through preferential allotment of shares, as part of promoter's contribution under the Corporate Debt Restructuring (CDR) package. (BS)
- ❖ Petroleum minister Dharmendra Pradhan said international expert D&M will in June submit its report on ONGC's claim that Reliance Industries had extracted gas from its fields in KG basin. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.2500	(0.0006)	(0.05)
GBP-USD	1.5786	(0.0006)	(0.04)
USD-JPY	117.57	(0.16)	(0.14)

Bond Markets	Closing	Chg
10-yr bond	8.21	0.4 bps
Interbank call	7.93	7.41 bps



Domestic News (Cont...)

❖ Franchise India, an integrated franchise solution company has tied up with leading diversified financial services group Religare Enterprises Ltd to provide Rs 500 crore loan for small businesses, especially franchise owners in a span of two years. (BS)

❖ Tyre manufacturer MRF Ltd has posted an increase of 72% in net profit at Rs 316.9 crore for the quarter ended September 30, 2014, as compared to net profit of Rs 184.10 crore posted for the same three months of previous year. (BS)

❖ India's largest private sector petroleum explorer Reliance Industries (RIL) pipped its state-run counterpart Oil and Natural Gas Corporation (ONGC) on transparency within two years through 2014, according to reports published by Transparency International (TI). (BS)

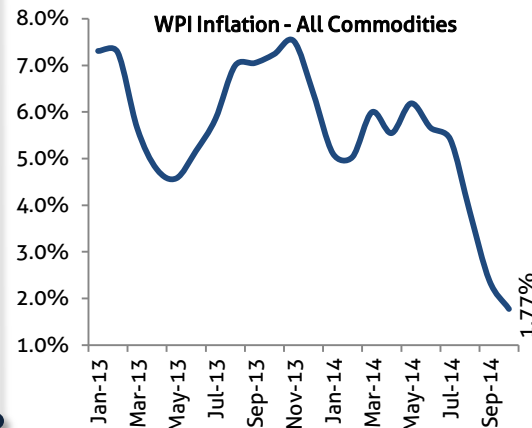
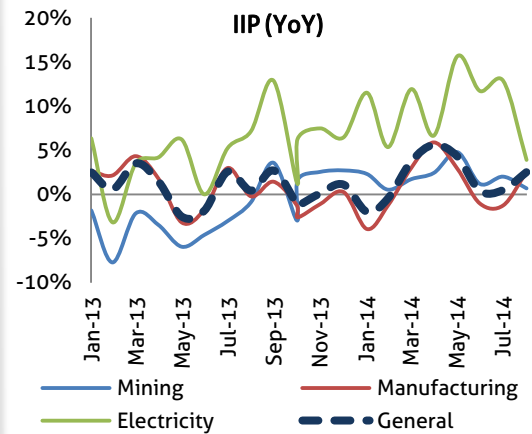
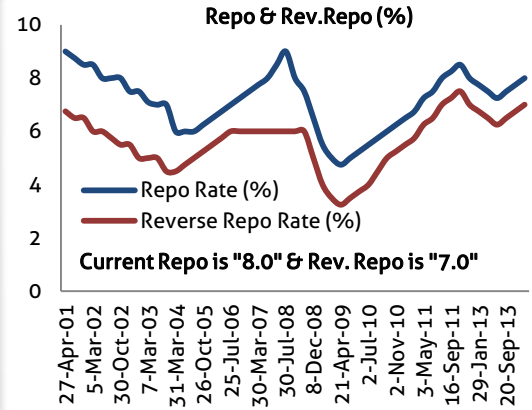
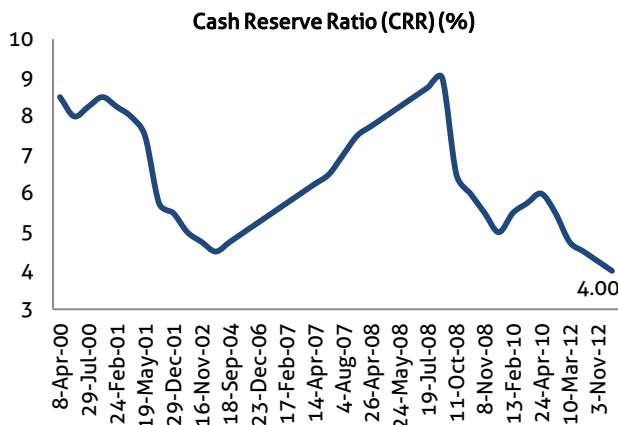
❖ The revival plan of Madras Fertilisers Ltd (MFL), a sick unit under the Department of Fertilisers, was returned by the Department of Public Enterprises (DPE) as several seats including that of the Chairman remains vacant in the Board for Reconstruction of Public Sector Enterprises (BRPSE), which has to consider and approve the revival plan. (BS)

❖ After a lull, corporates and financial services companies have increased renting office properties. Net office uptake has gone up 36% in September quarter of this year compared to same period last year, says a new survey. (BS)

❖ Regulatory delays, lack of financing and increase in cost of raw materials has led to profits of the construction sector decline by 28.5% in FY14. According to Dun & Bradstreet India's research note, 'India's Leading Infrastructure Companies 2014', the decline is largely attributed to a sharp 17.6% rise in the sector's interest costs, on increasing debt levels. (BS)

❖ Drug firm Ranbaxy Laboratories said the DC Federal Court in the US has not granted the company temporary restraining order to block the US health regulator from approving other ANDAs for generic versions of digestive disorder medicine Nexium and anti-viral Valcyte. (BS)

❖ The Credit Information Bureau (India) Ltd (CIBIL), India's first credit information company, has said that it has written to Reserve Bank of India (RBI), Irda and Trai to enable the Bureau to collect data from service providers that would facilitate the first time borrowers to have an indicative credit score. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Nov-14	Eveready Industries India	BAKSHU PROPERTY PVT LTD	BUY	400000	184.7
26-Nov-14	Era Infra Engineering Ltd	IFCI LTD.	SELL	1425535	6.6
26-Nov-14	Autoline Industries Limit	ANKITA VISHAL SHAH	SELL	80548	83.1
26-Nov-14	Bal Pharma Limited	SUNITHA KUMAR SHETH	SELL	71755	89.9
26-Nov-14	Vikas GlobalOne Ltd	OJAS ASSET RECONSTRUCTION COMPANY LIMITED	BUY	800000	6.5

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Nov-14	PARRYSUGAR	GRANDHI ENTERPRISES PRIVATE LIMITED	B	4,397,295	21.0
26-Nov-14	FULFORD	ITF MAURITIUS	B	30,000	2099.0
26-Nov-14	AMRUTANJAN-\$	SECURITIES CAPITAL INV.LTD	B	80,000	461.5
26-Nov-14	GENNEX	VAB VENTURES LIMITED	S	2,000,000	4.5
26-Nov-14	INNOVENT	HASMUKHBHAI MANILAL SHAH	B	126,800	65.8

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
538433	CCFCL	27-Nov-14	Stock Split from Rs. 10/- to Re. 1/-	28-Nov-14
532457	GULPOLY	27-Nov-14	Interim Dividend - Rs.1.75	28-Nov-14
536922	H370N28DD1	27-Nov-14	Redemption of Mutual Fund	28-Nov-14
536924	H370N28DF1	27-Nov-14	Redemption of Mutual Fund	28-Nov-14
536921	H370N28DG1	27-Nov-14	Redemption of Mutual Fund	28-Nov-14
536923	H370N28DQ1	27-Nov-14	Redemption of Mutual Fund	28-Nov-14
536926	H370N28RD1	27-Nov-14	Redemption of Mutual Fund	28-Nov-14
536925	H370N28RG1	27-Nov-14	Redemption of Mutual Fund	28-Nov-14
536927	H370N28RQ1	27-Nov-14	Redemption of Mutual Fund	28-Nov-14
532859	HGS	27-Nov-14	2nd Interim Dividend - Rs.5.00	28-Nov-14
523539	PRECWIRE	27-Nov-14	Interim Dividend - Rs.2.00	28-Nov-14
517500	ROTO	27-Nov-14	Stock Split from Rs.10/- to Rs.2/-	28-Nov-14
516072	VISHNU	27-Nov-14	Interim Dividend - Rs.1.00	28-Nov-14
500163	GODFRYPHLP	28-Nov-14	Stock Split from Rs.10/- to Rs.2/-	01-Dec-14
536914	RMFFM21ERD	28-Nov-14	Dividend On Mutual Fund	01-Dec-14
500209	INFY	02-Dec-14	BONUS 1:1	03-Dec-14
500102	BALLARPUR	03-Dec-14	Dividend - Rs.0.20	-
509895	HINDMILL	04-Dec-14	Dividend - Rs.10.00	-
532174	ICICIBANK	04-Dec-14	Stock Split from Rs.10/- to Rs.2/-	05-Dec-14
533602	LESHAIND	04-Dec-14	Reduction of Capital	05-Dec-14
533602	LESHAIND	04-Dec-14	Scheme of Arrangement	05-Dec-14
532932	MANAKSIA	04-Dec-14	Scheme of Arrangement	05-Dec-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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