

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6059	(0.92)	CNX IT	8758	(0.29)
Sensex	20425	(0.87)	BANK NIFTY	10909	(1.57)
DowJones	16073	0.00	S&P CNX 500	4679	(0.78)
Nasdaq	4018	0.58	CNX FMCG	16606	(0.94)
Hangseng	23673	(0.04)	CNX REALTY	171	(1.02)
Shanghai	2182	(0.04)	CNX AUTO	5201	0.49
Nikkei	15469	(0.30)	CNX ENERGY	7669	(1.19)
Strait Times	3170	(0.10)	CNX PHARMA	7273	(0.88)
Kospi	2015	(0.39)	Advances / Declines	BSE	NSE
Taiwan	8290	0.51	Advances	1034	413
FTSE	6636	(0.87)	Declines	1481	754
CAC	4278	(0.57)	Unchanged	139	56
DAX	9290	(0.11)	Total	2654	1223

Nifty Gainers		
Company	Price(Rs)	Chg(%)
LUPIN	867.00	1.93
BHEL	147.00	1.87
SSLT	177.00	1.40
HINDUNILVR	587.95	1.20
HEROMOTOCO	2050.00	1.17

Nifty Losers		
Company	Price(Rs)	Chg(%)
BPCL	324.00	(6.74)
BANKBARODA	608.50	(3.88)
NMDC	126.40	(3.47)
ICICIBANK	1045.40	(2.72)
CAIRN	322.80	(2.51)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Shree Cement	1.68	0.00	1209
Riddhi Siddhi-\$	3.00	0.01	545
DIC India	1.99	0.03	61
United Spirits	71.87	1.40	51
Care	0.78	0.03	23

Indian Forex	Closing	Chg	% Chg
USD/INR	62.447	(0.130)	(0.21)
GBP/INR	100.864	(0.560)	(0.55)
EUR/INR	84.504	(0.196)	(0.23)
JPY/INR	61.510	0.080	0.13

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30600	540
Silver (Rs/1kg)	45175	950

Commodities	Price	% Chg.
Crude (US\$/BBL)	93.5	(0.92)
Brent (US\$/BBL)	111.0	0.09
Gold (US/oz)	1243.8	(0.72)
Silver (US\$/oz)	19.9	(1.68)
Copper (US\$/MT)	7071.0	0.05
Alum (US\$/MT)	1735.0	0.06
Zinc(US\$/MT)	1873.0	0.05

ADR	Cl. Values	% Chg.
ICICI Bank	34.41	(0.93)
HDFC Bank	32.61	(0.60)
Infosys	53.59	0.36
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	38.92	(0.49)
Wipro	11.45	(0.09)
Tata Motors	31.80	0.53

Market Sensor

US market rose on Tuesday, as better-than-expected reports on housing ignited a rally among home builders. Dow Jones Industrial Average ended flat at 16072.80. Nasdaq Composite was up 0.58% or 23.18 points at 4017.75 Standard & Poor's 500 was up 0.01% or 0.27 points at 1802.75.

Indian market settled on a negative note yesterday on weak global cues and rising USDINR. Nifty ended the previous trading session with a decline of 0.92% or 56.25 points at 6059.10. On Tuesday's trading session, FII sold net Rs.339.16 Cr in cash market and sold net Rs.780.17 in derivative segment. Whereas, DII sold net Rs.356.9 Cr in cash segment.

Coming to today's trade Nifty to remain volatile while crucial intraday support seen at 6010 breach of which can witness lower levels of 5970.

Global News

❖ Building permits climbed in October to the highest level in more than five years, signaling the U.S. residential real-estate market will strengthen in 2014. (Bloomberg)

❖ Italy's government bonds rose, with two-year yields dropping the most in almost three weeks, as the nation's borrowing costs fell at an auction before lawmakers vote on the future of former Premier Silvio Berlusconi tomorrow. (Bloomberg)

❖ Confidence among U.S. consumers unexpectedly declined in November to a seven-month low as Americans grew more pessimistic about the labor-market outlook. (Bloomberg)

❖ Chinese companies' borrowing costs are climbing at a record pace relative to the government's, increasing the risk of defaults and prompting state newspapers to warn of a limited debt crisis. (Bloomberg)

❖ Home prices in 20 U.S. cities rose by the most since February 2006 in the 12 months through September, showing the housing market sustained progress even as borrowing costs climbed. (Bloomberg)

❖ Hungary's central bank cut its benchmark interest rate to a record low and signaled that further monetary easing is possible after the inflation rate fell below 1 percent. (Bloomberg)

Economic News

❖ Mining states of West Bengal, Madhya Pradesh and Odisha told the Supreme Court that they were in no way involved in coalgate and squarely blamed the Centre for alleged irregularities in coal blocks allocation. (BS)

❖ The Food Ministry will soon seek Cabinet nod for providing interest-free loans to cash-starved sugar mills to help them meet working capital requirements. (BS)

❖ Committed to contain fiscal deficit within the redline drawn by Finance Minister P Chidambaram, the government may trim planned expenditure by over Rs 80,000 crore or about 15% of the budgeted amount in the current fiscal. (BS)

❖ The Ministry of Commerce and Industry has proposed tighter overseas investment norms in existing drug companies by limiting all forms of foreign participation in them, including FII and FDI, at 49%. (BS)

❖ Peak power deficit in the country shrunk to 3% in October, as against 9.4% in the same month last year, helped by higher hydel generation due to heavy rains and lower industrial growth. (BS)

❖ A bill to set up a coal regulatory authority may be placed in Parliament during the winter session, a top government official said. (BS)

❖ Home buyers expect prices to fall in the next 6 months as indicated by housing sentiment index that fell by 20% during July-September compared to the previous quarter, according to a survey by Indian Institute of Management Bangalore and property portal Magicbricks. (BS)

❖ Fuelled by growth in sectors like real estate, infrastructure, retail, automotive and food & beverages, the country's glass industry will acquire a market size worth Rs 340 billion by 2015 from Rs 225 billion at present, according to a study by industry body Assocham. (BS)

❖ As India and China roll out fourth generation or LTE mobile networks, Asia is expected to account for 47% of all 4G connections by 2017, a study by global telecom body GSM Association (GSMA) said. (BS)

❖ Oil Minister M Veerappa Moily ruled out reversal of the decision to double natural gas prices from April 1 next year and said that the notification on this will be issued shortly. (BS)

Domestic News

❖ Realty firm Omaxe said its promoters have raised Rs 244 crore by selling shares through the OFS route and the funds would be infused into the company to boost growth. (BS)

❖ The Department of Telecom is working on issuing fresh show-cause notices to Vodafone, Idea Cellular and Airtel for allegedly violating licence conditions while renting SIM cards to Matrix Cellular in Delhi. (BS)

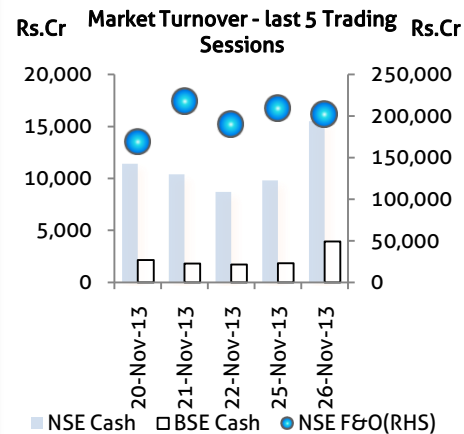
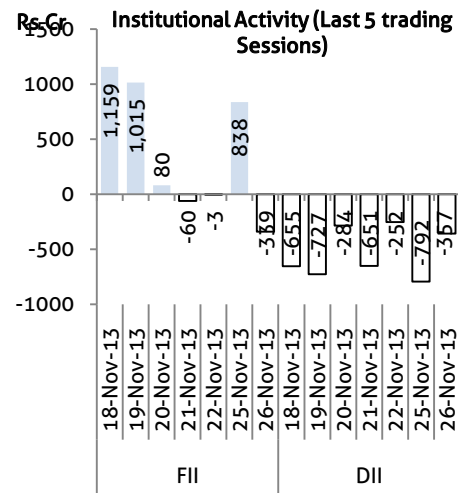
❖ Infosys chief N.R. Narayana Murthy has said the company is looking at reducing the number of top officials and subcontractors at onsite locations in a bid to reduce operational costs, according to Barclays. (BS)

❖ British telecom major Vodafone said it is in talks with the Indian government to establish a framework for resolving the Rs 11,200 crore tax dispute. (BS)

❖ Tata group air conditioning and engineering services firm Voltas said it has bagged three overseas project orders worth Rs 1,000 crore in the West Asia. (BS)

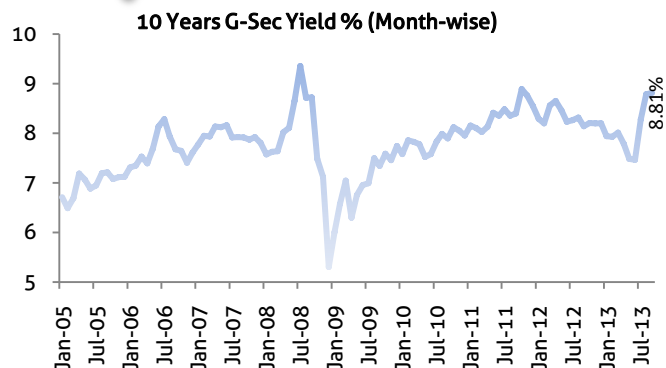
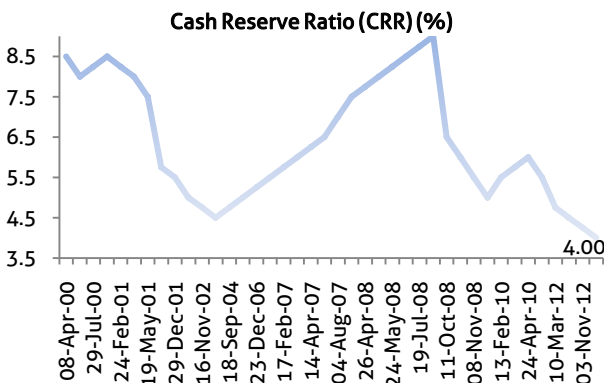
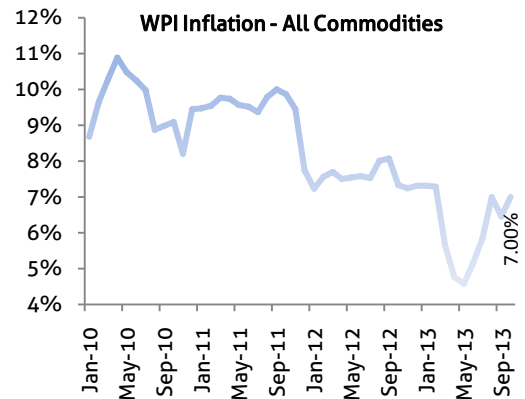
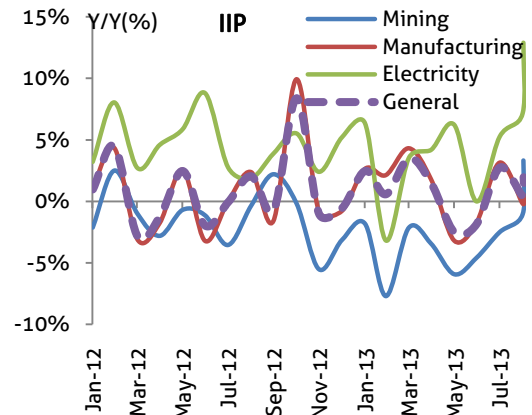
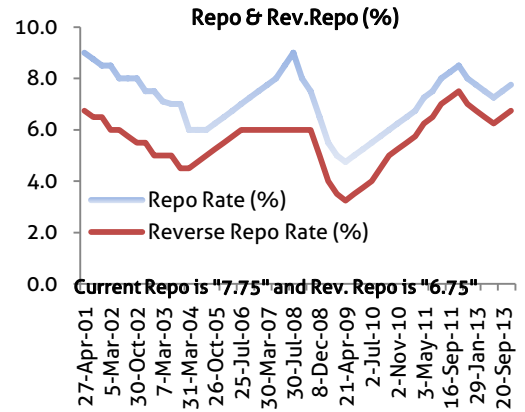
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3563	(0.0009)	(0.07)
GBP-USD	1.6200	(0.0016)	(0.10)
USD-JPY	101.39	0.10	0.11

Bond Markets	Closing	Chg
10-yr bond	8.95	-6.9 bps
Interbank call	8.68	-1.0 bps



Domestic News (Cont...)

- ❖ Country's largest software services firm Tata Consultancy Services (TCS) said it has bagged a deal from Keler Ltd, Hungary's Central Securities Depository. (BS)
- ❖ State-run SAIL has initiated the process to appoint a mine developer-cum-operator (MDO) for Sitanala coking coal block even though it is yet to get the lease allocation from the Jharkhand government, a source said. (BS)
- ❖ Taro Pharma, Israel-based subsidiary of Sun Pharmaceuticals, has started a tender offer to buy back up to \$200 million of its ordinary shares. (BS)
- ❖ Bafna Pharmaceuticals said it is looking to raise funds from various modes and is also in early stages of negotiations. (BS)
- ❖ Jindal Steel and Power Ltd launched its retail brand 'Black Panther' TMT rebars in Jharkhand. (BS)
- ❖ Turtle, the leading men's lifestyle brand, is set to achieve the target of setting up 100 outlets across India by June-July next year. (BS)
- ❖ Oil and Natural Gas Corp (ONGC) has warned its output growth and international acquisitions are under "serious threat" due to disproportionate rise in fuel subsidy burden. (BS)
- ❖ Reliance Industries Ltd (RIL) has shut another well on the main gas fields in the eastern offshore KG-D6 block due to high water ingress, leading to output plummeting to all-time low of 8.73 mmscmd. (BS)
- ❖ Mumbai's residential markets are in dire straits. About 45% of Mumbai's under-construction and ready residential properties are unsold due to weak demand and high prices, says a new report. (BS)
- ❖ Engineering major Larsen & Toubro (L&T) said it sold a 0.06% stake in L&T Finance Holdings for Rs 7.68 crore. (BS)
- ❖ Five power projects of state-run NHPC are facing cost over-runs due to delays in receiving environment and other regulatory clearances. (BS)
- ❖ Tata Power is looking for more acquisitions as part of a \$260-million-a-year investment push into renewable energy, following last month's purchase of a wind farm in western Gujarat from AES Corp, a senior official said. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Nov-13	Tech Mahindra Limited	EMERGING MARKETS SUDAN FREE EQUITY INDEX FUND	BUY	2769302	1710.24
26-Nov-13	Yes Bank Limited	EMERGING MARKETS SUDAN FREE EQUITY INDEX FUND	BUY	4169749	357.12
26-Nov-13	Unitech Ltd	EMERGING MARKETS SUDAN FREE EQUITY INDEX FUND	SELL	35218751	15.95
26-Nov-13	Canara Bank	EMERGING MARKETS SUDAN FREE EQUITY INDEX FUND	SELL	2303135	237.51
26-Nov-13	Ashoka Buildcon Ltd	IDFC INFRASTRUCTURE FUND 2	SELL	9500000	54

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Nov-13	United Spirits	MORGAN STANLEY ASIA (SINGAPORE) PTE	S	3,918,652	2406.51
26-Nov-13	Aban Offshore	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	219,001	380.59
26-Nov-13	Ridhi Siddhi-₹	MARG BIOTECH PRIVATE LIMITED	S	300,000	212
26-Nov-13	Parikh Herbals	C H P FINANCE PVT LTD	B	703,845	21.23
26-Nov-13	AMD Inds	HIND ISPAT LTD	S	732,975	12.05

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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
500680	Pfizer	05-Dec-13	Interim Dividend - Rs.360.00	06-Dec-13
517385	SYMPHONY	05-Dec-13	Dividend - Rs.6.50	-
500095	Wyeth	05-Dec-13	Interim Dividend - Rs.145.00	06-Dec-13
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
521070	Alok Inds	18-Dec-13	Dividend - Rs.0.30	-
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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