

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8494	0.22	CNX IT	11901	1.11
Sensex	28439	0.19	BANK NIFTY	18023	0.26
DowJones	17828	0.07	S&P CNX 500	6845	0.29
Nasdaq	4787	0.61	CNX FMCG	19993	0.18
Hangseng	23951	(0.22)	CNX REALTY	4045	0.44
Shanghai	2631	0.01	CNX AUTO	8379	0.54
Nikkei	17402	0.89	CNX ENERGY	9438	0.15
Strait Times	3348	0.22	CNX PHARMA	11225	0.64
Kospi	1979	(0.17)	Advances / Declines	BSE	NSE
Taiwan	9180	0.15	Advances	1579	815
FTSE	6723	(0.09)	Declines	1364	695
CAC	4382	0.20	Unchanged	126	64
DAX	9975	0.60	Total	3069	1574

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BHEL	287.00	5.86
PNB	1003.00	3.47
HINDUNILVR	791.00	2.76
TATAPOWER	92.65	2.09
HCLTECH	1664.70	1.93

Nifty Losers		
Company	Price(Rs)	Chg(%)
DLF	147.50	(3.06)
BHARTIARTL	386.70	(1.69)
GRASIM	3509.40	(1.59)
AMBUJACEM	225.75	(1.33)
TATASTEEL	460.50	(1.23)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
ORIENTCEM	10.44	1.2	9
AKZOINDIA	1.66	0.2	7
MOTILALOF5	2.26	0.3	7
KNRCON	4.61	0.6	7
GOODYEAR	5.27	0.8	7

Indian Forex	Closing	Chg	% Chg
USD/INR	61.865	(0.001)	(0.00)
GBP/INR	97.691	0.463	0.48
EUR/INR	77.375	0.160	0.21
JPY/INR	52.710	0.150	0.29

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26270	(93)
Silver (Rs/1kg)	36140	(465)

Commodities	Price	% Chg.
Crude (US\$/BBL)	68.9	(5.79)
Brent (US\$/BBL)	72.5	(6.15)
Gold (US/oz)	1184.9	(0.96)
Silver (US\$/oz)	16.2	(2.24)
Copper (US\$/MT)	6621.5	(0.41)
Alum (US\$/MT)	2099.0	0.00
Zinc(US\$/MT)	2270.5	(0.09)

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 was closed due to Thanksgiving Break

A fall in global crude oil prices to four-year low provided fresh trigger for gains for Indian stocks. Intraday volatility was high as traders rolled over positions in the futures & options (F&O) segment from November 2014 series to December 2014 series. Nifty ended the previous trading session with a gain of 0.22% or 18.45 points at 8494.20. On Thursday's trading session, FII's bought net Rs.389.73 Cr in cash market and bought net Rs.2775.98 in derivative segment. Whereas, DII bought net Rs.336.85 Cr in cash segment.

Coming to today's trade Nifty might remain volatile, crucial intraday support seen at 8440 followed by 8370 while resistance exist at 8530 and then at 8590

Global News

❖ Japan's inflation slowed for a third month and retail sales fell more than forecast, showing the economy continues to struggle from a sales-tax increase as Prime Minister Shinzo Abe heads into an election next month. (Bloomberg)

❖ Banco Bradesco SA executive Joaquim Levy pledged to fortify Brazil's fiscal accounts after being appointed as finance minister by President Dilma Rousseff, who did not attend the announcement. (Bloomberg)

❖ David Cameron will raise the prospect of Britain leaving the European Union if fellow leaders don't agree to let him restrict access to welfare payments for migrants. (Bloomberg)

❖ Mario Draghi said the European Central Bank is open to buying a wide variety of assets for further stimulus as German and Spanish inflation data highlighted the struggle to revive the euro-area economy. (Bloomberg)

❖ Prudential Plc (2378) is buying Chinese state-owned industrial companies on bets that government steps to boost their efficiency will pay off. (Bloomberg)

❖ Prime Minister Shinzo Abe has tied the Bank of Japan's hands with a delay in a sales-tax increase that's hurt confidence in the nation's finances, a former chief economist at the central bank said. (Bloomberg)

Economic News

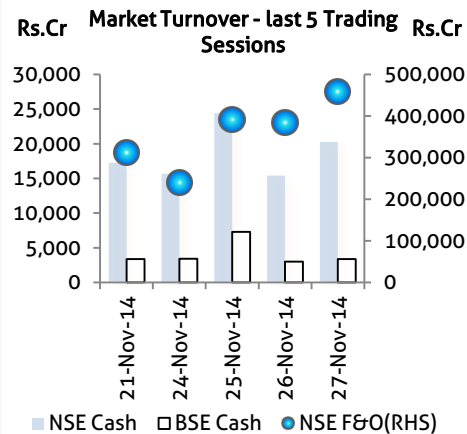
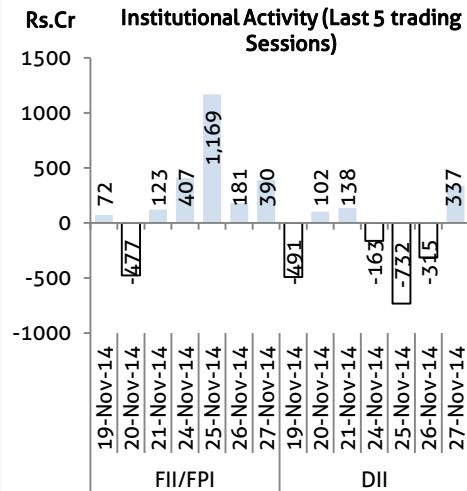
- ❖ A brief meeting between India's Prime Minister Narendra Modi and his Pakistani counterpart on Thursday salvaged a summit of South Asian leaders, with all eight countries clinching a last-minute deal to create a regional electricity grid. (BS)
- ❖ Cabinet Secretary Ajit Kumar Seth has convened a meeting of senior government officials and industry representatives tomorrow to firm up steps to ensure that India shows improvement in 'ease of doing business'. (BS)
- ❖ We can't pay on your supposedly relaxed terms, sugar mills in Karnataka are telling the state government about the latter's order on clearing cane payment arrears to farmers. (BS)
- ❖ A new Low Temperature Thermal Desalination (LTTD) Technology plant to come at the Tuticorin Thermal Powerstation in Tamil Nadu. This will convert Sea Water Into Potable Water. (BS)
- ❖ There is an overall shortfall of about 81 million tonnes of domestic coal that is needed for the power sector, the government said on Thursday. (BS)
- ❖ Finance Minister Arun Jaitley is likely to impress upon RBI governor Raghuram Rajan the need for a cut in interest rate when he meets him on Monday ahead of the central bank's bi-monthly monetary policy review. (BS)
- ❖ The Department of Fertilizers has proposed that a consortium of three state undertakings – Rashtriya Chemical and Fertilisers (RCF), Gujarat Narmada Valley Fertilisers Corporation (GNFC) and Gujarat State Fertilizers and Chemicals (GSFC) to set up urea and chemical plants in Iran. (BS)
- ❖ Anticipating data out on Friday will show weakening economic growth, the finance ministry will argue for an interest rate cut, but bankers and company executives say the key to recovery lies in how fast Prime Minister Narendra Modi acts on reforms. (BS)
- ❖ In line with its promise of increasing the list of countries to be included for Tourist Visa on Arrival enabled by Electronic Travel Authorization (ETA), 43 countries were officially announced by the NDA-government here in New Delhi today. (BS)
- ❖ Finance Minister Arun Jaitley will meet Reserve Bank of India Governor Raghuram Rajan on Dec 1 to urge a cut in interest rates when the central bank holds a policy meeting the next day, a senior finance ministry source said. (BS)

Domestic News

- ❖ Hardy Oil, a joint venture partner of Reliance Industries, said today that it is reviewing its investment in India in light of unattractive pricing and uncertainty surrounding long-term price outlook for natural gas sales. (BS)
- ❖ Faced with the diversion of India made foreign liquor after 5% mandatory blending of ethanol with petrol, independent producers and sugar mills have proposed capital expenditure of Rs 3600 crore to bridge the deficit of around 1000 million litres of India made foreign liquor (IMFL). (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.2456	(0.0011)	(0.09)
GBP-USD	1.5719	(0.0017)	(0.11)
USD-JPY	118.21	0.50	0.42

Bond Markets	Closing	Chg
10-yr bond	8.20	-0.1 bps
Interbank call	7.91	-2.58 bps



Domestic News (Cont...)

❖ Bharti Airtel, on Thursday, said it has its first fourth generation (4G) network in Africa at Seychelles in partnership with Swedish equipment vendor Ericsson. (BS)

❖ Just prior to Mukesh Ambani's launch of Reliance Jio, younger brother Anil Ambani unleashed a price war with his Reliance Communications today announcing the launch of its Pro 3- an unlimited data plan for Rs 999 a month. (BS)

❖ Gemfields, the leading supplier coloured gemstones, has discovered one of largest rubies unearthed in recent times. Weighing at 40.23 carat, the rough ruby originates from the Montepuez deposit in Mozambique. (BS)

❖ Ceat, one of India's leading tyre manufacturing companies, announced the closure of a qualified institution placement of equity shares to raise Rs 400 crore. The funds will be used for capacity expansion. (BS)

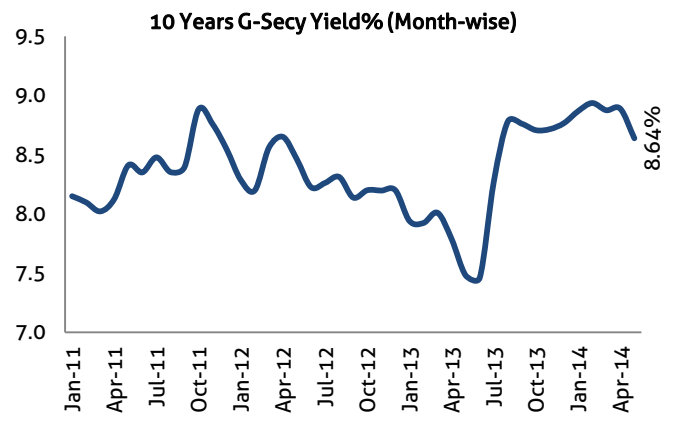
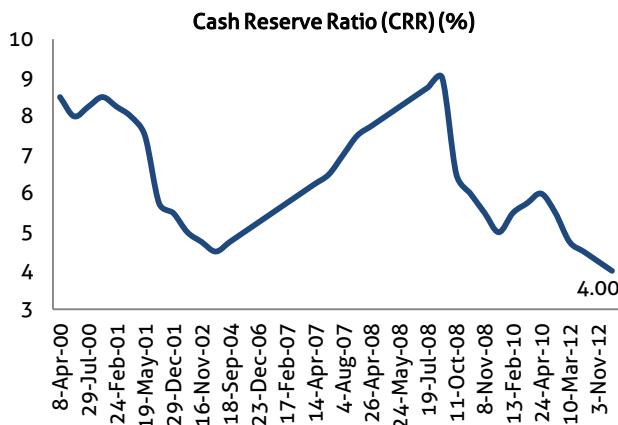
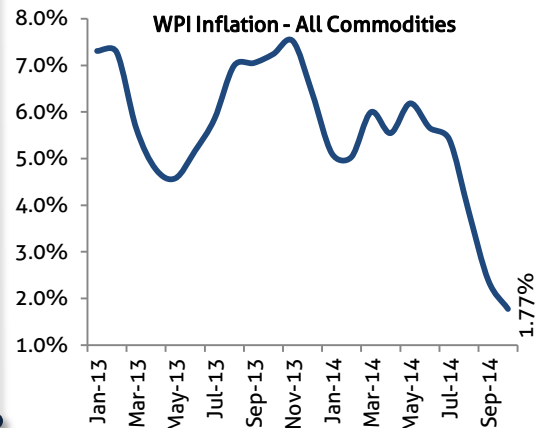
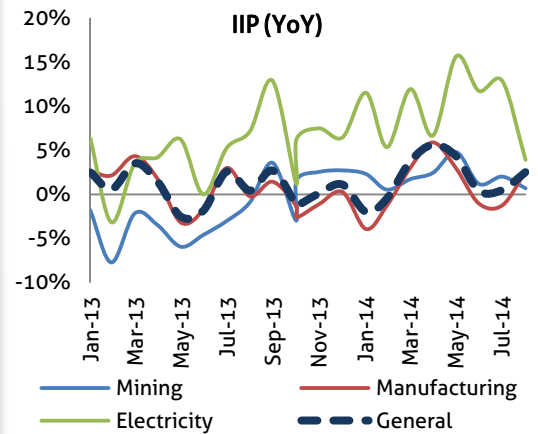
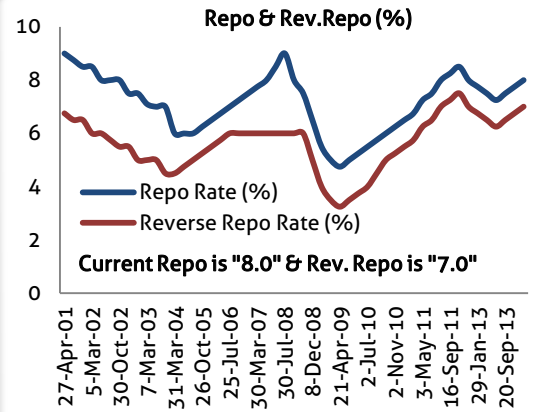
❖ German luxury car maker BMW today launched next generation M3 sedan and all new M4 Coupe in India, priced at Rs 1.19 crore and Rs 1.21 crore respectively (ex- showroom Delhi). (BS)

❖ Bharti Airtel has launched 4G service in Seychelles, which is the operator's first commercial LTE network in Africa. (BS)

❖ Domestic steel majors such as SAIL, JSW Steel and Tata Steel will have a better year ahead on the back of capacity expansions and higher utilisation, leading to rise in profitability, global ratings agency Moody's said today. (BS)

❖ Four years after relaunching its snacks portfolio, ParleProducts, the maker of the Parle range of wafers and namkeens and the Full Toss range of snacks, is looking to double turnover of the division by 2018, the company's general manager, marketing, Pravin Kulkarni, said. (BS)

❖ Put off by snarled city traffic and a shortage of parking, more Indians are shopping for groceries online, helping e-tailers like Bigbasket.com and Localbanya.com turn in profits while supermarkets are struggling. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
27-Nov-14	Crompton Greaves Ltd.	GOLDMAN SACHS SINGAPORE PTE	BUY	11295949	192.1
27-Nov-14	KSS Limited	GREEN VENTURE SECURITIES MANAGEMENT PVT LTD	SELL	1427930	13.1
27-Nov-14	Ponni Sugars (Erode) Limi	CHANDULAL SURAJMAL	BUY	119541	142.5
27-Nov-14	Dr. Datson's Labs Ltd	REKHA A KURANI	BUY	1026630	14.1
27-Nov-14	KSS Limited	GREEN VENTURE SECURITIES MANAGEMENT PVT LTD	BUY	505000	13.2

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
27-Nov-14	GOODYEAR	SBI MUTUAL FUND	B	500,000	640.0
27-Nov-14	KNRCON	KAMIDI YASHODA	S	200,000	307.0
27-Nov-14	GOKUL	CRESTA FUND LTD	S	1,200,000	19.5
27-Nov-14	EXCAST	AMIT PALA	B	510,603	38.7
27-Nov-14	NYSSACORP	POOJA V. SHAH	S	185,000	92.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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
536949	RFHXXV04D	01-Dec-14	Dividend On Mutual Fund	02-Dec-14
536950	RFHXXV04G	01-Dec-14	Redemption of Mutual Fund	02-Dec-14
536947	RFXXV04DD	01-Dec-14	Dividend On Mutual Fund	02-Dec-14
500209	INFY	02-Dec-14	BONUS 1:1	03-Dec-14
536970	TFM46AA	02-Dec-14	Dividend On Mutual Fund	03-Dec-14
536970	TFM46AA	02-Dec-14	Redemption of Mutual Fund	03-Dec-14
536972	TFM46AB	02-Dec-14	Redemption of Mutual Fund	03-Dec-14
536971	TFM46AC	02-Dec-14	Dividend On Mutual Fund	03-Dec-14
536971	TFM46AC	02-Dec-14	Redemption of Mutual Fund	03-Dec-14
536973	TFM46AD	02-Dec-14	Redemption of Mutual Fund	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
537038	TFM46BA	09-Dec-14	Dividend On Mutual Fund	10-Dec-14
537038	TFM46BA	09-Dec-14	Redemption of Mutual Fund	10-Dec-14
537040	TFM46BB	09-Dec-14	Redemption of Mutual Fund	10-Dec-14
537039	TFM46BC	09-Dec-14	Dividend On Mutual Fund	10-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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