

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8225	1.01	NIFTY IT	10087.65	0.28
Sensex	26653	0.98	NIFTY BANK	18627.80	2.22
DowJones	19124	0.01	NIFTY 500	7079.40	1.08
Nasdaq	5324	-1.05	NIFTY FMCG	20487.90	0.89
Hangseng	22985	0.86	NIFTY INFRA	2791.95	1.19
Shanghai	3273	0.72	NIFTY AUTO	9113.80	1.06
Nikkei	18732	2.31	NIFTY ENERGY	9938.95	0.24
Strait Times	2921	0.53	NIFTY PHARMA	11080.05	0.17
Kospi	1987	0.18	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9264	0.25	Advances	1765	1130
FTSE	6784	0.17	Declines	827	439
CAC	4578	0.59	Unchanged	204	87
DAX	10640	0.19	Total	2796	1656

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ICICIBANK	265.10	3.78
MARUTI	5265.00	3.48
AMBUJACEM	211.00	2.90
YESBANK	1177.00	2.84
ULTRACEMCO	3625.00	2.51

Nifty Losers		
Company	Price(Rs)	Chg(%)
IDEA	77.10	(2.71)
LUPIN	1498.35	(1.30)
GAIL	423.75	(0.99)
ZEEL	453.00	(0.96)
RELIANCE	988.15	(0.96)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
AHLUCONT	9.12	0.9	10
RAUNAQEPC	4.03	0.4	10
ESSELPRO	2.47	0.3	8
VSTIND	0.43	0.1	7
WELCORP	26.00	3.7	7

Indian Forex	Closing	Chg	% Chg
USD/INR	68.526	(0.127)	(0.19)
GBP/INR	85.534	0.308	0.36
EUR/INR	72.843	0.043	0.06
JPY/INR	60.790	(0.460)	(0.75)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28813	(37)
Silver (Rs/1kg)	40700	100

Commodities	Price	% Chg.
Crude (US\$/BBL)	49.5	9.07
Brent (US\$/BBL)	50.5	8.24
Gold (US/oz)	1170.6	(2.03)
Silver (US\$/oz)	16.4	(2.03)
Copper (US\$/MT)	5740.0	(0.66)
Alum (US\$/MT)	1722.5	0.03
Zinc(US\$/MT)	2709.0	(5.51)

ADR	Cl. Values	% Chg.
ICICI Bank	7.84	4.12
HDFC Bank	64.52	0.22
Infosys	14.48	(0.14)
Vedanta Ltd	13.40	2.13
Dr. Deddy's Labs	46.73	0.71
Wipro	9.59	0.10
Tata Motors	33.07	(0.30)

## Market Sensor

US market closed mixed on Wednesday, the last day of the month, as energy stocks surging on an OPEC deal to cut production, while investors digested solid economic data. Dow Jones Industrial Average was up 0.01% or 1.98 points at 19123.58 Nasdaq Composite was down 1.05% or 56.24 points at 5323.68 Standard & Poor's 500 was down 0.27% or 5.85 points at 2198.81

Indian Equity market gained over a percent on Wednesday and reclaimed 8200 mark, thanks to favorable domestic cues and supportive global markets. The easing of demonetization impact, appreciation in rupee, positive global cues and hopes of oil production cut by OPEC boosted the market sentiment. Nifty ended the previous day with a gain of 1.01% or 82.35 points at 8224.50. On Wednesday's trading session, FII sold net Rs.434.42 Cr in cash market and bought Rs.1547.83 Cr in derivative segment. Whereas, DII bought net Rs.676.68 Cr in cash segment.

## Global News

❖ Activity in China's manufacturing sector expanded more than expected in November, and at the fastest pace in more than two years, an official survey showed on Thursday. (Reuters)

❖ Toilet manufacturer Fenghua Ceramics Co is building a factory over farmland in north China's Tangshan city, its first major investment since 2000. While it plans to boost annual production by 20 percent, it won't be hiring more workers. (Reuters)

❖ The U.S. economy continued to expand in October and November, the Federal Reserve said on Wednesday, but there were only modest gains in wages and prices and the strong dollar was weighing on manufacturers. (Reuters)

❖ The U.S. economy needs higher interest rates although the Federal Reserve will closely scrutinize the expected changes in America's fiscal, trade and immigration policies, Cleveland Fed President Loretta Mester said on Wednesday. (Reuters)

❖ German Finance Minister Wolfgang Schaeuble called on the G20 leading economies on Wednesday to work more closely together, resisting a push towards protectionism by U.S. President-elect Donald Trump. (Reuters)

## Economic News

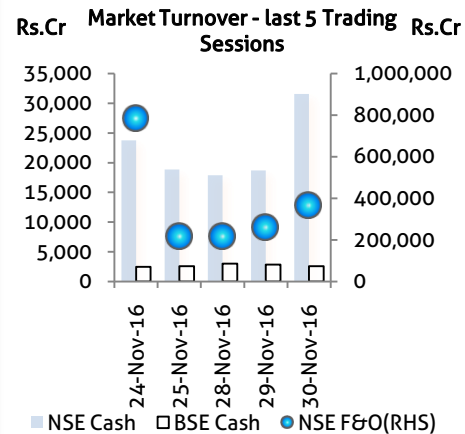
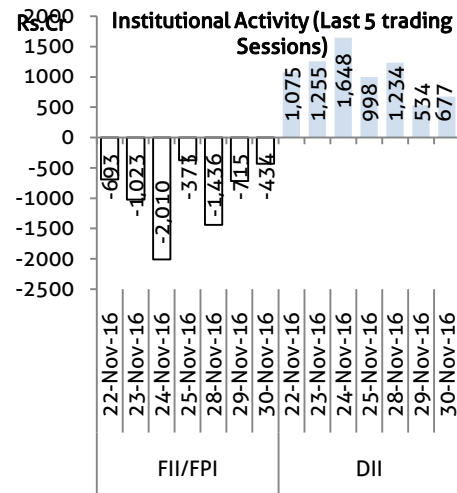
- ❖ India's economy witnessed a marginal acceleration, growing at 7.3% in the second quarter of 2016-17. Gross Domestic Product (GDP) expanded by 7.1% in the first quarter of 2016-17 and at 7.6% in the corresponding quarter last year. But the revival could stutter in the coming months, hit by an economy-wide cash-crunch following the unexpected ban on Rs 500 and Rs 1,000 currency notes.
- ❖ The fiscal deficit for the April-October period came in at Rs 4.23 lakh crore against Rs 4.11 lakh crore on a year on year basis. The fiscal deficit was 74% of the full-year target during the same period a year ago. The deficit for the first seven months of this fiscal year was 79.3% of Rs 5.34 Lakh crore FY17 Budget target.
- ❖ The Eight Core Industries comprise nearly 38% of the weight of items included in the Index of Industrial Production (IIP). The combined Index of Eight Core Industries stands at 188.1 in October, 2016, which was 6.6% higher compared to the index of October, 2015. Its cumulative growth during April to October, 2016-17 was 4.9%.
- ❖ The Reserve Bank on Wednesday permitted banks to include now-defunct Rs 500 and 1,000 notes as part of their cash balance, a move that may provide relief to banks.
- ❖ The toll collection on National Highways, which was halted in the wake of withdrawal of high-value notes, will resume from the mid-night of December 2.
- ❖ India has improved its ranking by four places to 102nd position among 136 economies in terms of enabling cross border trade, with Singapore leading the list, the World Economic Forum (WEF) said on Wednesday.
- ❖ India is the "only area of strength" in the subdued Asian steel market aided by rising demand and government measures to curb imports like MIP and anti-dumping duties, Moody's Investor Service said .
- ❖ Indian IT companies need to spread wings in markets such as China and Japan, and embrace new-generation technology-driven services quickly to fight slowdown blues and stay ahead of the curve, says industry veteran Kris Gopalakrishnan.
- ❖ It is now mandatory for all NGOs and voluntary organisations (VOs) to register with NITI Aayog to receive grant-in-aid from ministries or departments of the central government, Parliament was informed.
- ❖ In view of reports of Jan Dhan accounts being used to hoard unaccounted money, the Reserve Bank of India has curtailed the withdrawal limit from such accounts to Rs 10,000 per month.

## Domestic News

- ❖ Moody's Investors Service downgraded Reliance Communications Limited's (RCOM) corporate family rating and senior secured bond rating to B1 from Ba3. Says that while the two deleveraging transactions are credit positive, it will take at least 6-9 months for them to close.
- ❖ Oil marketing company hiked petrol prices by a marginal 13 paise a litre while diesel rates were cut by 12 paise in line with global trends.
- ❖ In a bid to sharpen focus on its core IT business, Wipro will sell its EcoEnergy division to Chubb Alba Control Systems for \$70 million. Expects deal to be completed in early 2017.
- ❖ Infrastructure major Hindustan Construction Company (HCC) will receive arbitral award payment of approximately Rs 2,000 crore from NHPC and NHA1 Ltd within 4-6 weeks.

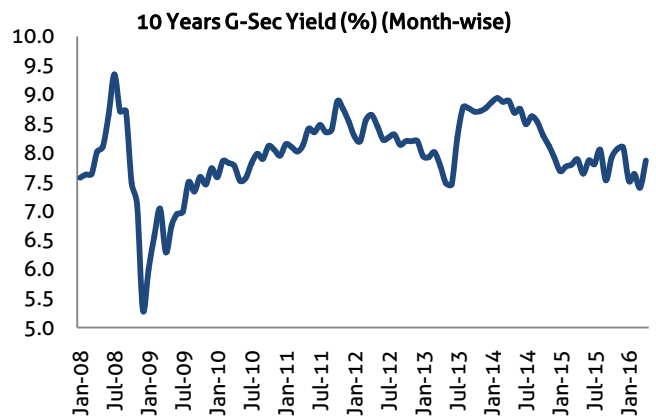
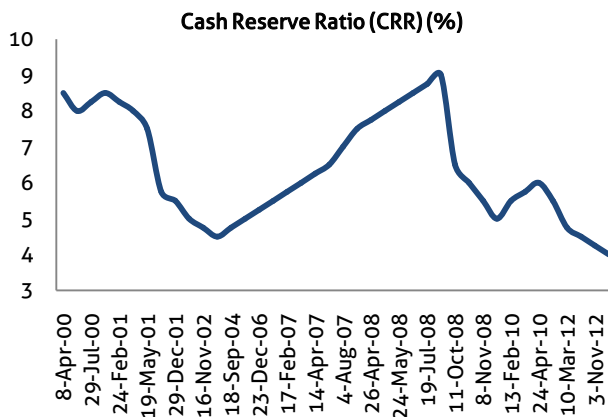
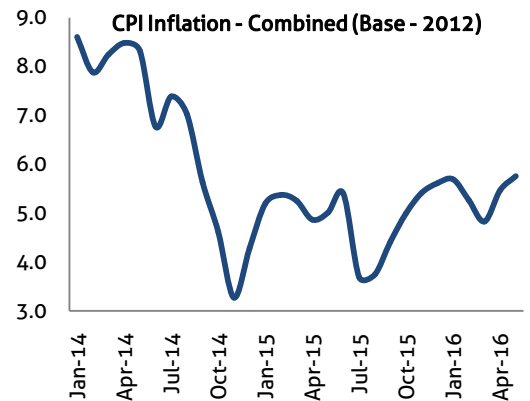
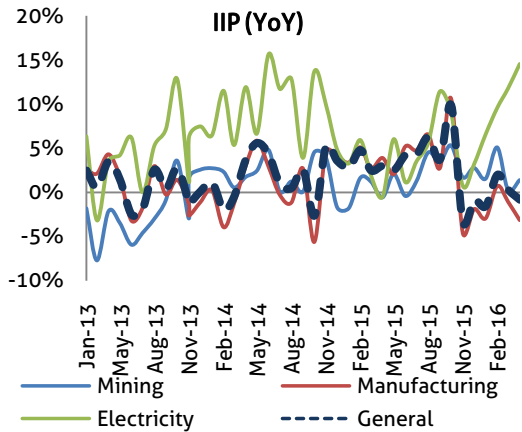
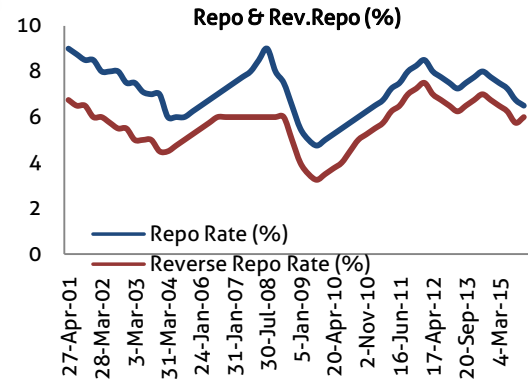
Global Forex	Closing	Chg	% Chg
EUR-USD	1.0599	0.0008	0.00
GBP-USD	1.2524	0.0017	0.14
USD-JPY	114.35	(0.1100)	(0.10)

Bond Markets	Closing	Chg
10-yr bond	6.43	-7.20 bps
Interbank call	6.26	-11.64 bps



## Domestic News (Cont...)

- ❖ The 55,000-tonne per annum (TPA) ferro-chrome plant set up by Tata Steel at a cost of Rs 542 crore in its Gopalpur Industrial Park in Ganjam district was opened by Chief Minister Naveen Patnaik.
- ❖ RBL Bank gets in-principal approval from RBI to open 'international financial service centre banking unit' at GIFT city in Gujarat.
- ❖ Ess Dee Aluminium in process of finalising a comprehensive and sustainable revival package by evaluating all available options with the existing and prospective lenders.
- ❖ 3i Infotech in advanced talks to sell its IT infrastructure management services to SREI Infrastructure Finance for Rs 300 crore.
- ❖ Tata Power revised overall sale consideration for Arutmin and related infrastructure assets now stands at \$400 million from \$510 million.
- ❖ JSW Infra looks to sell 10 percent stake for Rs 1,000 crore.
- ❖ Pinfold overseas buys additional 6.42 percent stake in Morepen Laboratories through off-market transaction. Pinfold now holds 8.56 percent stake.
- ❖ SBI merger with Bharatiya Mahila Bank gets CCI nod.
- ❖ L&T Infotech completed 100% acquisition of AugmentIQ Data Sciences
- ❖ Cyient Signs Pact To Acquire 100% Stake In UK Based Blom Aerofilms
- ❖ The US-based subsidiaries of two domestic drug firms — Sun Pharma and Cadila Healthcare — are recalling one product each from the market on account of failure to meet the desired specification norms.
- ❖ The Indian telecom sector has received foreign direct investment (FDI) of \$10 billion in the first 8 months of the current financial year, Telecom Secretary J S Deepak said here on Wednesday.
- ❖ State-run Steel Authority of India Limited (SAIL) has started commercial production of world's longest rail from its new universal rail mill (URM) in its Bhilai steel plant.
- ❖ Qess Corp board approves issue of NCDs and other debt instruments aggregating to Rs 150 crore subject to approvals.



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Nov-16	IDFC Bank Limited	SIPADAN INVESTMENTS (MAURITIUS) LIMITED	SELL	80439002	68.3
30-Nov-16	Hindustan Petroleum Corp	INTEGRATED CORE STRATEGIES (ASIA) PTE.LTD.	SELL	6070709	471.0
30-Nov-16	Bharat Forge Ltd	SUNDARAM TRADING AND INVESTMENT PVT LTD	SELL	2327000	880.0
30-Nov-16	Siti Networks Limited	BIOSCOPE CINEMAS PRIVATE LIMITED	BUY	10000000	36.4
30-Nov-16	Prakash Constrowell Ltd	SIRWANI MANOHAR ASANDAS	BUY	9376325	5.8

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Nov-16	AHLUCONT	NORGES BANK ON ACCOUNT OF THE GOVERNMENT PENSION FUND GLOBAL	S	911,513	245.0
30-Nov-16	RAUNAQEPC	GULAB MERCHANDISE PRIVATE LIMITED	B	400,000	127.8
30-Nov-16	PRAKASHCON	MANOHAR ASANDAS SIRWANI	B	5,271,245	5.7
30-Nov-16	INTENTECH	AKG FINVEST LIMITED	S	158,920	97.4
30-Nov-16	SARDAPLY	PORINJUV VELIYATH	B	50,000	127.7

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
536974	CPL	01-Dec-16	Interim Dividend - Rs. - 0.2000	02-Dec-16
500210	INGERRAND	01-Dec-16	Interim Dividend - Rs. - 3.0000	02-Dec-16
537005	IPRU2207	01-Dec-16	Redemption of Mutual Fund	-
537006	IPRU8407	01-Dec-16	Redemption of Mutual Fund	-
536845	SFI90D1DD	01-Dec-16		02-Dec-16
536845	SFI90D1DD	01-Dec-16	Redemption of Mutual Fund	02-Dec-16
536843	SFI90D1DR	01-Dec-16		02-Dec-16
536843	SFI90D1DR	01-Dec-16	Redemption of Mutual Fund	02-Dec-16
536844	SFI90D1GD	01-Dec-16	Redemption of Mutual Fund	02-Dec-16
536842	SFI90D1GR	01-Dec-16	Redemption of Mutual Fund	02-Dec-16
532711	SUNILHITEC	01-Dec-16	Bonus issue 1:1	03-Dec-16
532711	SUNILHITEC	01-Dec-16	Stock Split From Rs.10/- to Rs.1/-	03-Dec-16
536977	IPRU2203	05-Dec-16	Redemption of Mutual Fund	-
536978	IPRU2204	05-Dec-16	Redemption of Mutual Fund	-
536979	IPRU8403	05-Dec-16	Redemption of Mutual Fund	-
536980	IPRU8404	05-Dec-16	Redemption of Mutual Fund	-
526109	PRICOL	05-Dec-16	Amalgamation	06-Dec-16
590005	TIDEWATER	06-Dec-16	Interim Dividend - Rs. - 50.0000	07-Dec-16
502355	BALKRISIND	07-Dec-16		08-Dec-16
522292	CHANDNI	08-Dec-16	Consolidation of Shares	09-Dec-16
536928	IPRU2210	08-Dec-16	Redemption of Mutual Fund	-
536929	IPRU2211	08-Dec-16	Redemption of Mutual Fund	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
28-Nov-16	EUR	Business and Consumer Survey (Nov)		106.9	106.3
28-Nov-16	EUR	Business Climate (Nov)			0.6
28-Nov-16	EUR	Consumer Confidence (Nov)		-6	-8
28-Nov-16	EUR	Industrial Sentiment (Nov)		-1	-0.6
28-Nov-16	USD	Dallas Fed Mfg Business Index (Nov)			-1.5
29-Nov-16	JPY	Household Spending (YoY) (Oct)		-0.60%	-2.10%
29-Nov-16	JPY	Unemployment Rate (Oct)		3.00%	3.00%
29-Nov-16	GBP	BoE Consumer Credit (Oct)		1.550B	1.405B
29-Nov-16	GBP	Mortgage Approvals (Oct)		65.50K	62.93K
29-Nov-16	USD	GDP (QoQ) (Q3)		3.00%	2.90%
29-Nov-16	USD	S&P/CS HPI Composite - 20 n.s.a. (YoY) (Sep)		5.20%	5.10%
29-Nov-16	USD	CB Consumer Confidence (Nov)		100	98.6
30-Nov-16	JPY	Industrial Production (MoM) (Oct)		-0.10%	0.60%
30-Nov-16	GBP	GfK Consumer Confidence (Nov)		-4	-3
30-Nov-16	JPY	Housing Starts (YoY) (Oct)		11.20%	10.00%
30-Nov-16	EUR	CPI (YoY) (Nov)		0.60%	0.50%
30-Nov-16	USD	MBA 30-Year Mortgage Rate			4.16%
30-Nov-16	USD	ADP Nonfarm Employment Change (Nov)		160K	147K
30-Nov-16	USD	Personal Income (MoM) (Oct)		0.40%	0.30%
30-Nov-16	USD	Chicago PMI (Nov)		51.8	50.6
30-Nov-16	USD	Pending Home Sales (MoM) (Oct)		1.00%	1.50%
1-Dec-16	JPY	Manufacturing PMI (Nov)			51.1
1-Dec-16	CNY	Manufacturing PMI (Nov)			51.2
1-Dec-16	EUR	Manufacturing PMI (Nov)		53.7	53.7
1-Dec-16	GBP	Manufacturing PMI (Nov)		54.5	54.3
1-Dec-16	EUR	Unemployment Rate (Oct)		10.00%	10.00%
1-Dec-16	USD	Initial Jobless Claims			251K
1-Dec-16	USD	Construction Spending (MoM) (Oct)		0.50%	-0.40%
1-Dec-16	USD	ISM Manufacturing PMI (Nov)		52.1	51.9
2-Dec-16	EUR	PPI (YoY) (Oct)		-1.00%	-1.50%
2-Dec-16	USD	Manufacturing Payrolls (Nov)		4.0K	-9.0K
2-Dec-16	USD	Nonfarm Payrolls (Nov)		174K	161K
2-Dec-16	USD	Unemployment Rate (Nov)		4.90%	4.90%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Nov-16	INR	Federal Fiscal Deficit (Oct)			4,479.88B
30-Nov-16	INR	Infrastructure Output (YoY) (Oct)			5.00%
30-Nov-16	INR	GDP Quarterly (YoY) (Q2)			7.10%
1-Dec-16	INR	Nikkei Market Manufacturing PMI (Nov)			54.4



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