

Wednesday, November 30, 2016

FII Continue the Selling Spree, Nifty To Remain Under Pressure

Indian Market Outlook : Indian benchmark Index Nifty saw a sharp upside rally of 74 points from a low of 8147 to make a high of 8219 in the first half of trading yesterday. In the second half, Nifty corrected from its day's high of 8219 to 8161, a correction of 60 points and finally closed at 8176. This fall was accompanied by sharp rise in the Indian VIX, the fear indicator of the Indian Indices. Nifty has a major resistance at 8287, which the markets are not very likely to breach now. However, Nifty saw a sharp selling from 8219, just 68 points short of the major resistance. This could put some pressure on the markets.

FII have continued their selling spree in the cash market. The net selling for the month of Nov stands at Rs. 19547 Cr, highest one month selling in the year 2016. The NSE Small Cap Index, a good indicator of the broader market, rose by 410 points, 7.57% in last 6 days. However, it corrected yesterday from a major resistance of 5796 to close at 5762. These are the indicators that markets might witness some pressure.

Today we have the OPEC meeting at Vienna, where oil output production cuts would be the major agenda. However, Iran has refused to lower any production. If the meeting fails to conclude on Oil Production levels, we might see markets under pressure.

Nifty Dec Futures is expected to open at 8154 as per SGX Nifty at 8:30 am IST, which is 11 points above its previous close of 8143.

Month	FII Activity
Jan	-14356.01
Feb	-12513.1
Mar	24201.51
Apr	3056.28
May	-186.61
Jun	3957.95
Jul	10121.56
Aug	8778.01
Sep	3329.62
Oct	-5355.76
Nov	-19547

FII Activity for the year 2016

The figures here clearly show that FII have been selling heavily to the tune of Rs. 19547 Cr in the month of November, the largest 1 month selling for the year 2016.

Open Interest Index F&O and Cash Segment Activity

DATES	CASH			Option				Index				NIFTY INDEX			
	FII	DII	FII+DII	FII option	Pro option	COMB BUY/SELL	COMB NET	FII Index	Pro Index	COMB BUY/SELL	COMB NET	O	H	L	C
29-Nov-16	-715.3	534	-181.1	-1807	21776	19969	-336227	10146	-11247	-1101	2357	8132	8197	8129	8142
28-Nov-16	-1436.4	1234	-202.61	-2300	-2563	-4863	-356196	-185	-4125	-4310	3458	8081	8147	8067	8127
25-Nov-16	-372.88	998	624.96	-12627	51948	39321	-351333	10719	-17105	-6386	7768	8008	8122	7977	8114
	EXPIRY TOTAL		241.25	EXPIRY TOTAL		54427		EXPIRY TOTAL		-11797					

In cash segment, last trading day, FII have sold shares worth Rs.715.30 Cr and DII bought shares worth Rs. 534 Cr. A combined sell of Rs. 181.10 Cr. For this expiry, FII and DII together are buyers worth Rs. 241.25 Cr.

In Index Options, last trading day, FII have sold 1807 contracts, below its 1 year average of 18280 contracts. Pro have bought 21776 contracts, below its 1 year average of 27670 contracts. Combined there has been a net bought of 19969 contracts, below its 1 year average of 39000 contracts. For the current expiry, FII and Pro combined are net buyers of 54427 contracts.

In Index Futures, last trading day, FII have bought 10146 contracts, above its 1 year average of 9706 contracts. Pro have sold 11247 contracts, above its 1 year average of 4903 contracts. Combined there has been a net sell of 1101 contracts below its 1 year average of 9401 contracts. For the current expiry, FII and Pro combined are net sellers of 11797 contracts.

Index		Country	1D % Change
Developed Markets			
America	<u>S AND P 500 INDEX</u>	US	0.16
	<u>DJIA INDEX</u>	US	0.17
Europe	<u>DAX INDEX</u>	Germany	0.7
	<u>EURO STOXX 50 INDEX</u>	Eurozone	0.93
	<u>CAC 40 INDEX</u>	Paris	1.19
	<u>FTSE 100 INDEX</u>	London	-0.17
Asia	<u>NIKKEI 225 INDEX</u>	Japan	-0.27
	<u>ASX 200 INDEX</u>	Australia	-0.126
Emerging Markets			
America	<u>BOVESPA INDEX</u>	Brazil	-2.97
Asia	<u>JAKARTA COMPOSITE INDEX</u>	Jakarta	0.432
	<u>HANG SENG INDEX</u>	China	-0.41
	<u>SET INDEX</u>	Thailand	-0.24
	<u>PHILIPPINE STOCK INDEX</u>	Philippine	-0.65
	<u>KOSPI INDEX</u>	Korea	-0.02
	<u>STRAITS TIMES INDEX</u>	Singapore	0.16

Data as on 29th November 2016. The % change is taken from previous day's close.

International Market Morning Update

International markets remain in the uptrend since last few weeks. S&P Futures is trading above 2200 and made a recent high of 2211. German Dax, however, took support of its range low of 10570 after making a low of 10536 to close at 10625 yesterday.

In today's trading Japan's Nikkei is trading Flat. Other Asian peers like Thailand, Malaysia and Indonesia are trading positive today morning.

List of Top Gainers and Losers on 29th Nov 2016

TOP GAINER				TOP LOSER			
SYMBOL	LTP	%CHANGE	SECTOR	SYMBOL	LTP	%CHANGE	SECTOR
RAMCOIND	211.15	10.06	REALTY- HOUSEHOLD	SUDARSCHEM	324.45	-4.49	CHEMICALS
MUTHOOTFIN	310.00	8.58	FINANCIAL SERVICES- NBFC	COSMOFILMS	342.15	-3.52	FMCG- PACKAGING
HIKAL	228.50	7.88	PHARMA	OBEROIRLTY	276.50	-3.22	REALTY
CANFINHOME	1648.00	7.87	FINANCIAL SERVICES- NBFC	RAYMOND	498.60	-2.95	TEXTILES AND APPAREL
SATIN	439.40	7.54	FINANCIAL SERVICES	ADFFOODS	149.30	-2.89	FMCG- FOOD
MANAPPURAM	76.60	5.95	FINANCIAL SERVICES- NBFC	TUBEINVEST	570.85	-2.43	AUTO-AUTO ANCL AND COMPONENTS
BANCOINDIA	192.55	5.83	AUTO-AUTO ANCL AND COMPONENTS	SARDAEN	230.85	-2.33	METALS AND MINING
DEEPAKFERT	194.45	5.14	FERTILISERS	DALMIASUG	121.25	-2.14	FMCG- SUGAR
TIRUMALCHM	757.20	5.00	CHEMICALS	MINDAIND	302.00	-1.96	AUTO- AUTOMOBILES AND AUTO PARTS
IGPL	245.10	4.99	CHEMICALS	UFLEX	280.30	-1.87	FMCG- PACKAGING
BHAGERIA	365.95	4.92	CHEMICALS	JAMNAAUTO	177.45	-1.69	AUTO- AUTOMOBILES AND AUTO PARTS
SONASTEER	60.15	4.88	AUTO-AUTO ANCL AND COMPONENTS	NILKAMAL	1381.50	-1.64	REALTY- HOUSEHOLD
INDIANHUME	823.15	4.22	INFRA- CONSTRUCTION ENGINEERING AND MATERIALS	LOUDHSUG	108.05	-1.59	FMCG- SUGAR
JKCEMENT	737.40	3.93	CEMENT	CHENNPETRO	268.00	-1.47	ENERGY-OIL & GAS
VINATORGA	580.10	3.54	CHEMICALS	ADANITRANS	61.15	-1.45	INFRA- POWER
VLSFINANCE	51.40	3.10	FINANCIAL SERVICES	STCINDIA	115.15	-1.33	DIVERSIFIED
TATASPONGE	552.45	2.82	METALS AND MINING	RBL	970.20	-1.03	AUTO- AUTOMOBILES AND AUTO PARTS
RAIN	51.00	2.72	CEMENT	KIRIINDUS	292.65	-0.93	CHEMICALS
BAJAJELEC	217.40	2.69	REALTY- HOUSEHOLD	VGUARD	170.75	-0.93	REALTY- HOUSEHOLD
BLUESTARCO	475.30	2.56	REALTY- HOUSEHOLD	TNPL	364.70	-0.79	PAPER
SYNGENE	572.35	2.51	PHARMA	FIEMIND	1140.05	-0.78	AUTO-AUTO ANCL AND COMPONENTS
SHRIRAMCIT	1916.75	2.42	FINANCIAL SERVICES- NBFC	KSL	296.15	-0.77	METALS AND MINING
PRAKASH	49.90	2.36	METALS AND MINING	CENTURYPLY	183.70	-0.76	REALTY- HOUSEHOLD
ATUL	2194.65	2.29	CHEMICALS	GHCL	244.50	-0.75	CHEMICALS
SSWL	540.35	2.26	AUTO-AUTO ANCL AND COMPONENTS	SIMPLEXINF	309.00	-0.68	INFRA- CONSTRUCTION ENGINEERING AND MATERIALS
EDELWEISS	102.00	2.26	FINANCIAL SERVICES	IGARASHI	718.00	-0.62	AUTO-AUTO ANCL AND COMPONENTS
KAJARIACER	531.05	2.25	REALTY- HOUSEHOLD	PHILIPCARB	226.00	-0.61	CHEMICALS
CHOLAFIN	981.00	2.10	FINANCIAL SERVICES- NBFC	CENTENKA	283.50	-0.51	TEXTILES AND APPAREL
SUNDRMFAST	299.35	2.08	AUTO-AUTO ANCL AND COMPONENTS	JKTYRE	117.15	-0.50	AUTO- TYRES AND TUBES

Dynamic Sector Performance- 29thNov 2016

SECTOR	% CHANGE TODAY
FMCG- PACKAGING	3.44%
FINANCIAL SERVICES- NBFC	2.25%
TEXTILES AND APPAREL	2.12%
REALTY	1.96%
FERTILISERS	1.93%
INFRA- CONSTRUCTION ENGINEERING AND MATERIALS	1.79%
CEMENT	1.50%
FMCG	1.48%
AUTO- TYRES AND TUBES	1.44%
INFRA- TELECOM	1.44%
JEWELLERY	1.43%
PAPER	1.37%
IT	1.18%
FINANCIAL SERVICES	1.13%
AUTO-AUTO ANCL AND COMPONENTS	1.11%
CHEMICALS	1.06%
REALTY- HOUSEHOLD	1.03%
DIVERSIFIED	0.93%
AUTO- AUTOMOBILES AND AUTO PARTS	0.91%
MEDIA- ENTERTAINMENT	0.89%
INFRA- POWER	0.83%
INFRA- MACHINERY EQUIPMENT	0.83%
TRANSPORTATION LOGISTICS	0.76%
METALS AND MINING	0.66%
ENTERTAINMENT-HOTELS AND LEISURE	0.65%
FMCG- SUGAR	0.60%
PHARMA	0.45%
FMCG- FOOD	0.41%
FOOTWEAR	0.39%
MEDIA	0.33%
BANKS-PRIVATE	0.27%
DEFENCE	0.15%
ENERGY-OIL & GAS	0.02%
BANKS-PSU	-0.01%
FMCG- BREVERAGES	-0.29%
AIRLINES	-0.83%

Stocks near Support

Support Shares							
These stocks were near support on 29th November							
Script	LTP	Support Level		Script	LTP	Support Level	
Large cap stocks				Small & Mid cap stocks			
MCLEODRUSS	148.8	143.8	Month 1 Low	BLUEDART	4530.7	4500	Month 1 Low
INDUSINDBK	1059.95	1025.3	Month 6 Low	COX&KINGS	163	157.6	Month 1 Low
MRF	49350	46200	Month 1 Low	EVEREADY	214.6	211	Month 1 Low
EXIDEIND	178.2	168.45	Month 1 Low	INOXLEISUR	220.15	215.55	Month 1 Low
KTKBANK	103.85	98.6	Month 7 Low	HTMEDIA	71.6	69.65	Month 3 Low
CASTROLIND	401.85	379	Month 4 Low	3MINDIA	11300	10974	Month 1 Low
CONCOR	1167.55	1120.4	Month 1 Low	RADICO	116.85	110.35	Month 1 Low
BHEL	129.2	122.5	Month 1 Low	LAOPALA	523.55	500.1	Month 1 Low
MARUTI	5088.15	4765.3	Month 1 Low	JKTYRE	117.2	109.8	Month 1 Low
JUBLFOOD	925.2	827.25	Month 1 Low	MONSANTO	2270.8	2190.8	Month 5 Low

Results Calendar

SYMBOL	RESULT DATE	SYMBOL	RESULT DATE
MANINFRA	30-Nov	A2ZINFRA	1-Dec
PUNJLLOYD	30-Nov	INDIAGLYCO	2-Dec
RATNAMANI	30-Nov	ASHOKA	2-Dec
BALKRISIND	30-Nov	IL&FSTRANS	2-Dec
GILLETTE	1-Dec	TVTODAY	2-Dec
SRIPIPES	1-Dec	BGREENERGY	2-Dec
GSPL	1-Dec	DREDGECORP	2-Dec
DBL	1-Dec		

Disclaimer

The investment advice or guidance provided by way of recommendations, reports or other ways are solely the personal views of the research team. Users are advised to use the data for the purpose of information and rely on their own judgment while making investment decision.

Dynamic Equities Pvt. Ltd - SEBI Investment Advisory Reg. No.: INA300002022

Disclosure

Dynamic Equities Pvt. Ltd. is a member of NSE, BSE, MCX SX and a DP with NSDL & CDSL. It is also engaged in Investment Advisory Services and Portfolio Management Services. Dynamic Commodities Pvt. Ltd., associate company, is a member of MCX & NCDEX. We declare that our activities were neither suspended nor we have defaulted with any stock exchange authority with whom we are registered. SEBI, Exchanges and Depositories have conducted the routine inspection and based on their observations have issued advise letters or levied minor penalty on for certain operational deviations.

Answers to the Best of our knowledge and belief of Dynamic/ its Associates/ Research Analyst: DYNAMIC/its Associates/ Research Analyst/ his Relative:

- Do not have any financial interest / any actual/beneficial ownership in the subject company.
- Do not have any other material conflict of interest at the time of publication of the research report
- Have not received any compensation from the subject company in the past twelve months
- Have not managed or co-managed public offering of securities for the subject company.
- Have not received any compensation for brokerage services or any products / services or any compensation or other benefits from the subject company, nor engaged in market making activity for the subject company
- Have not served as an officer, director or employee of the subject company

Report Prepared By:

Mayank Jain - NISM-201500086427

Vikash Kandoi - NISM-201500086430