

Morning Notes

30-Nov-2015

MARKET OUTLOOK

Markets to make a cautious start of the crucial week: The Indian markets extended their rally in last session, today the start of the data heavy crucial week is likely to be cautious. Traders apart from key macro data will be eyeing the development in the Parliament with the serious business taking place from today.

EQUITY MARKET WRAP UP

Benchmarks start new series in style; Sensex regains 26,100 mark: Indian equity benchmarks started the December F&O series on optimistic note, with key gauges rallying over half a percentage point and breaking lots of psychological levels in their northward rally. Markets traded with traction for most part of the day's trade despite some profit booking in noon deals as weakness in rupee weighed on the sentiments. BSE Sensex surged by 169.57 points or 0.65% to 26128.20, while the CNX Nifty soared by 58.90 points or 0.75% to 7942.70. The BSE Sensex touched a high and a low 26184.65 and 25937.32, respectively. The BSE Mid cap index was up by 0.46%, while Small cap index was up by 0.32%.

DEBT MARKET & FOREX

- **Bond yields trade flat on Friday:** Bond yields traded flat on Friday ahead of the RBI monetary policy due on December 1, 2015. Besides, investors are closely monitoring the proceedings of the winter session of Parliament and eyeing the passage of the crucial GST bill. Yields on new 10 year Government Stock were trading flat from its previous close at 7.72% on Thursday. The benchmark five-year interest rates were trading flat from its previous close at 7.79% on Thursday.
- **Rupee ends weaker on Friday on month end dollar demand:** Indian rupee extending its weakness for the second straight day declined on Friday due to persistent month end demand for the American currency by banks and importers. Besides, gains in the local equity market didn't support the rupee, while the dollar's strength against other currencies overseas kept pressure on the domestic currency. Rupee ended at 66.76, 19 paise weaker from its previous close of 66.57 on Thursday. The currency touched a high and low of 66.89 and 66.65 respectively.

ECONOMY & MARKET PULSE

- PM willing to talk to everyone to get the indirect tax law through: Jaitley
- India likely to displace UK and be largest aviation market by 2026: IATA
- Govt approves investment of Rs 3,120 crore for infrastructure in 102 AMRUT cities
- RBI relaxes norms for imports of aircraft, helicopter
- FAME-India scheme will save Rs 60,000 cr on the oil import bill by 2020: Anant Geete

Indices Performance

Index	27-Nov-15	Previous Close	% Change*
S&P BSE Sensex	26,128.20	25,958.63	0.65%
CNX Nifty	7,942.70	7,883.80	0.75%
CNX Midcap	13,228.25	13,180.90	0.36%
CNX 500	6,686.90	6,644.90	0.63%
S&P BSE Smallcap	11,545.84	11,508.83	0.32%

Global Markets

Index		Previous Close	% Change*
Dow Jones	17,798.49	17,813.39	-0.08%
Nasdaq	5,127.52	5,116.14	0.22%
S&P 500	2,090.11	2,088.87	0.06%
FTSE	6,375.15	6,393.13	-0.28%
CAC	4,930.14	4,946.02	-0.32%

Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	3,257.53	3,768.96	-511.43
DII Flows	3,343.24	2,394.26	948.98

Commodity Market

Commodities (INR)		Gains+Loss	% Change*
Gold (10gm)	25,059.00	-222.00	-0.88%
Silver (1Kg)	33,701.00	-380.00	-1.11%
Crude Oil (1 barrel)	2,821.00	-30.00	-1.05%
Aluminium (1 Kg)	98.45	-3.35	-3.29%
Copper (1Kg)	310.80	-2.75	-0.88%

Currency Market

Currency	27-Nov-15	Gains+Loss	% Change*
INR / 1 USD	66.7503	0.20	0.30%
INR / 1 GBP	100.6795	0.03	0.03%
INR / 1 EURO	70.8755	0.18	0.25%
INR / 100 JPY	54.5300	0.23	0.42%

NSE Top 5 Gainers

Company	27-Nov-15	Previous Close	% Change*
Antarctica	0.20	0.15	33.33%
Sujana Towers	11.45	9.55	19.90%
Hanung Toys & Text	8.85	7.40	19.59%
Megasoft	6.50	5.45	19.27%
Websoft Energy System	29.90	25.15	18.89%

NSE Top 5 Losers

Company	27-Nov-15	Previous Close	% Change*
Birla Cotsyn (India)	0.05	0.10	-50.00%
VKS Projects	0.05	0.10	-50.00%
Pan India Corp.	0.15	0.20	-25.00%
Nakoda	0.20	0.25	-20.00%
Tree House Education	168.60	210.70	-19.98%

BSE Top 5 Gainer

Company	27-Nov-15	Previous Close	% Change*
DFM Foods	709.50	591.25	20.00%
Hanung Toys & Text	8.88	7.40	20.00%
Sujana Towers	11.58	9.65	20.00%
National Plastic Ind	52.30	43.60	19.95%
Megasoft	6.40	5.34	19.85%

BSE Top 5 Loser

Company	27-Nov-15	Previous Close	% Change*
Tree House Education	169.00	211.20	-19.98%
Chambal Breweries	13.45	16.80	-19.94%
Sudar Industries	3.54	4.36	-18.81%
Oasis Securities	29.55	34.40	-14.10%
Omega Ag-Seeds	8.46	9.77	-13.41%

* % change is the over the previous days close.