

US markets and European markets decline

- US stocks fell, pulling the Dow Jones Industrial Average down from a 13-month high, as smaller- than-forecast growth in personal spending spurred concern that consumers are struggling to recover from the recession. The Dow Jones, S&P 500 and NASDAQ lost 0.16%, 0.05% and 0.37%, respectively. Financial shares led declines, with JPMorgan Chase & Co. and Bank of America Corp. dropping at least 1.2%, after the Federal Deposit Insurance Corp. said the number of "problem" lenders climbed to a 16-year high. Hewlett-Packard Co. slid 1.6% after reporting a drop in personal-computer sales.
- The benchmark FTSE 100 dropped as a retreat in metals prices weighed on raw-material producers. The FTSE 100 Index lost 31.54 points, or 0.59%, at 5,323.96. Rio Tinto Group and Vedanta Resources Plc lost at least 2.7% as copper decreased on the London Metal Exchange. Aquarius Platinum Ltd. slid 5.8% after saying it will offer USD 250 mn of convertible bonds due in 2015.

Index	Latest	1D Chg	YTD
Sensex (24-Nov-09)	17,131.08	(0.29)%	77.57%
Nifty (24-Nov-09)	5,090.55	(0.25)%	72.03%
Nasdaq (24-Nov-09)	1,786.25	(0.37)%	47.42%
DJIA (24-Nov-09)	10,433.71	(0.16)%	18.88%
S&P 500 (24-Nov-09)	1,105.66	(0.05)%	22.41%
FTSE 100 (24-Nov-09)	5,323.96	(0.59)%	20.07%
CAC 40 (24-Nov-09)	3,784.62	(0.75)%	17.61%
Nikkei 225 (24-Nov-09)	9,401.58	(1.01)%	6.12%
Hang Seng (24-Nov-09)	22,423.14	(1.53)%	55.85%

SENSEX

Top Gainers	Close	1DGain
Maruti Suzuki	1,599.40	2.65%
M&M	1,067.45	2.42%
Bharti Airtel	282.00	2.25%

Top Losers	Close	1DLoss
Tata Steel	557.40	(2.76)%
Rel Infra	1,069.25	(2.27)%
Sterlite Industries	263.65	(2.04)%

NIFTY

Top Gainers	Close	1DGain
Bharti Airtel	282.30	2.56%
Maruti Suzuki	1,600.00	2.55%
BPCL	540.00	2.44%

Top Losers	Close	1DLoss
Jindal Steel	700.00	(2.92)%
Tata Steel	557.00	(2.80)%
IDFC	168.00	(2.75)%

Sectors	Close	1DGain/(Loss)
Auto	7,055.84	1.45%
Consumer Durables	3,525.57	1.40%
FMCG	2,886.87	(0.92)%
Metal	16,216.72	(0.81)%

Market Stats	BSE	NSE
Advance-Decline ratio	1.00	0.88
Volume (in'000)	357,300	717,012

Sensex ends flat amid volatility

Replicating positive cues from the global markets, Sensex opened on a positive note with a marginal positive gap of 50.68 points at 17,230.86. However, as the morning session progressed the gauge pared most of its early gains and traded range-bound with negative bias owing to selling pressure in the index heavyweights. Thereafter, in the early afternoon session the gauge weakened further and touched the intraday low of 17,027.52 owing to a sudden fall in the Shanghai Composite Index after it slipped more than 3% and the weak US index futures weighed on sentiments. Nonetheless, in the late afternoon session the market cut some of its losses owing to fresh buying support in the index heavyweights. Thereafter, the bourse oscillated in a narrow range in the last session of trade owing to the weak European markets that weighed on investor sentiments. The Sensex finally ended the volatile session flat at 17,131.08 after a loss of 49.10 points or 0.29%.

The Nifty closed the session at 5090.55 after a marginal loss of 13 points or 0.25%.

Commodities Market

Crude oil traded around USD 77 a barrel before a report forecast to show that higher-than-normal crude inventories grew last week in the US. Gold rose on speculation that the dollar may fall further and central banks and investors will buy more bullion. Copper prices fell as the dollar steadied.

SENSEX

Open: 17,230.86; Close: 17,131.08;
Prv. Close: 17,181.18



Dow Jones

Open: 10,451.25; Close: 10,433.71;
Prv. Close: 10,450.95



FTSE 100

Open: 5,334.21; Close: 5,323.96;
Prv. Close: 5,355.50



International News

Headlines:



Most Active Stocks by Value (in Cr)

BSE	Close	%Chg	Value	Volume
RIL	2,176.10	(0.88)%	153	701,100
SBI	2,304.60	(0.69)%	146	629,174
Tata Steel	557.40	(2.76)%	138	2,437,799
JSW Steel	998.95	2.93%	136	1,369,433
Den Network	163.10	(0.16)%	124	7,730,791

NSE	Close	%Chg	Value	Volume
RIL	2,176.50	(0.84)%	756	3,472,510
Tata Steel	557.00	(2.80)%	606	10,712,390
SBI	2,298.20	(0.94)%	539	2,324,916
JSW Steel	993.00	2.21%	460	4,617,908
ICICI	905.00	(1.34)%	440	4,850,031

Most Active Calls by Contract Value (in Cr)

	Value	Price	% Chg
Nifty 5100 Call Nov-09	7,503	25.00	(46.12)%
Nifty 5000 Call Nov-09	2,877	82.50	(31.71)%

Most Active Puts by Contract Value (in Cr)

	Value	Price	% Chg
Nifty 5100 Put Nov-09	6,482	47.00	23.52%
Nifty 5000 Put Nov-09	5,228	14.70	(3.61)%

Most Active Future Contracts by Value (in Cr)

	Value	Price	% Chg
NIFTY Nov-09	13,860	5,073.00	(0.69)%
NIFTY Dec-09	5,460	5,080.20	(0.72)%

Top Contracts by Change in Open Interest

Contract	Change in OI	Price	% Chg
IDEA Dec-09	11,477,700	49.30	0.10%
UNITECH Dec-09	9,873,000	80.00	(1.17)%

Fill open positions in Derivatives (NSE)

	Idx Fut	Ind Opt	Stk Fut	Stk Opt
No of Contracts	870,315	1,464,845	887,818	66,645
Amt (in cr.)	21,825	37,144	29,898	2,235

Fills (Rs. Cr.)*	24-Nov-09	MTD	YTD
Equity inflows	2,351	39,612	528,546
Equity outflows	2,182	36,901	507,652
Net	170	2,711	20,894

DII's (Rs. Cr.)*	24-Nov-09	MTD	YTD
Equity inflows	1,211	21,340	275,880
Equity outflows	1,358	20,409	251,166
Net	(147)	930	24,714

* Fill & DII data is provisional in nature

Commodities	Latest	1DChg
Crude (USD/bbl) (Nov 24, 2009)	77.43	(0.17)%
Gold (USD/oz) (Nov 24, 2009)	1165.80	0.09%
Cu (USD/lb) (Nov 24, 2009)	3.14	(0.59)%

X-rate	24-Nov-09	1DChg	1MChg
USD/Rs.	46.6	0.24%	0.32%
GBP/Rs.	77.2	0.34%	(0.09)%
EUR/Rs.	69.6	0.20%	(0.17)%
JPY/Rs.	52.5	0.29%	3.82%

ADR/GDR (USD)	24-Nov-09	1DChg
Dr Reddy's	24.04	(0.33)%
HDFC Bank	134.38	(1.04)%
ICICI Bank	37.84	(2.67)%
Infosys	51.79	(0.10)%
Wipro	20.60	(0.15)%
Tata Communications	16.20	2.27%
Tata Motors	13.82	0.36%
MTNL	3.18	(1.24)%
Patni	20.45	0.15%
Sterlite	18.22	(1.51)%

Macro Economic Indicators	
GDP Growth*	6.70%
Inflation (for the month of October, 2009)	1.34%
Index of Industrial Production (IIP) growth (September)	9.10%
CRR (Nov 24, 2009)	5.00%
SLR (Nov 24, 2009)	25.00%

* As per CSO Estimate for 2008-09

- The US economy expanded less than initially estimated last quarter as consumer spending trailed forecasts. Gross domestic product grew at a 2.8% annual pace, the Commerce Department said, compared with its prior estimate of 3.5%. (Bloomberg)
- Federal Reserve officials said record-low interest rates might fuel "excessive" speculation in financial markets and possibly dislodge expectations for low inflation, according to minutes of their meeting. (Bloomberg)
- Home prices in 20 US cities rose for a fourth straight month in September. The S&P/Case-Shiller home-price index increased 0.27% from the prior month on a seasonally adjusted basis, after a 1.13% rise in August. (Bloomberg)

Corporate Announcements – India:

- Bharat Heavy Electricals Limited** has bagged a Rs. 56.00 bn contract from an arm of Jaiprakash Associates for setting up a 1,980-Mw thermal power plant in Uttar Pradesh. (BS)
- Indian Oil Corporation** will set up a Rs. 100.00 bn nuclear power plant in association with Nuclear Power Corp of India. (BS)
- Reliance Industries** has reopened about two-thirds of its 1,432 petrol pumps in the country and is selling about 2,000 kilolitres of auto fuel per day, RIL President (Refinery Business) P Raghavendran said. (BS)

Economic and Political Headlines:

- The Finance Ministry has set up a working group for suggesting changes in the existing policy on foreign capital inflows by FIIs, NRIs and venture capital funds. The 16-member group will be headed by UTI MF CMD U K Sinha, will also review the current arrangements relating to participatory notes- instruments through which unregistered foreign entities invest in Indian stock markets. (BS)
- Pending revision of guidelines for setting up special economic zones, the government will continue to approve proposals for new SEZs which would be developed in an environmentally sustainable way. The government would consider fresh applications for SEZs on December 15. (BS)

BSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
ANKUSH FINSTOCK	BHARAT MANUBHAI SHAH	SELL	114,549	5.12
FILATEX FASH	KALPANA SONU PADYAL	SELL	53,088	15.55
GANGOTRI IRON	GBK RESOURCES PVT LTD	SELL	118,000	35.16
GSB FINANCE	GSB SECURITIES PVT LTD	SELL	50,000	9.75
GSB FINANCE	SUSHMA GIRDHARI BIYANI	BUY	51,410	9.75
INDO BORAX	SAINATH HERBAL CARE MARKETING P.LTD	BUY	52,000	76.06
KAY POWER	B.S.KHANDELWAL	BUY	200,000	8.92
KAY POWER	KAUSHALYA GARG	BUY	427,250	9.06
KAY POWER	KAUSHALYA GARG	SELL	486,909	8.93
KAY POWER	VIJAY KUMAR GOYAL	BUY	100,000	8.93
KAY POWER	VIJAY KUMAR GOYAL	SELL	150,000	9.19
KIRLOSKAR PNEU	PRATIMA SANJAY KIRLOSKAR	SELL	72,012	402.44
MAHALAXMI RUB	RUSHAB RAVJI PATEL	BUY	59,402	79.75
OMKAR OVERSEAS	ARCHANADEVI SATYANARAIN AGARWAL	SELL	55,000	45.85
OMKAR OVERSEAS	PATHIK NAYANBHAI SHAH	BUY	100,000	45.84
PODDAR PIGM	PODDAR PIGMENTS LTD BUY BACKX	BUY	63,600	36.53
RADHE DEV	JAYENDRA THAKKAR JASMINE	SELL	1,700,000	8.33
RAMCO SYSTEMS	HITESH SHASHIKANT JHAVERI	BUY	115,331	116.72
RAMCO SYSTEMS	PLATINUM ASSET MANAGEMENT LIMITED A/C PLATINUM UNHEDGED FUND	SELL	190,013	111.63
TRICOM INDIA	SUNIL ROSHANLAL BEHKI	BUY	348,902	18.59

Note: Bulk Deals over and above 50,000 shares are only considered

NSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
DCMFINSERV	AMAZING CAPITAL SERVICES PRIVATE LIMITED	SELL	200,000	4.90
DCMFINSERV	VINTAGE LEARNING PVT LTD	BUY	200,000	4.9
GLOBUSSPR	RATNABALI CAPITAL MARKETS LTD.	BUY	160,000	90.08
GLOBUSSPR	RATNABALI CAPITAL MARKETS LTD.	SELL	155,000	90.97
JINDALPOLY	JINDAL POLY FILMS LIMITED	BUY	356,576	320.1
JINDALPOLY	SAIF II MAURITIUS COMPANY LTD	SELL	350,000	320.10
RAMCOSYS	PLATINUM INVESTMENT MANAGEMENT LIMITED A/C	SELL	250,000	107.45
TODAYS	PLATINUM UNHEDGE	SELL	85,000	24.59
TRICOM	YES BANK	SELL	85,000	24.59
TRICOM	BEHKI SUNIL ROSHANLAL	BUY	365,483	18.71
TRICOM	BEHKI SUNIL ROSHANLAL	SELL	275,947	18.87
UFLEX	DILIPKUMAR B. LAKHI	BUY	1,916,290	88

Note: Bulk Deals over and above 50,000 shares are only considered

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