

US markets and European markets decline

- US stocks slipped, pulling the Standard & Poor's 500 Index down from a 13-month high, as technology companies slid after profit forecasts at Autodesk Inc. and Salesforce.com Inc. trailed some analyst estimates. The Dow Jones, S&P 500 and NASDAQ fell 0.11%, 0.05% and 0.58%, respectively. Autodesk, the biggest maker of engineering-design software, slid 10% after saying job losses in core markets are making the company's recovery "challenging. The market's decline was limited as Bank of America Corp. rallied after John Paulson's hedge fund said the shares may almost double.
- The benchmark FTSE 100 ended the session little changed after Marks & Spencer Group Plc and ITV Plc were boosted by new appointments and mining shares rallied, overshadowing an unexpected drop in U.S. housing starts.. The FTSE 100 Index slid 3.80 points, or 0.07%, at 5,342.13. Marks & Spencer surged 5.9% as the UK's biggest clothing retailer named Marc Bolland as chief executive officer, while ITV Plc climbed after unveiling Archie Norman as chairman. Xstrata Plc led a rally in raw- material producers as metals prices gained

Index	Latest	1D Chg	YTD
Sensex (18-Nov-09)	16,998.78	(0.30)%	76.20%
Nifty (18-Nov-09)	5,054.70	(0.15)%	70.82%
Nasdaq (18-Nov-09)	1,801.74	(0.58)%	48.70%
DJIA (18-Nov-09)	10,426.31	(0.11)%	18.80%
S&P 500 (18-Nov-09)	1,109.80	(0.05)%	22.87%
FTSE 100 (18-Nov-09)	5,342.13	(0.07)%	20.48%
CAC 40 (18-Nov-09)	3,828.16	(0.02)%	18.96%
Nikkei 225 (18-Nov-09)	9,676.80	(0.55)%	9.22%
Hang Seng (18-Nov-09)	22,840.33	(0.32)%	58.75%

SENSEX

Top Gainers	Close	1D Gain
Tata Motors	646.20	3.14%
Tata Steel	546.90	1.68%
ITC	258.70	1.61%

Top Losers	Close	1D Loss
Rel Infra	1,150.10	(3.20)%
L&T	1,627.70	(1.72)%
ICICI Bank	905.25	(1.47)%

NIFTY

Top Gainers	Close	1D Gain
IDFC	177.45	3.98%
Tata Motors	646.30	3.15%
Jindal Steel	728.40	2.98%

Top Losers	Close	1D Loss
Rel Infra	1,143.80	(3.79)%
Sun Pharmaceuticals	1,432.00	(1.97)%
ICICI Bank	903.00	(1.91)%

Sectors	Close	1D Gain/(Loss)
Metal	16,165.23	1.20%
FMCG	2,846.86	0.73%
Oil & Gas	10,120.56	(0.84)%
Bankex	10,256.61	(0.78)%

Market Stats	BSE	NSE
Advance-Decline ratio	1.37	1.32
Volume (in'000)	404,900	736,033

Sensex settles below the 17,000 mark

Replicating mixed cues from the global markets, the Sensex opened on a cautious note at 17,032.01 with a marginal negative gap of 18.64 points. However, the gauge soon recovered and traded range-bound with positive bias for better part of the morning session owing to a strong dollar that helped the IT and Technology stocks move up. Nonetheless, in the early afternoon session the gauge weakened and hovered around the day's unchanged mark owing to lack of positive triggers. In the late afternoon session, the measure weakened further owing to weak Oil & Gas and Capital Goods. Subsequently, in the last session of trade, the measure touched the intraday low of 16,958.41 as index heavyweights seemed to extend the fall earlier in the day. Finally, the Sensex ended below the 17,000 mark at 16,998.78 after making a loss of 51.87 points or 0.30%.

The Nifty ended the session at 5,054.70 after making a loss of 7.55 points or 0.15%.

Commodities Market

Crude oil rose after the government reported that US crude and fuel supplies dropped along with refinery production and imports. Gold climbed to a record as investors bought precious metals as an alternative to holding weaker dollars. Copper rallied to the highest level in 14 months as the dollar's decline boosted the appeal of raw materials as alternative investments.

SENSEX

Open: 17,032.01; Close: 16,998.78;
Prv. Close: 17,050.65



Dow Jones

Open: 10,426.27; Close: 10,426.31;
Prv. Close: 10,437.42



FTSE 100

Open: 5,348.21; Close: 5,342.13;
Prv. Close: 5,345.93



International News

Headlines:



Most Active Stocks by Value (in Cr)				
BSE	Close	%Chg	Value	Volume
Reliance Capital	908.25	1.59%	276	3,036,810
JSW Steel	965.65	4.03%	196	2,018,267
RIL	2,102.45	(1.47)%	179	846,990
Tata Steel	546.90	1.68%	141	2,594,087
DLF	380.35	0.67%	109	2,873,593
NSE	Close	%Chg	Value	Volume
RIL	2,101.00	(1.47)%	825	3,907,563
Reliance Capital	908.00	1.58%	735	8,087,305
JSW Steel	960.00	3.51%	597	6,170,816
Tata Steel	546.00	1.34%	524	9,652,594
DLF	379.50	0.66%	394	10,356,832

Most Active Calls by Contract Value (in Cr)			
	Value	Price	% Chg
Nifty 5100 Call Nov-09	4,644	41.25	(19.43)%
Nifty 5000 Call Nov-09	3,837	96.00	(9.69)%
Most Active Puts by Contract Value (in Cr)			
Nifty 5000 Put Nov-09	4,991	44.00	(0.56)%
Nifty 4900 Put Nov-09	3,233	21.55	0.23%
Most Active Future Contracts by Value (in Cr)			
NIFTY Nov-09	10,128	5,057.00	(0.13)%
BANKNIFTY Nov-09	1,001	9,220.00	(0.80)%

Top Contracts by Change in Open Interest			
Contract	Change in OI	Price	% Chg
GMRINFRA Dec-09	4,700,000	67.40	(1.10)%
HINDUNILVR Dec-09	3,420,000	276.20	0.24%

Fill open positions in Derivatives (NSE)				
	Idx Fut	Ind Opt	Stk Fut	Stk Opt
No of Contracts	582,973	59,228	1,282,405	2,446,411
Amt (in cr.)	20,366	2,013	32,034	67,323

FII's (Rs. Cr.)*			
	18-Nov-09	MTD	YTD
Equity inflows	2,597	31,253	520,187
Equity outflows	2,185	27,620	498,371
Net	412	3,633	21,816
DII's (Rs. Cr.)*			
	18-Nov-09	MTD	YTD
Equity inflows	1,091	16,387	270,927
Equity outflows	1,348	15,577	246,334
Net	(257)	810	24,593

* FII & DII data is provisional in nature

Commodities		
	Latest	1DChg
Crude (USD/bbl) (Nov 18, 2009)	79.58	0.56%
Gold (USD/oz) (Nov 18, 2009)	1141.20	0.16%
Cu (USD/lb) (Nov 18, 2009)	3.16	0.70%

X-rate			
	18-Nov-09	1DChg	1MChg
USD/Rs.	46.3	0.02%	(0.02)%
GBP/Rs.	77.8	0.02%	3.10%
EUR/Rs.	68.9	(0.30)%	(0.12)%
JPY/Rs.	51.9	(0.08)%	1.93%

ADR/GDR (USD)		
	18-Nov-09	1DChg
Dr Reddy's	23.97	(1.36)%
HDFC Bank	134.00	(1.92)%
ICICI Bank	38.81	(2.22)%
Infosys	52.05	(0.99)%
Wipro	20.50	0.49%
Tata Communications	15.99	0.38%
Tata Motors	13.99	0.94%
MTNL	3.31	(1.19)%
Patni	20.90	0.38%
Sterlite	18.79	(0.32)%

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 18, 2009)	5.00%
SLR (Nov 18, 2009)	25.00%

* As per CSO Estimate for 2008-09

Residential construction in the US unexpectedly dropped in October amid concern a homebuyer tax credit would expire. Builders broke ground on 529,000 houses at an annual pace, down 11% from the prior month and the fewest since April's record low, Commerce Department figures showed in Washington. (Bloomberg)

The cost of living in the US rose more than forecast in October as Americans paid more for fuel, while so-called core prices held at a pace that supports the Federal Reserve's forecast for tame inflation. The 0.3% rise in the consumer-price index followed a 0.2% increase in September, figures from the Labor Department showed in Washington. Excluding food and energy costs, the core index rose 0.2% for a second month. (Bloomberg)

Treasury Secretary Timothy Geithner urged US banks to boost lending to small businesses and consumers who still face "very challenging" credit conditions and rising unemployment. (Bloomberg)

Corporate Announcements – India:

Aban Offshore has raised Rs. 6.97 bn through private placement of shares with qualified institutional buyers. (BS)

Pratibha Industries has bagged an order worth Rs. 2.94 bn from UP Jal Nigam. The scope of work includes installation of water treatment plant, overhead tank and laying and commissioning of distribution system. The project is to be executed in 24 months including four months trial run. (BS)

Petronet LNG is keen to acquire up to 10% stake in ONGC Petro-additions (OPaL), the special purpose vehicle formed for setting up a chemical complex at Dahej SEZ. (BS)

Economic and Political Headlines:

The government said record investments in the equities market by foreign investors was not a matter of concern, but it would act if it finds any distortions. Foreign institutional investors have put in a record over Rs. 719.00 bn in the equities market so far this year and have driven up valuation of the rupee against the dollar, hurting exporters already hit by slowdown in the West. (BS)

BSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
ARVIND CHEM	NEHA GYANESHWAR SHARMA	SELL	102,637	55.88
CAT TECH	VINOD AMRATLAL NAAI	BUY	405,100	12.40
CAT TECH	VINOD AMRATLAL NAAI	SELL	289,216	12.33
GOLDSTONE TECH	PREM MOHANLAL PARIKH	BUY	150,000	27.38
GREYCELLS ENTER	I G E INDIA LTD	SELL	136,425	55.11
GREYCELLS ENTER	SAFE ENTERPRISES	BUY	100,000	57.30
GSB FINANCE	GSB SECURITIES PVT LTD	SELL	50,000	8.75
GSB FINANCE	NEELAM RAMAKANT BIYANI	BUY	50,000	8.75
GTECH INFO	CHANDRAKANT B SHAH	SELL	897,200	2.02
GTECH INFO	KAUSHIK GANGARAM RATHOD	SELL	781,200	2.03
HBL POWER	UTI INVEST ADVISORY SERV LTD A/C ASCENT INDIA FUND	SELL	131,410	410.00
INDIABULLS RETL	JM FINANCIAL SERVICES PVT LTD	SELL	113,191	33.59
INDTRADECO	ARYAMAN BROKING LIMITED	BUY	5,000,000	0.40
INDTRADECO	KRUNAL INDUSTRIAL ESTATE DEVELOPERS PRIVATE LIMITED	SELL	4,038,850	0.40
INDTRADECO	VARSHA INDL TOWNSHIP ORGANISERS PVT LTD.	SELL	961,150	0.40
KALINDI RAIL	AMIF I LTD	SELL	160,000	158.26
KAY POWER	VISHAL PIPES LTD	BUY	100,000	7.63
KOHINOOR BROAD	VINOD AMRATLAL NAAI	BUY	707,731	6.20
KOHINOOR BROAD	VINOD AMRATLAL NAAI	SELL	721,738	6.22
KUSHAGRA SOFT	ALKEN MANAGEMENT & FINANCIAL S	SELL	100,000	11.08
MAHARASHTRA SEAM	CONCORD TREXIM PRIVATE LIMITED	BUY	350,000	364.50
MAHARASHTRA SEAM	G V N FUELS LIMITED	SELL	350,000	364.50
MAHARASHTRA SEAM	JHANJHARI HOLDINGS PVTLTD	SELL	350,000	364.00
MAHARASHTRA SEAM	STABLE TRADING CO.LTD.	BUY	350,000	364.00
PFL INFOTECH	GB TRADING & INVESTMENTS (P) LTD.	SELL	278,000	12.36
PFL INFOTECH	ISHITA MOHATTA	BUY	50,000	12.36
PFL INFOTECH	PRIME INVEST INFO INVEST LTD.	SELL	100,000	12.36
PFL INFOTECH	SARITA PASARI	BUY	50,000	12.36
PRAJAY ENGR	ANGEL INFIN PRIVATE LIMITED	BUY	298,109	32.48
REDINGTON INDIA	INDIA CAPITAL FUND LTD.	BUY	1,391,598	310.00

REDINGTON INDIA	INDIA MAN FUND MAURITIUS LIMITED	SELL	1,700,000	310.01
REGENCY TRUST	SUNIL KAJARIA	SELL	110,000	11.25
RIBA TEXTILES	NITA BANKESH BHAVSAR	SELL	126,000	19.05
Rishabhdev Technocl	ARIHANT SEC & INVESTMENT	BUY	145,206	19.70
Rishabhdev Technocl	ARIHANT SEC & INVESTMENT	SELL	98,206	19.15
SAPAN CHEM	J GEETHALAKSHMI	SELL	61,000	3.00
SAPAN CHEM	PUSHPABEN SURESHKUMAR	BUY	60,000	3.00
SOFTSOL INDIA	KRISHNA CHANDAKKINENI	SELL	169,699	55.00
SOFTSOL INDIA	SOFTSOL INDIA LTD	BUY	170,056	55.00
TANEJA AERO	RAJ KUMAR LOHIA HUF	BUY	130,000	37.14
Tata Motors DVRA Ordy	JM FINANCIAL SERVICES PVT LTD	BUY	650,000	500.00
Tata Motors DVRA Ordy	TATA SONS LTD	SELL	1,200,000	500.00
TOURISM FIN CORP	SUNIL ROSHANLAL BEHKI	BUY	589,041	26.68
TOURISM FIN CORP	SUNIL ROSHANLAL BEHKI	SELL	518,537	26.40
UTV SOFTWARE	RELIANCE MUTUAL FUND	SELL	150,000	450.00
VISHAL RETL	Naman Securities & Finance Pvt. Ltd.	BUY	120,911	66.02

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

NSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
KALINDEE	AMIF I LTD	SELL	440,000	158.55
LOKESHMACH	KETAN BHUPENDRAKUMAR SHAH	BUY	60,490	45.97
LOKESHMACH	LOKESHWAR RAO MULAPUDI	SELL	150,000	45.91
MIRZAI NT	CALEDONIA INVESTMENTS PLC	SELL	505,621	15.12
MURUDCERA	MANJULA JAYANTILAL JAIN	SELL	92,154	44.45
PRAENG	ANGEL INFIN PRIVATE LIMITED	BUY	618,213	32.75
PRAENG	ANGEL INFIN PRIVATE LIMITED	SELL	468,631	32.54
PRAENG	SETU SECURITIES LTD	BUY	219,140	32.75
PRAENG	SETU SECURITIES LTD	SELL	95,962	32.95
RAMSARUP	ASHISH JHUNJHUNWALA	SELL	125,000	87.00
RAMSARUP	SILVER STALLION LIMITED	BUY	125,000	87.00
TATAMTRDVR	TATA STEEL LIMITED	SELL	676,122	490.01

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

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