

# DAILY | FUNDAMENTAL



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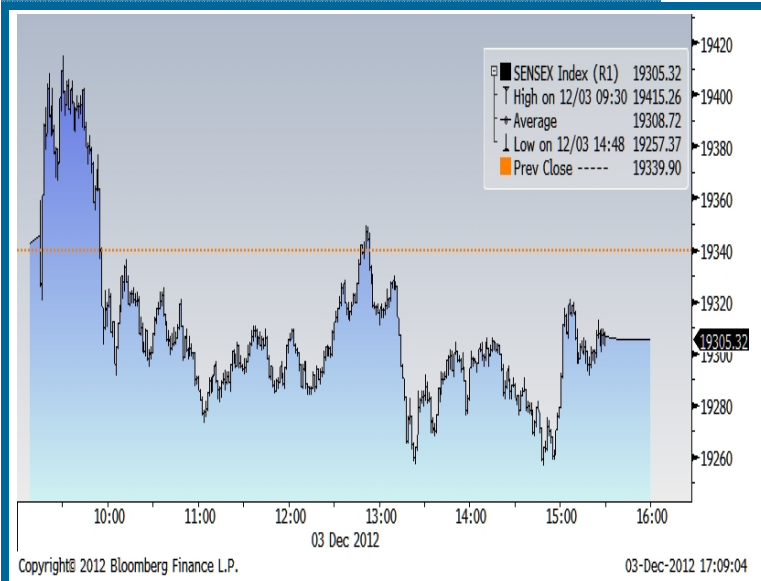
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# MARKET UPDATE

## INTRA DAY CHART OF SENSEX



Indian equities settled flat on Monday with negative bias. Banking, FMCG and technology witnessed a fall. However, realty gained the most followed by metal and power.

Nifty closed at 5870.95 down by 8.90 points or 0.15 percent over the previous day closing of 5727.45 after witnessing a low of 5854.60 and a high of 5899.15. Sensex closed at 19305.32 up by 34.58 points or 0.18 percent over the previous day closing of 18842.08. It touched an intraday low of 19257.30 and high of 19416.45.

The markets' breadth was mixed. Out of 3051 stocks traded, 1672 stocks advanced, 1255 stocks declined and 124 stocks remained unchanged. In Sensex, Out of 30 stocks 13 stocks advanced and 17 stocks declined.

Among the sectors, BSE Bankex, BSE FMCG and BSE Teck were the main losers of the day, which decreased by 0.40 percent, 0.34 percent and 0.14 percent respectively.

In BSE Bankex, HDFC Bank, Union Bank and BoB decreased by 2.37 percent, 1.98 percent and 0.62 percent respectively. In BSE FMCG sector, Nestle India, Godrej Inds and ITC declined by 1.62 percent, 1.00 percent and 0.70 percent respectively. In BSE Teck sector, Tata Comm, Onmobile Global, and Tata Teleservices decreased by 3.69 percent, 3.09 percent and 2.41 percent respectively.

## MARKET TURNOVER (Rs.Cr)

NAME	LAST	PREVIOUS DAY
NSE CASH	12010.06	20386.60
NSE F&O	86999.53	117333.79

## NIFTY TOP TURNOVERS

COMPANY	LAST PRICE	SHARE TRADED	TOTAL TURNOVER (Rs. Cr)
MCDOWELL-N	2012.95	2559119	512.36
PANTALOONR	232.05	18502882	413.76
SBIN	2210.00	1862769	409.09
ICICIBANK	1100.25	3252164	358.47
KTKBANK	186.85	16482640	296.25

## NIFTY TOP GAINERS

COMPANY	LAST PRICE	CHANGE	% CHANGE
ACC	1437.40	53.50	3.87
ULTRACEMCO	1999.85	58.45	3.01
SBIN	2210.00	39.70	1.83
RELIANCE	807.00	13.30	1.68
JPASSOCIAT	97.60	1.45	1.51

## NIFTY TOP LOSERS

COMPANY	LAST PRICE	CHANGE	% CHANGE
HDFCBANK	686.75	17.20	(2.44)
IDFC	169.25	3.95	(2.28)
BHARTIARTL	330.85	6.15	(1.82)
GAIL	348.10	5.25	(1.49)
ONGC	261.55	3.40	(1.28)

## OUTLOOK

After initial volatility during the week, Indian markets gained momentum as the UPA government agreed for a vote on FDI in Retail after having gained confidence of some allies, which signalled that the government may be able to push through key reforms. Added to this, positive sentiments were favourable news flows from the US on the Fiscal Cliff and Chinese growth also fuelled global Equities and Commodities rally. During the week, INR also appreciated on these positive vibes which aided Banking stocks appreciation. This week is very crucial as the results of voting on FDI in Retail will throw light on the reforms agenda of the government. If the voting is favourable, we may see markets gaining further grounds, led by Banking & Capital goods stocks and select mid caps like Pantaloon, Aditya Birla Nuvo, Blue Star etc. We recommend investors to BUY SBI, L&T, BHEL in large caps and Blue Star, I&FS Transportation, Cera Ceramics, Pidilite in the mid cap space.

## DOMESTIC INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
SENSEX	19305.32	-34.58	(0.17)
NIFTY	5870.95	-8.90	(0.15)
BSE MID-CAP	6985.48	83.49	1.21
BSE SMALL-CAP	7338.13	62.48	0.85
NSE CNX MIDCAP INDEX	8228.65	88.85	1.09

## SECTORAL INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
AUTO	10834.57	20.11	0.18
CAPITAL GOODS	11119.76	39.56	0.35
FMCG	6017.39	-20.52	(0.34)
METAL	10437.89	82.70	0.79
OIL & GAS	8291.10	38.96	0.47
HEALTHCARE	7961.77	15.29	0.19
POWER	1993.22	12.89	0.65
REALTY	2025.30	26.94	1.34
CONSUMER DURABLES	8075.65	44.41	0.55
BANK	13895.42	-56.46	(0.40)
IT	5891.00	2.58	0.04

## GLOBAL INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
DOW JONES	13025.58	3.76	0.02
NASDAQ	3010.24	-1.78	(0.05)
S&P 500	1416.18	0.23	0.01
FTSE	5884.39	17.14	0.29
CAC	3581.03	23.73	0.66
DAX	7438.01	32.09	0.43
MEXICO BOLSA	41833.52	-257.17	(0.61)
BRAZIL BOVESPA	57474.57	-377.96	(0.65)
RUSSIAN RTS	1436.51	0.04	(0.002)
NIKKEI 225	9458.18	12.17	0.12
HANG SENG	21767.85	-262.54	(1.19)
TAIWAN TAIEX	7599.91	19.74	0.26
SHANGHAI	1959.76	-20.35	(1.02)
KOSPI	1940.02	7.12	0.36
FTSE BURSA MALAYSIA KLCI	1607.35	-3.48	(0.21)
JAKARTA COMPOSITE	4302.44	26.30	0.61
PSEI - PHILIPPINE SE	5672.70	32.25	0.57
STOCK EXCH OF THAI	1332.92	8.88	0.67

## INDUSTRIAL METALS & ENERGY MARKETS

NAME	LAST PRICE	CHANGE	% CHANGE
COPPER (USD/T)	8005.00	10.00	0.12
ALUMINUM (USD/T)	2092.00	-2.00	(0.09)
ZINC (USD/T)	2044.00	-2.00	(0.09)
LEAD (USD/T)	2239.00	-11.00	(0.57)
OIL (USD/BBL)	88.84	-0.05	(0.07)
NATURAL GAS (USD/MMBTU)	3.59	0.03	0.81

## PRECIOUS METALS

NAME	LAST PRICE	CHANGE	% CHANGE
GOLD (USD/OZ)	1724.07	1.61	0.09
SILVER (USD/OZ)	33.50	0.09	0.27

## INDUSTRY INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
BALTIC DRY INDEX	1086.00	-11.00	(1.00)
BBG WORLD IRON/STEEL IDX	170.58	0.07	0.04

## CURRENCIES

NAME	LAST PRICE	CHANGE	% CHANGE
USD-INR	54.76	0.50	0.92
EUR-INR	71.33	0.74	1.05
GBP-INR	87.93	0.85	0.97
INR-JPY	1.50	-0.01	(0.92)

## INSTITUTIONAL FLOW IN Cr (30/11/2012)

INSTRUMENT	PURCHASE	SALE	NET
FII	7350.50	5361.80	1988.80
DII	1455.74	2254.37	(798.63)

## FII DERIVATIVE SEGMENT IN Cr (30/11/2012)

INSTRUMENT	PURCHASE	SALE	NET
INDEX FUTURE	2294.01	1697.81	596.20
INDEX OPTION	12224.14	10679.81	1544.33
STOCK FUTURE	2569.96	2582.92	(12.96)
STOCK OPTION	1244.35	1289.95	(45.61)

## BULK & BLOCK DEALS

[http://www.bseindia.com/mktlive/market\\_summ/bulk\\_deals.asp](http://www.bseindia.com/mktlive/market_summ/bulk_deals.asp)

[http://www.bseindia.com/mktlive/market\\_summ/block\\_deals.asp](http://www.bseindia.com/mktlive/market_summ/block_deals.asp)

- ♦ **Orlando, Florida, USA and Bangalore India, December 3, 2012:** MphasiS (*an HP Company*) today announced a definitive agreement to acquire Orlando, Florida, USA based Digital Risk LLC. Digital Risk is one of the largest independent providers of Risk, Compliance and Transaction Management solutions to the United States mortgage market. The acquisition is an all cash deal valued at USD\$ 175 million with an additional earn-out. component. Digital Risk provides highly specialized Risk, Compliance and Transaction Management solutions for the mortgage industry. Digital Risk's proprietary ***Making Mortgages Safe™*** solutions suite is deployed by over 15 blue chip clients across key mortgage constituencies – Originators, Insurers, Issuers and Investors. Digital Risk is licensed to operate in 46 states in the United States.

CORPORATE ACTION BONUS / RIGHTS / STOCK SPLIT / ADR & GDR / FCCB / M&A / WARRANTS ETC.			
COMPANY	RECORD DATE	Ex-DATE	DETAILS

## OTHER EVENTS

- ♦ U.S. Total Vehicles sales data for the month ended November,2012.



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