



INDICES SNAPSHOT November 26, 2009

SENSEX

SYMBOL	LAST PRICE	PREVIOUS CLOSE	% Change
SENSEX	17,198.95	17,131.08	0.4
FMCG	2,886.87	2,886.87	1.44
OIL&GAS	10,357.78	10,357.78	1.09
PSU	9,174.78	9,174.78	0.7
BANKEX	10,282.11	10,282.11	0.51
CG	13,434.84	13,434.84	0.5
AUTO	7,055.84	7,055.84	0.37
IT	4,852.53	4,852.53	0.16
POWER	3,007.13	3,007.13	0.07
METAL	16,216.72	16,216.72	0.03
TECK	3,047.18	3,047.18	-0.03
CD	3,525.57	3,525.57	-0.12
HC	4,762.15	4,762.15	-0.49
REALTY	3,824.76	3,824.76	-2.93

NIFTY

SYMBOL	LAST PRICE	PREVIOUS CLOSE	% Change
NIFTY	5108.15	5090.55	0.35
JUNIOR	9991.55	9993.15	-0.02
IT	5476.8	5486.2	-0.17
BANK	9303.15	9247.65	0.60

GLOBAL MARKETS (26-11-09) (08.45 AM)

SYMBOL	LAST PRICE	NET CHANGE	% Change
DOW JONES	10464.4	30.69	0.29
NASDAQ	2176.05	6.87	0.32
NIKKEI 225	9445.36	3.72	0.04
HANG SENG	22414.73	-197.07	-0.87

TOP TRADED VOLUMES

SYMBOL	VOLUME	PRICE
SATYAMCOMP	83928510.00	91.15
UNITECH	35275967.00	78.40
SUZLON	31490026.00	70.25
DENABANK	15252220.00	83.05
AUSTRAL	15027260.00	8.95
ASTEC	13242907.00	83.85
DLF	12494064.00	361.10
ISPATIND	11567274.00	20.35
HDIL	10460253.00	321.65
IFCI	9783875.00	49.15

Commentary

The markets had opened on a positive note tracking Asian cues and continued the uptrend whole morning but witnessed some profit booking in the second part of the day to finally close for the day in green but off the day's low and high. The volatility factor was there the whole day being the previous day of the expiry. The negative cue was the investors concern over the money raised by corporates by selling shares. Reliance Industries continued its upward journey as it reopened near to 900 petrol pumps in the country. Giving support from the sectoral front were the banking and FMCG. Realty however remained weak today. Stock specifically, Atlanta, Mastek, Abhishek Industries, Punjab Chemicals etc made good gains. However Satyam and Matyas Infra lost ground. In the second part of the day the cues from the European markets were good and even then the markets couldn't remain at highs and finally came to a close with Sensex up 0.4% and Nifty up 0.35%. The Nifty rollover figure was also decent and it was around 59%. The policy initiations are going to attract foreign investment in India at a time when dollar is under pressure and this may get tremendous response from institutional investors. India is in need of more capital for its infrastructure development programmes. On the sectoral front the major gainers were FMCG up 1.44%, Oil up 1.09%, PSU up 0.7% and Bankex up 0.51% while those on the losers' side were Realty down 2.93%, Healthcare down 0.49%, Consumer Durable down 0.12% and Technology down 0.03%. On Nifty the major gainers were BPCL up 6.44%, GAIL up 4.23%, Hero Honda up 2.51% and ITC up 1.95% while those on the losers' side were DLF down 3.26%, Suzlon down 1.89%, Unitech down 1.75% and Reliance Capital up 1.74%. The market breadth was negative; about 1,354 shares advanced while 1,545 shares declined on the BSE. Nearly 534 shares remained unchanged. Top percentage gainers - Samyak International and Hilton Metal shot up 20% each. Atlanta, Abhishek Corp, Amco India and Mastek were up 14.5-19%. Punjab Chemical rose 10.73%. In the midcap space, United Phosphorous, Sintex India, Kirloskar Oil, KGN Industries and Mcleod Russel were up 5-6% while Motherson Sumi, Indiabulls Real, OnMobile Global, Tech Mahindra and HDIL fell 4.5-7%. Tomorrow is the day of November F&O expiry and so we may see Nifty witnessing resistance at 5145 and 5163 while support is there at 5080 and 5053.

TOP GAINERS (NSE)

SYMBOL	LAST PRICE	PREVIOUS CLOSE	% Change
HILTON	20.65	17.2	20.06
ATLANTA	152.2	126.8	20.03
MASTEK	360	306	17.65
SRGINFOTEC	0.8	0.7	14.29
ABHISHEK	24	21.05	14.01
COMPUTECH	4.3	3.85	11.69

TOP LOSERS (NSE)

SYMBOL	LAST PRICE	PREVIOUS CLOSE	% Change
SATYAMCOMP	91.15	101.6	-10.29
ANTGRAPHIC	0.45	0.5	-10
KSERAPRO	12.80	14.2	-9.86
SGL	8.00	8.8	-9.09
GRINDWELL	142.35	155.05	-8.19
AMBIKCO	106.10	115.05	-7.78

NEW HIGHS & NEW LOWS (BSE)

NEW HIGHS		NEW LOWS	
SCRIP	PRICE	SCRIP	PRICE
HINDUSTAN	1,134.00	SHREEJAL	0.44
SHREE CEM	1,784.80	KSL INDS	54
MAHINDRA	1,092.00	ASTEC LIFE	80
GROWEL I	6.30	NORTHGAT	26.25
WPIL	189.45		
SAMPADA C	41.60		
CITURGIA B	431.75		
KELTECH	299.95		
STERLITE P	56.90		

FOREX MARKET (26-11-09)

Value	Change	%Change
46.215	-0.1788	-0.39

ECONOMIC INDICATORS

GDP Rate FY'09	6.1%
Inflation Rate (for the month ended October 2009)	1.34%
CALL RATES	3.25% /3.30%

PIVOT POINT

INDEX	R1	R2	S1	S2
NIFTY	5137.98	5167.82	5078.33	5048.52
SENSEX	17284.9	17370.86	17118.57	17038.20

SGX NIFTY (26-11-09) (8.15 AM)

LAST	PREVIOUS CLOSE	% CHANGE
5,081.50	5,112.00	-0.60

BALTIC INDEX

DATE	CLOSE	PRE CLOSE	% CHANGE
26-Nov-09	4234	4340	-2.44

ADR CLOSING (25-11-09)

SYMBOL	% CHANGE
HDB	2.95
WIT	2.18
REDF	2.06
SLT	1.76
INFY	1.64
IBN	1.56
MTE	1.26
TTM	0.14
VSL	0.06
RDY	-0.46
SIFY	-0.52
WNS	-0.82
PTI	-2.64
SAY	-7.92

ADVANCES / DECLINES (ALL MARKET)

ADVANCES	DECLINES	MARKET BREADTH
1290	1486	NEGATIVE

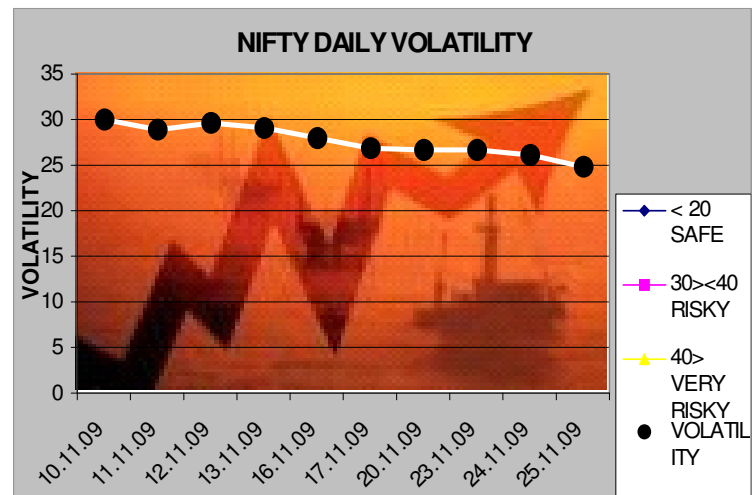
FII DAILY ACTIVITY (on 25-11-09)

	PURCHASES (Rs.in crores)	SALES (Rs.in crores)	NET INVESTMENT (Rs in crores)
Equity	2041.1	2372.75	-331.65

SENSEX – WEEKLY



NIFTY – WEEKLY VOLATILITY



LIGHT CRUDE

	% CHANGE	CHANGE
77.47	-0.49	-0.63

NEWS BOX

- ◇ Navratna aluminium giant **National Aluminium Company** (Nalco) has decided to give cash incentive for disposal of fly ash, about 7,000 million tonnes (MT) of which is generated at its 1,200 Mw thermal captive power plant here everyday.
- ◇ Sugar maker **Balrampur Chini Mills** today said its net profit surged by nearly threefold to Rs 42.73 crore in the quarter ended September 30. Total income, on the standalone basis, declined to Rs 379.96 crore in the latest quarter from Rs 416.73 crore in the same period last fiscal, Balrampur Chini Mills said in a filing to the Bombay stock Exchange (BSE).
- ◇ In the face of alleged multi- crore rupee kickback, which is being probed by CBI, the government is considering cancelling power PSU **NTPC's** Rs 2,000-crore contract with a Russian equipment firm.
- ◇ **Oman Oil Company** has paid a premium to pick 26 per cent stake in Bharat Petroleum Corporation's under construction Bina Refinery Project in Madhya Pradesh.
- ◇ Communication solutions provider **Avaya GlobalConnect** today reported an over two-fold jump in its net profit at Rs 10.10 crore for the quarter ended September 30, 2009 on the back of improved margins and optimal utilisation of resources.
- ◇ The government today said there would be no negative impact of organised retailing on the unorganised sector, which accounts for 96 per cent of retail business. Replying to supplementaries in Rajya Sabha during Question Hour, Commerce Minister Anand Sharma said, "There can be no negative impact of organised retailing on unorganised sector as 96 per cent of retail business is in unorganised sector
- ◇ Infrastructure development firm **Valecha Engineering** today said its board will meet on November 27 to consider raising of funds through international markets. The board would meet to consider raising of funds through the issue of American Depositary Receipts, Global Depositary Receipts and Foreign Currency Convertible Bonds, Valecha Engineering said in a filing to the BSE.
- ◇ Jagdish Khattar-promoted **Carnation Auto** today said it has raised Rs 170 crore debt from public sector lender Punjab National Bank to fund its expansion programme. As per the financial closure, Punjab National Bank (PNB) would fund Carnation Auto's expansion of multi-brand auto solution hubs across the country, the multi-brand car service provider Carnation Auto.

PIVOT POINT OF BSE TOP TRADED STOCKS BY VOLUME

STOCKS	LAST PRICE	SUPPORT 1	SUPPORT 2	PIVOT	RESISTANCE 1	RESISTANCE 2
SUZLON ENERGY	70.1	68.97	67.83	70.98	72.12	74.13
UNITECH	78.35	76.80	75.25	79.20	80.75	83.15
HDIL	320.15	311.72	303.28	324.93	333.37	346.58
INDIAN HOTELS	86.05	85.32	84.58	86.23	86.97	87.88
GVK POWER	52.7	51.83	50.97	52.42	53.28	53.87
ISPAT INDS	20.4	20.20	20.00	20.50	20.70	21.00
GUJARAT STATE	97.35	95.60	93.85	97.05	98.80	100.25
IFCI	49.55	49.13	48.72	49.82	50.23	50.92
DLF	362.15	356.67	351.18	366.08	371.57	380.98
RELIANCE NAT R	70.2	69.40	68.60	70.65	71.45	72.70

NIFTY SUPPORT AND RESISTANCE

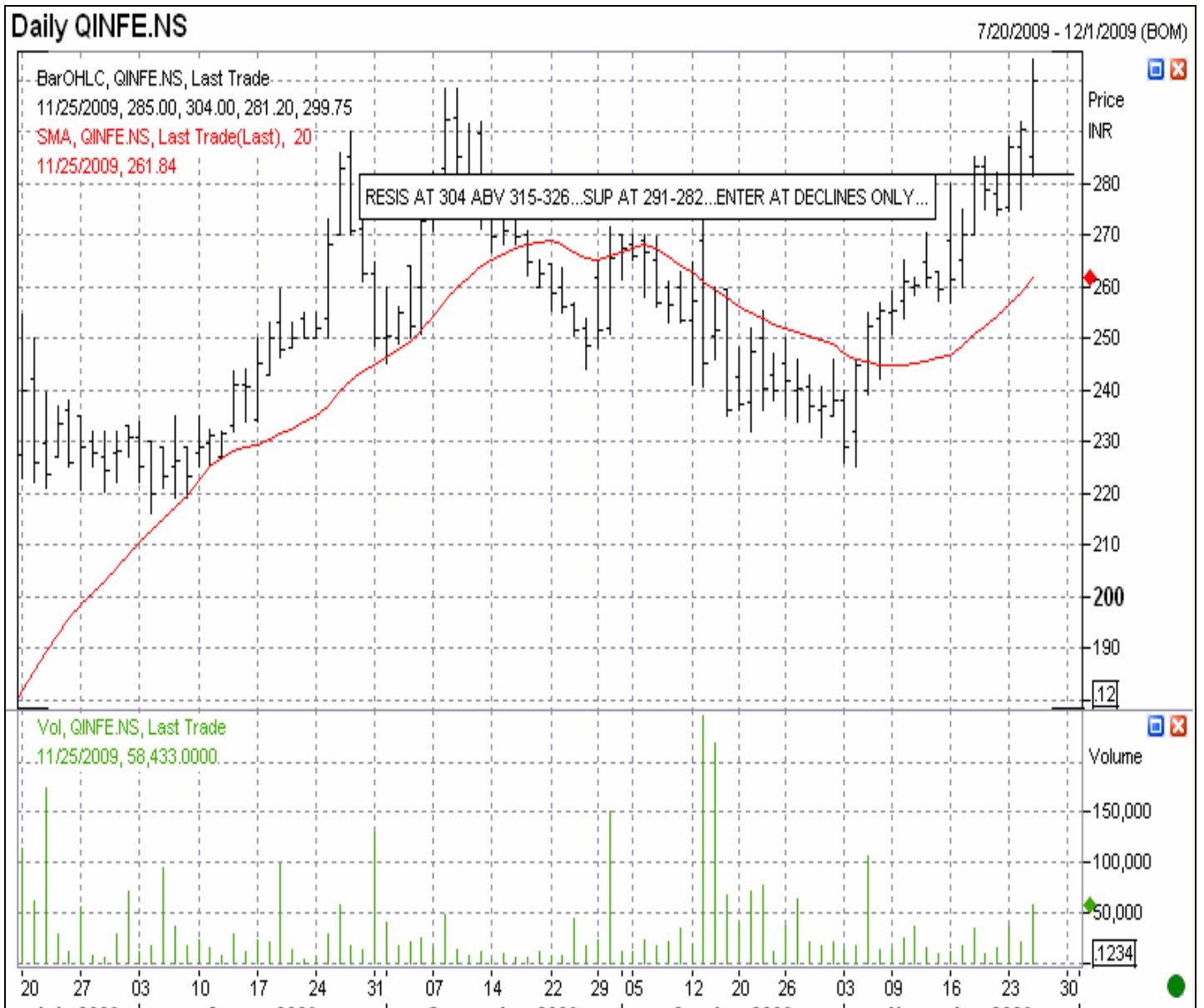


RESIS AT 5125 AND 5182 LEVELS... SUP AT 4925 AND 4860...

EDITOR'S DESK

MARKET IS EXPECTED TO OPEN ON A DOWNSIDE NOTE AND IS EXPECTED TO TRADE LOWER BEFORE NOON BUT IN THE SECOND PART OF THE DAY WE MAY SEE MARKETS RECOVERING. BEING F&O EXPIRY, WE MAY SEE GOOD AMOUNT OF VOLATILITY.

STOCK TO WATCH: - INFOTECH ENTERPRISE (299.75)



RESIS AT 304 ABV 315-326...SUP AT 291-282...ENTER AT DECLINES ONLY...

SUBDUED TO WEAK: - NTPC (215.2)



MAJOR SUP AT 213 BELOW 210.5 LEVELS...RESIS AT 218...

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