



Index	Previous Close	Open	High	Low	Close	Change	Change%
Sensex	34,981.02	35,118.09	36,389.22	34,896.07	36,194.30	+1213.28	+3.47
Nifty	10,526.75	10,568.30	10,922.45	10,489.75	10,876.75	+350.00	+3.32

Strong rally in Nifty & Sensex

Indian equity benchmark ended on a robust note in the week ended 30th November, 2018 after trading in green. Key indices were positive in all sessions of the week. The S&P BSE Sensex gained 1213.28 points or 3.47% to settle at 36,194.30 in the week ended 30th November 2018. The CNX Nifty gained 350.00 points or 3.32% to settle at 10,876.75. The BSE Mid Cap index gained 159.01 points or 1.07% to settle at 15,039.35. The BSE Small Cap index gained 76.33 points or 0.53% to settle at 14,427.16.

The equity benchmarks bounced on Monday, 26th November 2018 after falling for previous three trading sessions, Sensex gained 373.06 points or 1.07% to settle at 35,354.08; Bulls continued to be in power on Tuesday, 27th November 2018 as indices surpassed their crucial levels. Sensex gained 159.06 points or 0.45% to settle at 35,513.14. On Wednesday, 28th November 2018, trade remained strong and started on an optimistic note with a report from RBI Governor that the note ban's impact was transient and the economy is robust. Sensex gained 203.81 points or 0.57% to settle at 35,716.95. Thursday, 29th November 2018 the day of F& O monthly settlement, markets made a robust move and ended strong in green; Sensex gained 453.46 points or 1.27% to settle at 36,170.41. On Friday, 30th November 2018 Indices ended marginally higher. Sensex gained 23.89 points or 0.07% to settle at 36,194.30.

BSE Sector	Current	Last	% Change
IT Sector			
PERSISTENT	604.90	550.40	+9.90
TCS	1970.60	1815.25	+8.56
MPHASIS	999.40	923.30	+8.24
INFY	666.50	620.45	+7.42
WIPRO	324.85	307.45	+5.66
MINDTREE	876.25	829.55	+5.63
HCLTECH	1014.40	979.55	+3.56
KPIT	207.95	201.90	+3.00
TECHM	705.50	690.95	+2.11

Comment:

The S&P Information Technology ended at 14,296.74 up by 853.20 points or by 6.35%. Persistent, TCS, Mphasis and Infosys were among the major gainers in the week gaining 10%-07%.

Most active (by value)

Rs. Cr (NSE)

Name	Qty	Pr.	Vol.
DIVISLAB	17458.89	1439.35	2512.95
JETAIRWAYS	65114.11	305.70	1990.54
DHFL	86357.58	212.75	1837.26
ARVIND	161642.85	102.90	1663.30
JSWSTEEL	39904.57	314.25	1254.00

Most active (by Qty)

Rs. Cr (NSE)

Name	Qty	Pr.	Vol.
RCOM	307521.60	14.25	438.22
SUZLON	218336.96	5.15	112.44
IDEA	163318.67	35.30	576.51
ARVIND	161642.85	102.90	1663.30
JPASSOCIAT	160674.05	6.90	110.87

Top gainers

(NSE)

Name	Current Pr.	Prev. Pr.	%change
HOTELEELA	16.30	8.85	84.18
8KMILES	183.85	144.15	27.54
VAKRANGEE	32.20	25.35	27.02
PRESTIGE	216.55	172.45	25.57
ADANIPOWER	55.50	47.55	16.72

Top losers

(NSE)

Name	Current Pr.	Prev. Pr.	%change
RECLTD	99.90	121.00	-17.44
SHANKARA	693.80	822.75	-15.67
RAIN	133.25	151.35	-11.96
BEL	83.25	93.75	-11.20
INDIAGLYCO	299.95	334.45	-10.32

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
<u>FMCG Sector</u>			
VADILALIND	534.45	489.00	+9.29
COLPAL	1217.25	1148.60	+5.98
GODREJCP	750.45	715.90	+4.83
HINDUNILVR	1753.60	1674.65	+4.71
NESTLEIND	10718.95	10313.00	+3.94
JUBLFOOD	1254.60	1208.45	+3.82
DABUR	410.60	399.85	+2.69
ITC	286.25	280.45	+2.07
TATAGLOBAL	219.00	215.85	+1.46

Comment:

The S&P FMCG Index ended at 11,647.29 up by 310.06 points or by 2.73%. Vadilal Industries, Colgate Palmolive, Godrej CP and Hindustan Unilever were among the major gainers in the week gaining 10%-04%.

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
<u>Bank Sector</u>			
INDUSINDBK	1631.55	1529.15	+6.70
FEDERALBNK	85.30	80.60	+5.83
HDFCBANK	2117.15	2005.45	+5.57
KOTAKBANK	1232.35	1171.40	+5.20
AXISBANK	625.75	614.30	+1.86
ICICIBANK	355.00	351.95	+0.87
SBIN	284.35	282.60	+0.62
PNB	69.75	71.70	-2.72

Comment:

The S&P Bank Index ended at 29,948.98 up by 756.93 points or by 2.59%. IndusInd Bank, Federal Bank, HDFC Bank and Kotak Bank were among the major gainers in the week gaining by 07%-05%

Corporate News:

- **Chambal Fertilisers and Chemicals** shares rose 3.67% after company's production of Urea has commenced on trial basis from Gadepan-III Plant in Kota, Rajasthan.
- **Zuari Agro Chemicals Ltd** rose 5.2% after the company's operations at its urea plants have resumed.
- **Reliance Communications Ltd** surged as much as 14.9%. The Supreme Court has asked the Department of Telecom (DoT) to clear RCom's spectrum sale to Reliance Jio Infocomm Ltd on corporate guarantee of Rs 1,400 crore. The top court also asked DoT to give no objection certificate for takeover within a week of receiving the guarantee.
- **Tata Motors** shares traded 1.86% lower, as Jaguar Land Rover will reduce the workforce at its plant in Wolverhampton, central England, by about 500 in a temporary move. The company said in response to adjustments in vehicle production schedules, the Engine Manufacturing Centre will take a temporary pause in production.
- **Bajaj Allianz Life Insurance** is looking to raise its exposure to local IT services companies and drugmakers in 2019, drawn by attractive valuations and easing regulatory issues, even as a strengthening rupee threatens to hurt earnings. Strong free cash flows and growth in the main export market in the U.S. bode well for IT firms, while select pharmaceutical companies will benefit from the resolution of regulatory clampdowns and steady drug approvals.
- Shares of **non-banking financial companies** gained after RBI on Thursday relaxed norms for NBFCs to securitise their loan books, allowing the companies to securitise loans of over five-year maturity after holding them for six months on their books. DHFL rose over 7%, PNB Housing shares gained nearly 3%, Gruh Finance advanced over 2%, Indiabulls Housing Finance was up over 3%, Bajaj Finance jumped over 2%, GIC Housing Finance added 2%.
- **State Bank of India (SBI)** has given approval for the sale of 4% stake in SBI General Insurance for Rs 482 crore to two alternative investment funds (AIFs).
- **Gross Domestic Product (GDP)**, a measure of the country's total economic output, came at 7.1% for the second quarter of fiscal year 2018-19, as against 8.2% in the Q1 of 2018-19 and 6.3% growth in the same quarter of the previous year.
- **Jubilant Life Science's wholly-owned subsidiary company -- Drug Discovery and Development Solutions, Singapore (DDDSL)** -- has entered into Stock Purchase Agreement (SPA) on November 29, 2018 for acquiring 534,194 shares of Common Stock of Inipharm Inc., USA.
- **Torrent Pharmaceuticals** has fully redeemed the Unsecured Redeemable Non-Convertible Debentures (NCDs) of Rs 500 crore. The company has repaid the same on November 29, 2018.
- **Indiabulls Housing Finance** has raised funds through allotment of its eighth tranche of Secured, Redeemable, Non-Convertible Debentures (NCDs) of face value Rs 10 lakh each aggregating to Rs 200 crore. The date of allotment is November 29, 2018, with a tenure of 3 Years and 1 Month and the date of maturity of the instrument is December 29, 2021.

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