

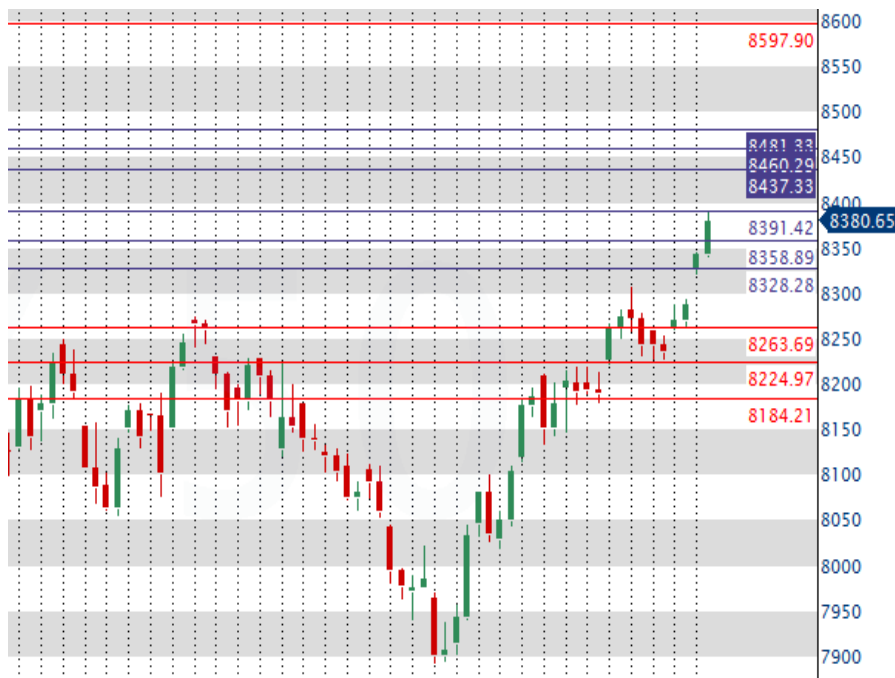


MORNING WRAPUP



**Market Outlook:** Today evening the data on industrial production for November, and Consumer Price Index-based inflation for December are scheduled to be announced. The Nifty after a positive start, may consolidate around the first resistance at 8414. Above this, the higher resistance is at 8437. The Critical support level is at 8358 and a fall below this could find first support at 8328. The major support is at 8290.

**Global:** U S markets ended marginally higher yesterday, led by gains in oil producing companies, as prices of crude oil surged on the back of a weak dollar and reports that Saudi Arabia cut some supply to Asia. Dow Jones is just 46 points away from the historical 20,000 mark. There was a sharp decline in health care stocks following remarks by U S president-elect Donald Trump in his press conference that pharmaceutical companies were "getting away with murder" by charging high prices. Investors



Country	LTP	Change	% Change
US DOW	19954	99	0.5
Nasdaq	5050	15	0.3
Germany-DAX	11646	63	0.54
France	4889	0	0.01
UK - FTSE	7290	15	0.21
HongKong	22924	-11	-0.05
JAPAN	19192	-173	-0.89
CHINA	3134	-3	-0.08
THAILAND	2221	-1	-0.05

looking for clues to his tax and international trade policies were disappointed as no specific details were given. Key Asian indices are trading weak in the morning trade. The strength in the yen against the dollar weighed on shares of major exporters in Japan, bringing the Nikkei 225 index down by nearly 1%.

**Data to Watch:** FII Cash -627cr, DII Cash +1116cr

Brent Crude: \$55.10/bbl; Rupee: 68.3200/\$1; Gold: \$1,196.6/ounce; 10-yr yld: 6.3912%

Today: IIP for November, CPI Inflation for December at 5.30 p m  
 IIP seen at 0.4% where as CPI inflation seen further easing to 3.5%  
 Japan Economic Survey for December, U S weekly jobless claims

**Major Q3 Results:** TCS, CYIENT, BAJAJ CORP

TCS (expected to post a mere 1% sequential rise in consolidated net sales to 295.96 bln rupees while the consolidated net profit is likely to remain flat at 65.73 bln rupees). CYIENT (consol net profit seen 1 bln rupee, +3% QoQ)

**Stocks in News:**

**Neutral:** APL APOLLO: Has received patents from the Indian Patent Office for two new product designs. BIOCON: Biocon and Mylan said that the U S regulator has accepted Mylan's biologics license application (BLA) for MYL- 14010, a proposed biosimilar trastuzumab indicated for treatment of breast cancer. COAL INDIA: Is likely to consider an 8-10% increase in prices of lower-grade coal next week to offset the impact of inflationary pressures and lower realisation from e-auctions. HAVELLS: Is looking to make large acquisitions in overseas emerging markets to secure strong brands, a top company official said. IDEA: Has unveiled plans for prepaid customers with 3GB free data on a recharge pack of 348 rupees, besides unlimited voice calling and messaging. MRF: Has signed a MoU with the Gujarat government to set up a facility in the state for manufacture of automobile tyres, tubes, flaps and related products. Tyre major said it will invest around 45bln rupees in a phased manner over a period of ten years. RELIANCE IND: The oil ministry has sought legal advice on whether it should recover \$1.55 bln from the company for alleged production of gas from the basin it shares with ONGC. PHARMA STOCKS: Shares of pharmaceutical companies are seen under pressure in line with global peers, after US president-elect Donald Trump said he will force the industry to bid for government contracts. "They're getting away with murder," by charging higher prices, Trump told US reporters at press conference yesterday.

**Fund Action:** INDIABULLS HOUSING: Swiss Finance Corp (Mauritius) has sold 1.61 mln shares, or 0.38% stake, in the Indian housing finance company to Societe Generale SA at 688.75 rupees per share. ICRA: Birla Sun Life Asset Management Company has raised its stake in rating agency to 9.01% by buying additional 2 lakh shars from the open market.

Stock	QTY	Rate	Value	CMP	Current Value
Amara Raja Bat	100	861	86100	906.8	90680
COLGATE	100	872.6	87260	895	89500
LIC HOUSING	100	508.25	50825	532.85	53,285
Triveni Turbine	400	128.57	51428	119.65	47,860
Asian Paints	100	849.80	84980	934.65	93,465
HCL TECH	100	816.00	81600	833.25	83,325
ITC	450	216.00	97200	247.55	111,398
Kotak Bank	100	660.75	66075	728.4	72,840
Marico	300	242.20	72660	261	78,300
Praj Ind	700	87.35	61145	85.40	59,780
Reliance Ind	100	1,031.40	103140	1086.05	108,605
Sarla Perfo Fibers	700	64.46	45122	65.1	45,570
SYNGENE	200	382.60	76520	604	120,800
ZEE Ent	200	415.88	83176	478.3	95,660
SBIN	200	279.70	55940	252.15	50,430
			1,103,171		1,201,498
<b>Profit/Loss Booked</b>	<b>QTY</b>	<b>Entry</b>	<b>Value</b>	<b>Exited@</b>	
Aditya Birla Nuvo	100	829	82900	1002	100,200
ZEEL	100	388.85	38885	439	43,900
Repco Home	100	590.05	59,005	670.2	67,020
Motherson Sumi	300	253.8	76,140	282.1	84,630
TataMotors	300	377.7	113,310	424.25	127,275
PI IND	100	579.7	57,970	687	68,700

Notional P/L	98,327
Profit Booked	63,515
Total Profit	161,842
Current NAV	1,317,315
% Gain	14.01
Initial Value	1,155,473
Nifty on Mar 23	7716.5
NIFTY.NSI	8380.65
% Change	8.61

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Emerging Stories

Name	QTY	Entry Rate	Entry Value	CMP	VALUE
APAR INDUSTRIES LTD	200	471.59	94318	629.8	125,960.00
ASTRAL POLY TECHNIK LTD	100	437.87	43787	389.7	38,970.00
AVANTI FEEDS LTD	100	448.45	44845	552.65	55,265.00
CAPITAL FIRST LTD	200	503.33	100666	610.4	122,080.00
GARWARE WALL ROPES LTD	100	343.68	34368	616.35	61,635.00
GODREJ PROPERTIES LTD	200	321.28	64256	326.15	65,230.00
GREENPLY INDUSTRIES LTD	300	216.03	64809	256	76,800.00
LA OPALA RG LTD	100	576.97	57697	475.25	47,525.00
MOLD-TEK PACKAGING LTD	200	181.65	36330	199.5	39,900.00
SADBHAV ENGINEERING LTD	200	274.52	54904	275.75	55,150.00
SAGAR CEMENTS LTD	200	574.26	114852	678.2	135,640.00
SHILPA MEDICARE	200	477.25	95450	704.95	140,990.00
SUPRAJIT ENGINEERING LTD	200	171.06	34212	199.3	39,860.00
SRIPIPES	100	278.85	27885	285.5	28,550.00
AIA ENGG	100	1315	131500	1316.05	131,605.00
			999879		1,165,160.00
<b>STOCKS EXITED</b>					
GARWARE WALL ROPES LTD	100	343.68	34368	358.04	35,804.00
SUPRAJIT	200	148.62	29724	172.1	34,420.00
ASTRAL POLY	100	437.85	43785	452	45,200.00
Avanti Feeds	100	448.45	44845	478	47,800.00
Mold-tek Packaging	200	156.95	31390	163	32,600.00
KPR MILLS	100	879.7	87970	980.4	98,040.00
HERITAGE FOODS LTD	100	514.56	51456	932	93,200.00

Entry Rate	1124045
Gain for 100 unit	228,807
% Gain of 100 unit	20.36
Nifty 500 on May 11	6593
Nifty 500 Today	7214.15
% Gain in Nifty500	9.42

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