

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 7456 | (1.33) | CNX IT | 11242 | (0.56) |
| Sensex | 24539 | (1.15) | BANK NIFTY | 15068 | (1.61) |
| DowJones | 16154 | (1.80) | S&P CNX 500 | 6252 | (1.41) |
| Nasdaq | 4517 | (2.24) | CNX FMCG | 19194 | (0.46) |
| Hangseng | 18843 | (3.11) | CNX REALTY | 2892 | (2.71) |
| Shanghai | 2713 | (1.34) | CNX AUTO | 7470 | (1.31) |
| Nikkei | 17194 | (3.14) | CNX ENERGY | 8235 | (2.79) |
| Strait Times | 2538 | (1.59) | CNX PHARMA | 3351 | (1.46) |
| Kospi | 1888 | (0.99) | Advances / Declines | BSE | NSE |
| Taiwan | 8064 | (0.82) | Advances | 856 | 378 |
| FTSE | 5922 | (2.28) | Declines | 1841 | 1168 |
| CAC | 4284 | (2.47) | Unchanged | 113 | 55 |
| DAX | 9581 | (1.81) | Total | 2810 | 1601 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| BHARTIARTL | 302.30 | 1.92 |
| BAJAJ-AUTO | 2361.10 | 1.43 |
| LUPIN | 1710.00 | 0.44 |
| DRREDDY | 3054.90 | 0.14 |
| HINDUNILVR | 801.45 | 0.06 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| VEDL | 64.45 | (8.45) |
| TATASTEEL | 230.20 | (7.66) |
| CAIRN | 117.90 | (5.26) |
| NTPC | 133.30 | (4.96) |
| TECHM | 473.85 | (4.77) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| THERMAX | 1.70 | 0.2 | 8 |
| VRLLOG | 3.24 | 0.5 | 7 |
| MANAPPURAM | 30.79 | 6.1 | 5 |
| ESSDEE | 7.72 | 1.6 | 5 |
| AMARAJABAT | 0.96 | 0.2 | 4 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|-------|-------|
| USD/INR | 67.834 | 0.161 | 0.24 |
| GBP/INR | 97.613 | 1.098 | 1.14 |
| EUR/INR | 73.932 | 0.521 | 0.71 |
| JPY/INR | 56.210 | 0.430 | 0.77 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 26779 | 85 |
| Silver (Rs/1kg) | 34773 | (47) |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 29.6 | (5.10) |
| Brent (US\$/BBL) | 32.5 | (4.22) |
| Gold (US/oz) | 1128.9 | 0.15 |
| Silver (US\$/oz) | 14.3 | (0.07) |
| Copper (US\$/MT) | 4605.5 | 1.58 |
| Alum (US\$/MT) | 1524.5 | 0.30 |
| Zinc(US\$/MT) | 1675.5 | 3.75 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 6.02 | (0.40) |
| HDFC Bank | 58.67 | (1.26) |
| Infosys | 17.56 | (0.21) |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 44.61 | (0.67) |
| Wipro | 11.77 | (0.07) |
| Tata Motors | 24.15 | (1.35) |

Market Sensor

US market closed sharply lower Tuesday as renewed declines in oil prices weighed amid mixed reaction to some key earnings reports. Dow Jones Industrial Average was down 1.80% or 295.64 points at 16153.54. Nasdaq Composite was down 2.24% or 103.42 points at 4516.95 Standard & Poor's 500 was down 1.87% or 36.35 points at 1903.30.

Indian equity market tanked over a percent after sharp fall in the European markets, RBI left the key repo rate unchanged at 6.75%, saying it would want to wait for more inflation data and the Union Budget before taking action. Nifty ended the previous day with a decline of 1.33% or 100.40 points at 7455.55. On Tuesday's trading session, FII's sold net Rs.113.98 Cr in cash market and sold Rs.1160.41 in derivative segment. Whereas, DII sold net Rs.323.23 Cr in cash segment.

Global News

❖ Growth in the UK construction sector slowed down in January to its weakest level for nine months. The Markit construction purchasing managers' index (PMI) fell to 55 from 57.8 - well below the 57.5 forecast by economists. (BBC)

❖ Unemployment in the eurozone dropped in December to its lowest rate in over four years despite worries about the global economy. Eurostat, the EU's statistical agency, said the jobless rate in the 19 country eurozone had fallen to 10.4% from 10.5% in November. (BBC)

❖ Russia is lining up seven state companies, including airline Aeroflot, for potential privatisation. Kremlin spokesman Dmitry Peskov said the list of companies to be privatised and the size of the stakes were yet to be finalised.

❖ The Bank of Japan (BOJ) hopes that cutting interest rates below zero will boost spending and investment, but fear, inertia and years of paltry returns mean the nation's army of savers is unlikely to march to the central bank's tune. (Reuters)

❖ U.S. oil futures extended losses into a third session in early Asian trade on Wednesday as U.S. crude stocks last week surged to more than half a billion barrels, stoking concern over global oversupply. (Reuters)

❖ Bank of Japan policymakers debated the feasibility of adopting supplementary steps for their massive stimulus programme, though they agreed that the broad price trend was improving steadily, minutes of their December rate review showed on Wednesday. (Reuters)



❖ The Reserve Bank of India (RBI) kept its key policy rate unchanged in its sixth bi-monthly monetary policy review on Tuesday, even as it indicated that rates would continue to soften, prompted by benign inflation and weak economic and industrial growth. (BS)

❖ Paving the path for the full-fledged implementation of the Forest Rights Act in Tamil Nadu, the Supreme Court has vacated an interim order of the Madras High Court staying the issuance of pattas in the state under the landmark legislation. (BS)

❖ The BJP-led government in Maharashtra, in a bid to further strengthen its investor friendly image, on Tuesday announced formation of a separate cell under its single window scheme for providing number of approvals at one place within a stipulated time. (BS)

❖ Government's initiatives like Digital India, Make in India and Smart Cities Mission present American businesses a good opportunity to sell high-tech products in the country, USEXIM Bank said. (BS)

❖ The Department of Telecom (DoT) is preparing a detailed project report (DPR) for providing telecom connectivity to the North-East region. (BS)

❖ Centre has initiated efforts to reform EPFO and ESIC for benefit of organised sector employees and its plans to extend ESIC benefits are part of a larger scheme to upgrade facilities for medical education and specialised tertiary care, Prime Minister Narendra Modi said. (BS)

❖ Slower growth recovery may prompt a potential rethink of government's policy stance away from fiscal consolidation towards "reflating" aggregate demand, says a report by global financial services major UBS. (BS)

❖ Government will shift Rs 500-crore Price Stabilisation Fund (PSF) to Consumer Affairs Ministry from Agriculture Ministry for effective control of price rise in essential commodities and provide relief to the consumers. (BS)

❖ Chhattisgarh will soon get a fund of Rs 828 crore from the Centre to complete the ongoing and pending irrigation projects in the state, an official spokesperson said here. (BS)

❖ The government is working out a package of incentives for solar power plants having generation capacity of 3,000 Mw or more and an announcement pertaining to this is likely to be made in the forthcoming Budget on February 29. (BS)

❖ 510 sugar mills, which started crushing operations, have produced 14.25 million tonnes of sugar till January end, 4.57 per cent higher as compared to 2014-15 sugar season till 31st January, 2015, said Indian Sugar Mills Association. (BS)

Domestic News

❖ Coal India Ltd is likely to buy back shares worth at least 25 billion rupees (\$368 million) from the government, as the finance ministry looks to state firms for cash ahead of the budget, said a media report.

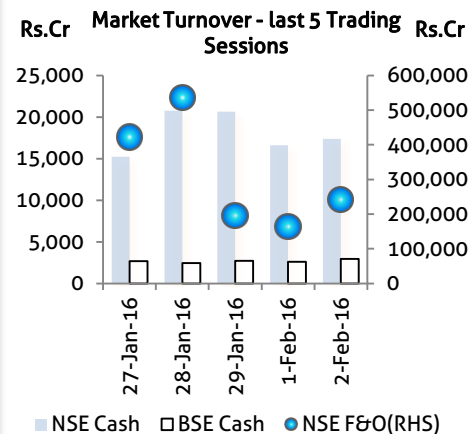
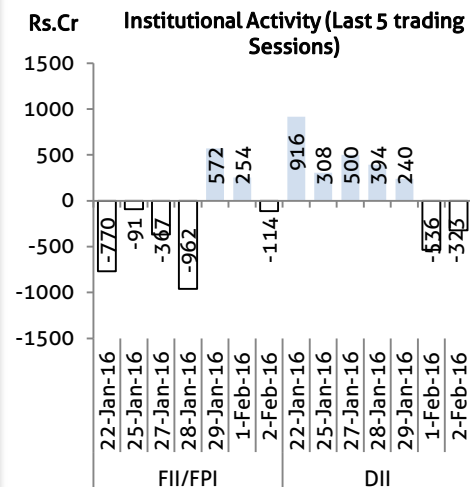
❖ Infrastructure conglomerate Adani Group, has secured the approval of the Queensland government for the \$16.5 billion Carmichael mine project in the state's Galilee Basin, clearing one more obstacle to start work on the coal mine, amid protests from environmental activists in Australia, said a media report.

❖ Vedanta Ltd will repurchase bonds worth up to \$250 million (about Rs 1,700 crore) of its outstanding \$1.25 billion convertible bonds due this year.

❖ The initial public offer of staffing firm TeamLease Services was subscribed 17 per cent on the first day of the issue.

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.0924 | 0.0006 | 0.00 |
| GBP-USD | 1.4408 | (0.0004) | (0.02) |
| USD-JPY | 119.61 | (0.3600) | (0.30) |

| Bond Markets | Closing | Chg |
|----------------|---------|-----------|
| 10-yr bond | 7.81 | 2.00 bps |
| Interbank call | 6.65 | -3.45 bps |



Domestic News (Cont...)

❖ Pharma Major Lupin announced that its US subsidiary, Lupin Pharmaceuticals Inc. has launched its Metformin HCl ER Tablets, 500 mg and 1000 mg to market a generic equivalent of Santarus Inc.'s Glumetza HCl ER Tablets, 500 mg and 1000 mg.

❖ AstraZeneca announced that it has completed the transaction to acquire a majority equity stake in Acerta Pharma, a privately-owned biopharmaceutical company based in the Netherlands and US.

❖ The proposed Rs. 5,000-crore deal by Birla Corporation Ltd. to acquire two cement manufacturing units of Lafarge India Pvt. Ltd., along with two cement brands has been called off.

❖ Godrej Properties Ltd. is hoping to double its full-year sales booking in the current financial year from the INR 2,600 crore levels that it recorded in 2014-15.

❖ India's third-largest mobile phone operator, Idea Cellular, rolled out its high-speed 4G LTE services in Odisha, expanding its footprint in eight telecom circles in the country.

❖ Consumer products major Marico is open to making acquisitions in the South East Asian and East African regions in a bid to expand its footprint. Move comes as Marico consolidates gains made in the local and international business.

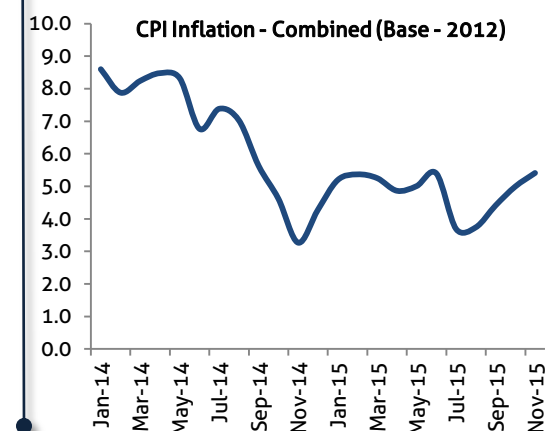
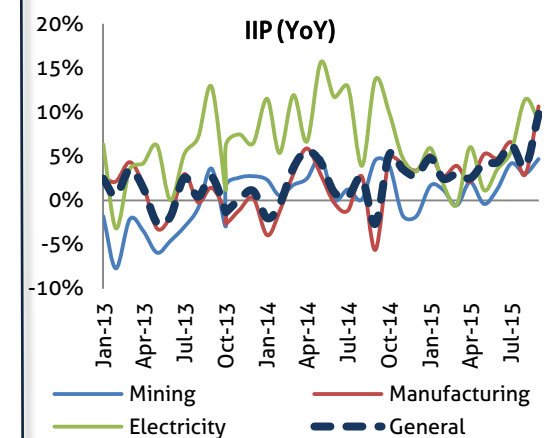
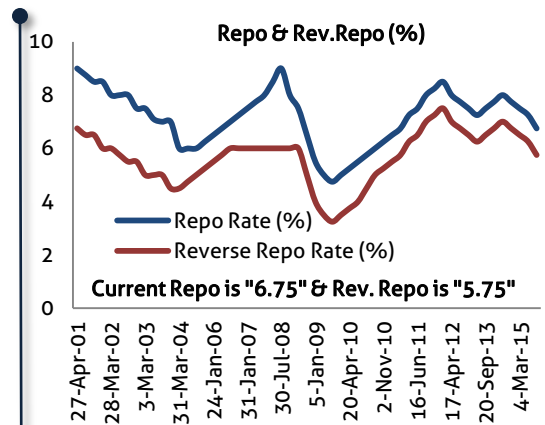
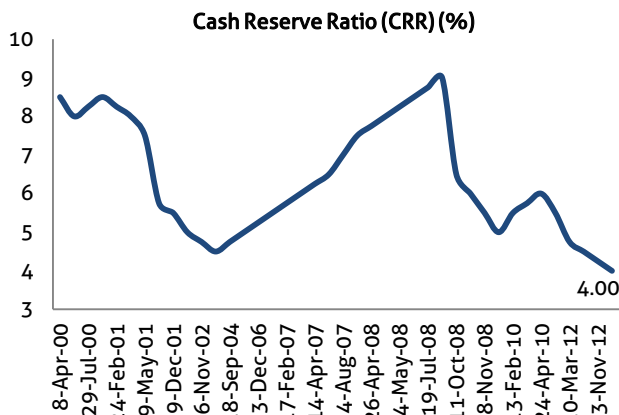
❖ The Indian leather industry is eyeing an opportunity to increase exports to the US and other countries, at a time when Chinese shipments to these markets are becoming more expensive, said senior officials from the Council of Leather Exports (CLE).

❖ Iconic motorcycle brand Royal Enfield on Tuesday launched its on/off-road motorcycle Himalayan. The motorcycle boasts of a single-cylinder air cooled 411 cc engine with a five speed gearbox.

❖ Daimler India Commercial Vehicles Pvt. Ltd. (DICV), the wholly-owned subsidiary of Daimler AG, launched its new generation of BharatBenz medium duty trucks.

❖ Aurobindo Pharma said that it has received final approval from the US health regulator for the generic versions of Levetiracetam injection used for treating epilepsy and anti-arthritis drug Celecoxib.

❖ Homegrown auto major Mahindra & Mahindra said it has completed sale of its entire 71.19% stake in Swaraj Automotives Ltd (SAL) for Rs 24.84 crore to b4S Solutions.



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|---------------------------|---|----------|-------------|-------|
| 2-Feb-16 | Justdial Ltd. | SHAASTRA SECURITIES TRADING PRIVATE LIMITED | SELL | 404145 | 590.4 |
| 2-Feb-16 | Housing Development and I | SHAASTRA SECURITIES TRADING PRIVATE LIMITED | SELL | 2493387 | 72.9 |
| 2-Feb-16 | HeidelbergCement (I) Ltd | FRANKLIN INDIA SMALLER COMPANIES FUND | BUY | 2368515 | 71.5 |
| 2-Feb-16 | Energy Development Compan | GATISHEEL TRADERS LLP | SELL | 1077128 | 44.1 |
| 2-Feb-16 | R.P.P. Infra Projects Ltd | M/S MENTOR CAPITAL LIMITED | BUY | 150704 | 135.0 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|---------------|--|----------|-------------|-------|
| 2-Feb-16 | PRIMAPLA | MOHUR INVESTMENT AND CONSULTANCY PVT LTD | B | 100,000 | 138.8 |
| 2-Feb-16 | BALPHARMA | MICRO INTERNATIONAL | B | 79,932 | 114.2 |
| 2-Feb-16 | POTENTIAL | FMS SECURITIES LIMITED | B | 585,111 | 13.7 |
| 2-Feb-16 | CCFCL | SHAMBHUBHAI RANCHHODBHAI DAKHARA | S | 250,000 | 20.9 |
| 2-Feb-16 | WOMENSNEXT | DHARMENDRA DANSINHBHAI PARMAR | S | 44,000 | 70.1 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|------------|-----------|---------------------------------|-------------|
| 533271 | ASHOKA | 03-Feb-16 | Interim Dividend - Rs. - 0.7000 | 04-Feb-16 |
| 533151 | DBCORP | 03-Feb-16 | Interim Dividend - Rs. - 3.5000 | 04-Feb-16 |
| 532424 | GODREJCP | 03-Feb-16 | Interim Dividend - Rs. - 1.0000 | 04-Feb-16 |
| 532898 | POWERGRID | 03-Feb-16 | Interim Dividend - Rs. - 0.8000 | 04-Feb-16 |
| 534899 | RMFINAFDD1 | 03-Feb-16 | Dividend On Mutual Fund | 04-Feb-16 |
| 534902 | RMFINAFRD1 | 03-Feb-16 | Dividend On Mutual Fund | 04-Feb-16 |
| 500003 | AEGISLOG | 04-Feb-16 | Interim Dividend - Rs. - 0.3000 | 05-Feb-16 |
| 533029 | ALKALI | 04-Feb-16 | Interim Dividend - Rs. - 0.8000 | 05-Feb-16 |
| 500049 | BEL | 04-Feb-16 | Interim Dividend - Rs. - 2.5000 | 05-Feb-16 |
| 533377 | IPRU1117 | 04-Feb-16 | Temporary Suspension | 05-Feb-16 |
| 533379 | IPRU1118P | 04-Feb-16 | Temporary Suspension | 05-Feb-16 |
| 533379 | IPRU1118P | 04-Feb-16 | Dividend On Mutual Fund | 05-Feb-16 |
| 533381 | IPRU1310 | 04-Feb-16 | Temporary Suspension | 05-Feb-16 |
| 533383 | IPRU1311P | 04-Feb-16 | Temporary Suspension | 05-Feb-16 |
| 533383 | IPRU1311P | 04-Feb-16 | Dividend On Mutual Fund | 05-Feb-16 |
| 533380 | IPRU1694 | 04-Feb-16 | Dividend On Mutual Fund | 05-Feb-16 |
| 533380 | IPRU1694 | 04-Feb-16 | Temporary Suspension | 05-Feb-16 |
| 537323 | IPRU8067 | 04-Feb-16 | Temporary Suspension | 05-Feb-16 |
| 536170 | KUSHAL | 04-Feb-16 | Interim Dividend - Rs. - 0.8000 | 05-Feb-16 |
| 517385 | SYMPHONY | 04-Feb-16 | Interim Dividend - Rs. - 5.0000 | 05-Feb-16 |
| 532343 | TVSMOTOR | 04-Feb-16 | Interim Dividend - Rs. - 1.0000 | 06-Feb-16 |
| 531344 | CONCOR | 05-Feb-16 | Interim Dividend - Rs. - 8.0000 | 08-Feb-16 |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|----------|-------|-------------------------------------|--------|----------|----------|
| 1-Feb-16 | CNY | Manufacturing PMI (Jan) | | 49.6 | 49.7 |
| 1-Feb-16 | JPY | Manufacturing PMI (Jan) | | | 52.4 |
| 1-Feb-16 | EUR | Manufacturing PMI (Jan) | | 52.3 | 52.3 |
| 1-Feb-16 | GBP | BoE Consumer Credit (Dec) | | 1.300B | 1.476B |
| 1-Feb-16 | GBP | Manufacturing PMI (Jan) | | 51.8 | 51.9 |
| 1-Feb-16 | GBP | Mortgage Approvals (Dec) | | 69.60K | 70.41K |
| 1-Feb-16 | USD | Core PCE Price Index (MoM) (Dec) | | 0.10% | 0.10% |
| 1-Feb-16 | USD | Personal Income (MoM) (Dec) | | 0.20% | 0.30% |
| 1-Feb-16 | USD | Construction Spending (MoM) (Dec) | | 0.60% | -0.40% |
| 1-Feb-16 | USD | ISM Manufacturing PMI (Jan) | | 48 | 48.2 |
| 2-Feb-16 | GBP | Construction PMI (Jan) | | 57.6 | 57.8 |
| 2-Feb-16 | EUR | PPI (YoY) (Dec) | | -2.90% | -3.20% |
| 2-Feb-16 | EUR | Unemployment Rate (Jan) | | 10.50% | 10.50% |
| 3-Feb-16 | USD | Domestic Truck Sales (Jan) | | 8.15M | 8.34M |
| 3-Feb-16 | EUR | Retail Sales (YoY) (Dec) | | 1.50% | 1.40% |
| 3-Feb-16 | USD | MBA 30-Year Mortgage Rate | | | 4.02% |
| 3-Feb-16 | USD | ADP Nonfarm Employment Change (Jan) | | 195K | 257K |
| 3-Feb-16 | USD | ISM Non-Manufacturing PMI (Jan) | | 55.1 | 55.3 |
| 4-Feb-16 | GBP | BoE QE Total (Feb) | | | 375B |
| 4-Feb-16 | GBP | Interest Rate Decision (Feb) | | 0.50% | 0.50% |
| 4-Feb-16 | USD | Initial Jobless Claims | | | 278K |
| 4-Feb-16 | USD | Nonfarm Productivity (QoQ) (Q4) | | -1.60% | 2.20% |
| 4-Feb-16 | USD | Factory Orders (MoM) (Dec) | | -2.60% | -0.20% |
| 5-Feb-16 | USD | Nonfarm Payrolls (Jan) | | 190K | 292K |
| 5-Feb-16 | USD | Trade Balance (Dec) | | -43.00B | -42.40B |
| 5-Feb-16 | USD | Unemployment Rate (Jan) | | 5.00% | 5.00% |
| 5-Feb-16 | USD | Consumer Credit (Dec) | | 16.00B | 13.95B |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|----------|-------|---------------------------------------|--------|----------|----------|
| 1-Feb-16 | INR | Nikkei Markit Manufacturing PMI (Jan) | | 49.6 | 49.1 |
| 2-Feb-16 | INR | Interest Rate Decision | | 6.80% | 6.75% |
| 3-Feb-16 | INR | Nikkei Services PMI (Jan) | | | 53.6 |
| 3-Feb-16 | INR | M3 Money Supply (2wk) | | | 11.00% |
| 5-Feb-16 | INR | Bank Loan Growth (2wk) | | | 11.30% |
| 5-Feb-16 | INR | Deposit Growth (2wk) | | | 10.90% |

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