

| Equity       | Latest | % Chg  | NSE Sect. Indices          | Latest     | % Chg      |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty        | 8283   | 0.42   | CNX IT                     | 11216      | 0.60       |
| Sensex       | 27499  | 0.35   | BANK NIFTY                 | 18737      | 0.48       |
| DowJones     | 17823  | (0.89) | S&P CNX 500                | 6774       | 0.59       |
| Nasdaq       | 4736   | (0.87) | CNX FMCG                   | 20126      | 0.36       |
| Hangseng     | 23605  | 0.44   | CNX REALTY                 | 4269       | 0.40       |
| Shanghai     | 3235   | 2.18   | CNX AUTO                   | 8281       | (0.25)     |
| Nikkei       | 17451  | (1.57) | CNX ENERGY                 | 8641       | 0.78       |
| Strait Times | 3365   | (0.03) | CNX PHARMA                 | 10950      | 0.78       |
| Kospi        | 1916   | (0.64) | <b>Advances / Declines</b> | <b>BSE</b> | <b>NSE</b> |
| Taiwan       | 9307   | 0.42   | Advances                   | 1692       | 998        |
| FTSE         | 6566   | 0.29   | Declines                   | 1177       | 492        |
| CAC          | 4273   | 0.64   | Unchanged                  | 123        | 72         |
| DAX          | 9806   | (1.22) | Total                      | 2992       | 1562       |

| Nifty Gainers |           |        |
|---------------|-----------|--------|
| Company       | Price(Rs) | Chg(%) |
| BHEL          | 267.00    | 3.35   |
| CAIRN         | 239.95    | 2.13   |
| ULTRACEMCO    | 2675.00   | 1.72   |
| DRREDDY       | 3233.15   | 1.59   |
| DLF           | 137.70    | 1.51   |

| Nifty Losers |           |        |
|--------------|-----------|--------|
| Company      | Price(Rs) | Chg(%) |
| M&M          | 1235.00   | (1.81) |
| BAJAJ-AUTO   | 2430.05   | (1.02) |
| TECHM        | 2593.30   | (0.70) |
| AMBUJACEM    | 228.50    | (0.63) |
| MARUTI       | 3327.20   | (0.60) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| SJVN          | 146.20          | 1.2              | 125              |
| RKFORGE       | 1.64            | 0.1              | 22               |
| ZANDUREALT    | 0.30            | 0.0              | 19               |
| NAUKRI        | 0.93            | 0.1              | 11               |
| BPL           | 18.17           | 2.6              | 7                |

| Indian Forex | Closing | Chg     | % Chg  |
|--------------|---------|---------|--------|
| USD/INR      | 63.332  | (0.418) | (0.66) |
| GBP/INR      | 98.582  | (0.294) | (0.30) |
| EUR/INR      | 77.005  | (0.317) | (0.41) |
| JPY/INR      | 52.930  | (0.070) | (0.13) |

| Precious Metal  | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm)  | 26902   | 135       |
| Silver (Rs/1kg) | 36865   | 440       |

| Commodities      | Price  | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 53.3   | (0.93) |
| Brent (US\$/BBL) | 57.3   | (0.33) |
| Gold (US/oz)     | 1184.1 | (1.55) |
| Silver (US\$/oz) | 15.6   | (4.00) |
| Copper (US\$/MT) | 6359.0 | 0.46   |
| Alum (US\$/MT)   | 1831.5 | (0.19) |
| Zinc(US\$/MT)    | 2167.0 | 1.31   |

| ADR              | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank       | 11.55      | (0.06) |
| HDFC Bank        | 50.75      | 0.07   |
| Infosys          | 31.46      | (0.01) |
| Sterlite Inds.   | 6.22       | 0.00   |
| Dr. Deddy's Labs | 50.45      | 0.43   |
| Wipro            | 11.32      | (0.22) |
| Tata Motors      | 42.28      | (0.39) |

## Market Sensor

US market closed lower in light volume trade on Wednesday, with the major indices erasing gains for December and the Dow below the benchmark 18,000 level. Dow Jones Industrial Average was down 0.89% or 160.00 at 17823.07. Nasdaq Composite was down 0.87% or 41.38 at 4736.06. Standard & Poor's 500 was down 1.03% or 21.45 points at 2058.90.

Indian equity managed to end with the marginal gains and CY14 with over 30% gain. Nifty ended the previous trading session with a gain of 0.42% or 34.45 points at 8282.70. On Wednesday's trading session, FII's bought Rs.481.08 Cr in cash market and bought net Rs.622.53 in derivative segment. Whereas, DII sold net Rs.30.55 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8210 followed by 8180 while resistance exist at 8300 and then at 8350.**

## Global News

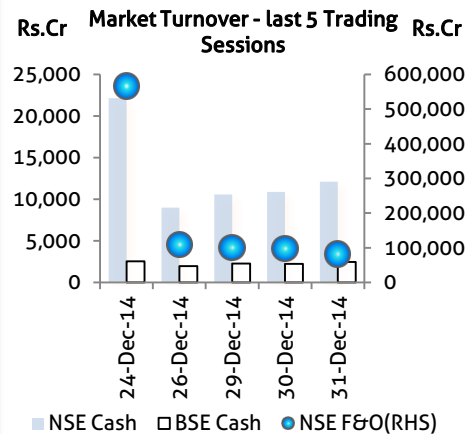
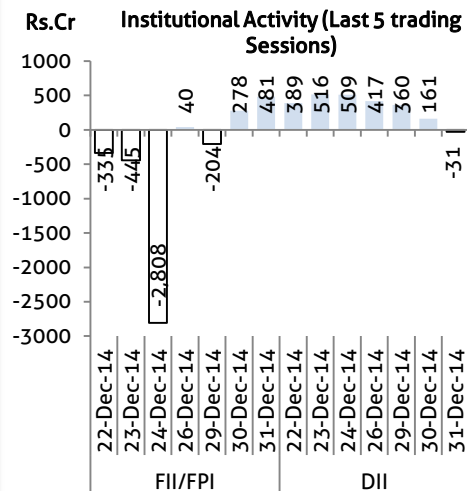
- ❖ Fewer Americans filed applications for unemployment benefits in 2014 than at any time in 14 years as the economic expansion strengthened (Bloomberg)
- ❖ A Chinese manufacturing gauge slipped to the lowest level in 18 months, adding pressure on policy makers to do more to support growth. (Bloomberg)
- ❖ Contracts to purchase previously owned homes rose in November as employment gains and low borrowing costs helped bring potential buyers into the market. (Bloomberg)
- ❖ Russian inflation quickened to the fastest in more than five years after the country's worst currency crisis since 1998 stoked price growth. (Bloomberg)
- ❖ A Chinese factory gauge sank to a seven-month low in December, holding near a preliminary reading and putting pressure on policy makers to provide more support for the world's second-largest economy. (Bloomberg)
- ❖ Business activity in the Chicago area expanded at a slower pace than projected in December as orders and production cooled. (Bloomberg)
- ❖ Singapore's economic growth cooled in 2014 and the nation will experience slower expansion than it's used to, Prime Minister Lee Hsien Loong said. (Bloomberg)

## Economic News

- ❖ Jewellery demand in the domestic market is expected to rise by 10% to \$32 billion in 2015 on the back of improving consumer sentiments, says a report by ICRA.(BS)
- ❖ The Urban Development Ministry has enhanced its housing pool in Delhi by adding 362 flats which were developed by Delhi Development Authority (DDA) during Commonwealth Games. (BS)
- ❖ In a bid to boost India's border road connectivity especially along China, the Border Roads Organisation (BRO) will be entirely brought under the Ministry of Defence by the next budget. (BS)
- ❖ The Coal Ministry said it is working in tandem with the Railway Ministry for expeditious laying of three critical rail lines in three states to transport the dry fuel. (BS)
- ❖ India's total external debt stood at \$455.9 billion at the end of September, up \$13.7 billion or 3.1% from the end of March, the finance ministry said in a statement on Wednesday. (BS)
- ❖ The monitoring system will be unveiled to give a big push to Swachh Bharat Mission, which aims at attaining a 100 percent open defecation free India by 2019, a ministry statement said. (BS)
- ❖ The government is open to reviewing all cases of blacklisted defence firms on merit and has partially lifted a ban on Tatra trucks as it prepares a new policy that will allow foreign defence firms to legally hire agents, Defence Minister Manohar Parrikar said. (BS)
- ❖ Living up to its traditional image of being a land of farmers, India has achieved a record production for a number of crops including wheat, rice, pulses and cotton in 2014, but agriculture sector may not be able to repeat this performance in new year due to poor monsoon. (BS)
- ❖ After a sluggish 2014 marked with falling housing sales and high costs, developers are betting on lower borrowing costs and economic upturn for a turnaround in the real estate market in the new year. (BS)
- ❖ Consumption of petroleum products in the country has shown a 5 per cent rebound in November after a 0.8 per cent decline in the previous month. (BS)
- ❖ It so happened in 2014 that inflation hit a perfect-zero for wholesale prices and the retail one also more than halved to 4.4%, still it was not good enough for the much-awaited cut in interest rates. (BS)
- ❖ After a failed winter session of Parliament, the government recommended promulgating an ordinance for changes to the Right to Fair Compensation and Transparency in Land Acquisition, Rehabilitation and Resettlement Act, 2013. (BS)

| Global Forex | Closing | Chg    | % Chg |
|--------------|---------|--------|-------|
| EUR-USD      | 1.2104  | 0.0006 | 0.05  |
| GBP-USD      | 1.5583  | 0.0006 | 0.04  |
| USD-JPY      | 119.78  | 0.00   | 0.00  |

| Bond Markets   | Closing | Chg       |
|----------------|---------|-----------|
| 10-yr bond     | 7.94    | -4.80 bps |
| Interbank call | 8.91    | 55.91 bps |



## Domestic News

- ❖ Website of Indian Oil Corp, the nation's largest company, was hacked purportedly by a Turkish group.(BS)
- ❖ Slow implementation of power generation projects has impacted nine out of 13 transmission projects of PowerGrid planned to be commissioned in FY15. (BS)
- ❖ Glenmark Pharmaceuticals has received shareholders' nod to raise up to \$300 million (around Rs 1,890 crore) through issue of securities. (BS)
- ❖ Korean auto major Hyundai has posted record sales of over 4.1 lakh units in India in 2014, a growth of over 7.5% riding on new launches, including compact sedan Xcent and premium hatchback Elite i20. (BS)

## Domestic News (Cont...)

❖ From giants like Reliance Industries and DLF to little-known entities selling jatropa plants as money-multiplier investments, all faced the music in 2014 when an empowered Sebi took them to task for manipulating markets, defrauding investors or hiding market-sensitive information. (BS)

❖ Indian industry has been witnessing an improved operating environment in the current fiscal on account of better macroeconomic factors, led by government's reforms and a likelihood of further pick-up in growth, says a report. (BS)

❖ Fifth round of talks between the Union, representing Foxconn workers, and the management of the Taiwan company has failed. The talks were held in front of the Assistant Labour Commissioner at Sriperumbudur, on the outskirts of Chennai, where the company's facility is located. (BS)

❖ Tata group Chairman Cyrus Mistry said the Modi government's 'Make in India' campaign holds the "promise of re-igniting growth in the years to come". (BS)

❖ Hyundai Motor India Ltd (HMIL) said that 2014 has been an excellent year for the company and it achieved the highest market share of 21.6% for the first time in India. The Korean automajor's Indian arm also said it has surpassed its target of selling 4 lakh vehicles in the domestic market. (BS)

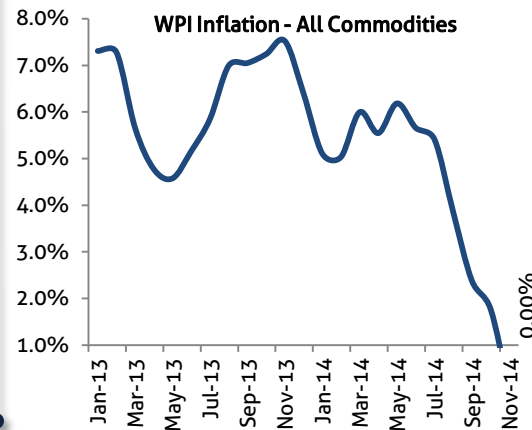
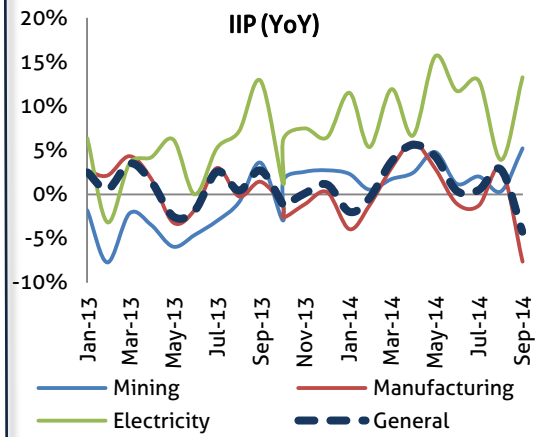
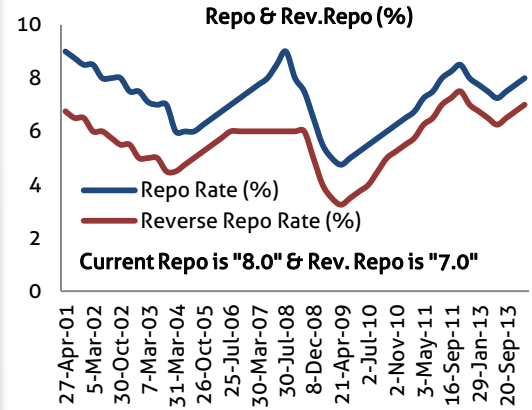
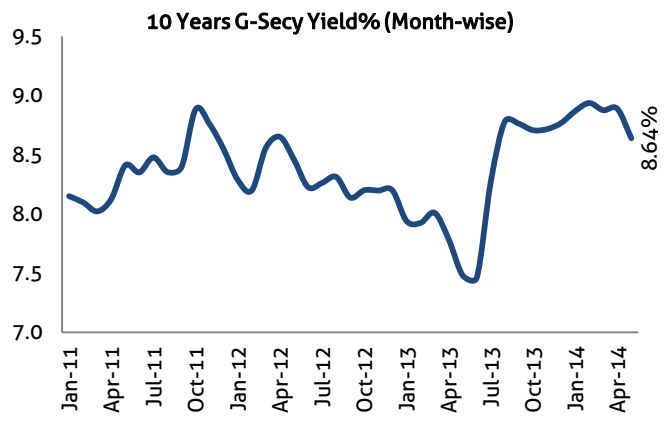
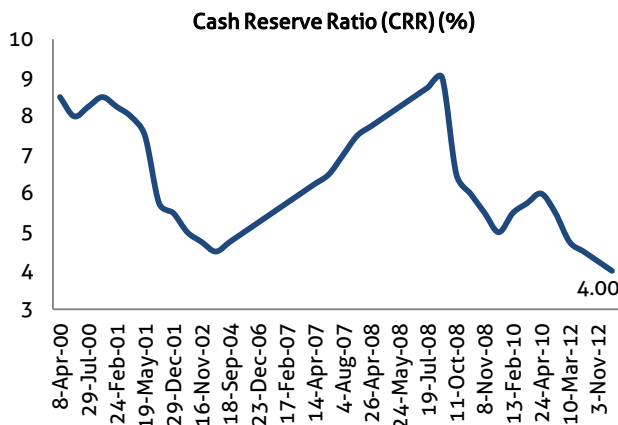
❖ Singapore's Ascendas India Trust will invest Rs 600 crore over two years in Indian real estate company Paranjape Schemes (Construction) Ltd, the property developer said on Wednesday. (BS)

❖ Auto majors say car prices will rise after the government failed to extend excise relief for car manufacturers. (BS)

❖ The Delhi Transport Authority will come out with a final order concerning the ban on Uber by January 5. The authority, which is acting as a quasi-judicial body, will pass orders after satisfying itself with the company's response. The order, if in favour of Uber, could mark its return in the Capital. (BS)

❖ LIC Housing Finance has taken possession of Orbit Corporation's 25,670-square feet property in Lower Parel area of Mumbai after it defaulted on its loan. (BS)

❖ Shriram Properties will continue to focus on residential development in South India instead of aiming to be a pan-India player. (BS)



## Bulk Deal - NSE

| Date      | Security Name             | Client Name  | Buy/Sell | Traded Qty. | Price |
|-----------|---------------------------|--|----------|-------------|-------|
| 31-Dec-14 | Shanthy Gears Ltd         | SUNDARAM BNP PARIBAS MUTUAL FUND A/C<br>SUNDARAM GROWTH FUND | SELL     | 504656      | 132.2 |
| 31-Dec-14 | Monte Carlo Fashions Ltd. | N.K. SECURITIES  | SELL     | 119123      | 540.7 |
| 31-Dec-14 | Ramkrishna Forgings Ltd   | WAYZATA II INDIAN OCEAN LIMITED                              | SELL     | 138926      | 325.2 |
| 31-Dec-14 | Manaksia Limited          | S A K DEALERS PRIVATE LIMITED                                | SELL     | 400000      | 55.5  |
| 31-Dec-14 | Sarla Performance Fibers  | HDFC MUTUAL FUND   | BUY      | 43817       | 418.0 |

## Bulk Deal - BSE

| Date      | Security Name | Client Name                     | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|---------------------------------|----------|-------------|-------|
| 31-Dec-14 | EDELWEISS     | CALADIUM INVESTMENT PTE LTD     | S        | 12,971,517  | 55.0  |
| 31-Dec-14 | ATULAUTO      | ANITA NIRAJBHAI CHANDRA         | S        | 300,000     | 610.3 |
| 31-Dec-14 | ADHUNIKIND    | VRINDAVAN ADVISORY SERVICES LLP | B        | 500,000     | 118.0 |
| 31-Dec-14 | AUSTENG       | ZAKI ABBAS NASSER               | B        | 70,000      | 95.6  |
| 31-Dec-14 | DELTALTD      | ANIL KUMAR                      | B        | 65,526      | 86.7  |

## Corporate Actions

| Scrip Code | Scrip Name  | Ex-Date   | Purpose                            | Record Date |
|------------|-------------|-----------|------------------------------------|-------------|
| 511092     | JMDTELEFILM | 01-Jan-15 | BONUS 1:1                          | 02-Jan-15   |
| 526161     | SPENTA      | 01-Jan-15 | Buy Back of Shares                 | 02-Jan-15   |
| 500164     | GODREJIND   | 05-Jan-15 | Scheme of Arrangement              | 06-Jan-15   |
| 533892     | IPRU1855    | 05-Jan-15 | Redemption of Mutual Fund          | -           |
| 533893     | IPRU1856    | 05-Jan-15 | Redemption of Mutual Fund          | -           |
| 519035     | WADALACOM   | 05-Jan-15 | Amalgamation                       | 06-Jan-15   |
| 533162     | HATHWAY     | 06-Jan-15 | Stock Split from Rs.10/- to Rs.2/- | 07-Jan-15   |
| 534839     | EFPL        | 08-Jan-15 | Stock Split from Rs.10/- to Re.1/- | 09-Jan-15   |
| 537235     | TFM45DA     | 12-Jan-15 | Dividend On Mutual Fund            | 13-Jan-15   |
| 537235     | TFM45DA     | 12-Jan-15 | Redemption of Mutual Fund          | 13-Jan-15   |
| 537236     | TFM45DB     | 12-Jan-15 | Redemption of Mutual Fund          | 13-Jan-15   |
| 537237     | TFM45DD     | 12-Jan-15 | Redemption of Mutual Fund          | 13-Jan-15   |
| 500550     | SIEMENS     | 14-Jan-15 | Dividend - Rs.6.00                 | -           |
| 532134     | BANKBARODA  | 22-Jan-15 | Stock Split from Rs.10/- to Rs.2/- | 23-Jan-15   |
| 532179     | CORPBANK    | 22-Jan-15 | Stock Split from Rs.10/- to Rs.2/- | 23-Jan-15   |
| 537390     | TFM46IB     | 27-Jan-15 | Redemption of Mutual Fund          | 28-Jan-15   |
| 537389     | TFM46IC     | 27-Jan-15 | Dividend On Mutual Fund            | 28-Jan-15   |
| 537389     | TFM46IC     | 27-Jan-15 | Redemption of Mutual Fund          | 28-Jan-15   |
| 537391     | TFM46ID     | 27-Jan-15 | Redemption of Mutual Fund          | 28-Jan-15   |
|            |             |           |                                    |             |
|            |             |           |                                    |             |

## Global Economic Calendar

| Date      | Curr. | Event                                      | Actual | Forecast | Previous |
|-----------|-------|--|--------|----------|----------|
| 29-Dec-14 | USD   | Dallas Fed Mfg Business Index (Dec)        |        |          | 10.5     |
| 30-Dec-14 | GBP   | Nationwide HPI (MoM) (Dec)                 |        | 0.30%    | 0.30%    |
| 30-Dec-14 | EUR   | Private Loans (YoY) (Nov)                  |        | -1.00%   | -1.10%   |
| 30-Dec-14 | USD   | S&P/CS HPI Composite - 20 s.a. (MoM) (Oct) |        | 0.50%    | 0.30%    |
| 30-Dec-14 | USD   | CB Consumer Confidence (Dec)               |        | 93.1     | 88.7     |
| 31-Dec-14 | USD   | MBA 30-Year Mortgage Rate                  |        |          | 4.02%    |
| 31-Dec-14 | USD   | Continuing Jobless Claims                  |        | 2,360K   | 2,403K   |
| 31-Dec-14 | USD   | Initial Jobless Claims                     |        | 288K     | 280K     |
| 31-Dec-14 | USD   | Chicago PMI (Dec)                          |        | 60.2     | 60.8     |
| 31-Dec-14 | USD   | Pending Home Sales (MoM) (Nov)             |        | 0.60%    | -1.10%   |
| 02-Jan-15 | CNY   | HSBC Manufacturing PMI (Dec)               |        |          | 49.5     |
| 02-Jan-15 | EUR   | Manufacturing PMI (Dec)                    |        | 50.8     | 50.8     |
| 02-Jan-15 | GBP   | Manufacturing PMI (Dec)                    |        | 53.6     | 53.5     |
| 02-Jan-15 | GBP   | BoE Consumer Credit (Nov)                  |        | 1.090B   | 1.087B   |
| 02-Jan-15 | GBP   | Mortgage Approvals (Nov)                   |        | 58.52K   | 59.43K   |
| 02-Jan-15 | GBP   | Mortgage Lending (Nov)                     |        | 1.50B    | 1.50B    |
| 02-Jan-15 | USD   | Manufacturing PMI (Dec)                    |        |          | 53.7     |
| 02-Jan-15 | USD   | Construction Spending (MoM) (Nov)          |        | 0.30%    | 1.10%    |
| 02-Jan-15 | USD   | ISM Manufacturing PMI (Dec)                |        | 57.6     | 58.7     |

## Indian Economic Calendar

| Date      | Curr. | Event                               | Actual | Forecast | Previous  |
|-----------|-------|-------------------------------------|--------|----------|-----------|
| 31-Dec-14 | INR   | Federal Fiscal Deficit (Nov)        |        |          | 4,757.51B |
| 31-Dec-14 | INR   | Foreign Debt (USD) (Q3)             |        |          | 450.1B    |
| 02-Jan-15 | INR   | HSBC Markit Manufacturing PMI (Dec) |        | 51.5     | 53.3      |

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