

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7971	0.00	CNX IT	11606	0.15
Sensex	26283	(0.41)	BANK NIFTY	17147	(0.38)
DowJones	16528	(0.69)	S&P CNX 500	6669	(0.37)
Nasdaq	4777	(1.07)	CNX FMCG	20112	(0.31)
Hangseng	21475	(0.90)	CNX REALTY	3122	(0.13)
Shanghai	3089	(3.65)	CNX AUTO	7949	(0.93)
Nikkei	18440	(2.38)	CNX ENERGY	7646	(1.07)
Strait Times	2906	(0.57)	CNX PHARMA	3564	(0.70)
Kospi	1921	(1.05)	Advances / Declines	BSE	NSE
Taiwan	8042	(1.62)	Advances	1141	660
FTSE	6248	0.90	Declines	1523	827
CAC	4653	(0.47)	Unchanged	111	66
DAX	10259	(0.38)	Total	2775	1553

Nifty Gainers		
Company	Price(Rs)	Chg(%)
CIPLA	684.00	3.66
LUPIN	1925.00	3.45
DRREDDY	4298.25	2.81
GAIL	297.00	2.75
BPCL	883.95	2.67

Nifty Losers		
Company	Price(Rs)	Chg(%)
BHEL	226.05	(3.64)
POWERGRID	130.40	(3.51)
BHARTIARTL	354.05	(2.33)
ULTRACEMCO	2882.55	(2.18)
ACC	1333.30	(2.16)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
SKFINDIA	1.07	0.1	7
LAXMIMACH	0.45	0.1	7
UFO	0.95	0.2	6
KGL	246.02	56.5	4
ASTEC	3.93	0.9	4

Indian Forex	Closing	Chg	% Chg
USD/INR	66.306	0.225	0.34
GBP/INR	102.311	0.388	0.38
EUR/INR	74.495	0.128	0.17
JPY/INR	54.750	0.210	0.39

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26448	113
Silver (Rs/1kg)	34410	322

Commodities	Price	% Chg.
Crude (US\$/BBL)	47.7	7.14
Brent (US\$/BBL)	52.7	7.14
Gold (US/oz)	1139.1	0.52
Silver (US\$/oz)	14.6	0.90
Copper (US\$/MT)	5095.0	0.00
Alum (US\$/MT)	1550.0	0.00
Zinc(US\$/MT)	1793.0	0.00

ADR	Cl. Values	% Chg.
ICICI Bank	8.72	(0.15)
HDFC Bank	56.99	(1.40)
Infosys	17.15	(0.36)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	65.07	1.21
Wipro	11.71	(0.12)
Tata Motors	25.32	(0.33)

Market Sensor

US market closed lower on Monday, the last day of trade for August, as investors digested a volatile month amid continued uncertainty about China and the Fed. Dow Jones Industrial Average was down 0.69% or 114.98 points at 16528.03. Nasdaq Composite was down 1.07% or 51.82 points at 4776.51. Standard & Poor's 500 was down 0.84% or 16.69 points at 1972.18.

Indian equity market closed lower on the back of weak global market and rising USDINR. Brent crude too gained over 10% in the last two days. Capital Goods, Auto, FMCG stocks declined. Pharma, select Banks and Oil & gas stocks gained. Nifty ended the previous day with a decline of 0.38% or 30.65 points at 7971.30. On Monday's trading session, FIIs sold net Rs.551.19 Cr in cash market and bought net Rs.2654.27 in derivative segment. Whereas, DII bought net Rs.478.59 Cr in cash segment.

Global News

❖ U.S. inflation will likely rebound as pressure from the dollar fades, allowing the Federal Reserve to raise interest rates gradually, Fed Vice Chairman Stanley Fischer said on Saturday in a speech careful not to overreact to a possible Chinese slowdown. (CNBC)

❖ Investors will look for a safe haven amid the recent volatility in U.S. bonds, a move that will send the 10-year note yield down to about 1.75 percent, Mark Grant, managing director at Southwest Securities, said Monday. (CNBC)

❖ Political stability and the successful recapitalisation of Greek banks are needed before Greece can lift capital controls imposed in June to avert a financial meltdown, the chairman of Greek lender Eurobank (EURBr.AT) said on Monday. (CNBC)

❖ China's central bank will require banks trading currency forwards on behalf of clients to set aside 20 percent in foreign exchange reserves starting Oct. 15, sources with direct knowledge of the matter said on Tuesday. (Reuters)

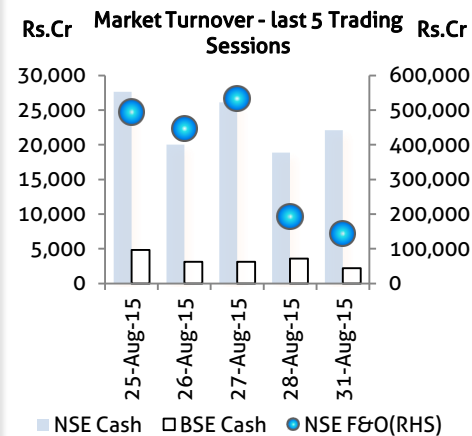
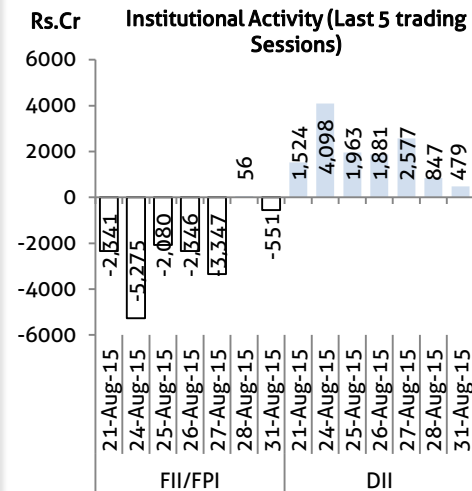
❖ With low price inflation serving as a reminder of the euro zone's delicate health, the European Central Bank is having to reassure market investors that it can do yet more to help the economy. (Reuters)

Economic News

- ❖ Finance Minister Arun Jaitley on Monday said the annual revision of pension as demanded by the One Rank One Pension (OROP) protestors is not possible, but assured that Centre would safeguard the interests of the defence personnel retiring at an early age. (BS)
- ❖ Former additional secretary and financial advisor to the department of agriculture & cooperation, Raghav Chandradas taken over as Chairman, National Highways Authority of India. (BS)
- ❖ Infrastructure sector growth slowed to 3-month low of 1.1 per cent in July as output of crude oil, natural gas and steel contracted, making a case for a further rate cut by the Reserve Bank. (BS)
- ❖ India's annual infrastructure output growth slowed to a three-month low of 1.1 percent in July, dragged down by a contraction in steel production and a slowdown in output of coal and refinery products, government data showed on Monday. (BS)
- ❖ India's fiscal deficit was Rs 3.85 lakh crore (\$57.93 billion) during April-July, or 69.3 percent of the full-year target, government data showed on Monday. (BS)
- ❖ Finance Minister Arun Jaitley said the decision to let the land acquisition ordinance to lapse is not a setback for the government and the alternative route adopted by the Centre will provide greater flexibility to the states to deal with the issue. (BS)
- ❖ After scrapping product approval process following court orders, including the Maggi case, food safety regulator FSSAI has invited legal firms to help frame new norms for approvals. (BS)
- ❖ The government is in the process of framing regulations for exploration and mining in offshore blocks, which contain minerals such as zirconium, titanium, thorium, tungsten and rare earth elements. (BS)
- ❖ Kharif foodgrain production may fall below last year's level of 126.31 million tonnes if crucial September rains are not well distributed, the government's premier agri-research body IARI said. (BS)
- ❖ Easy exit options for completed road projects will release Rs 4,000 crore to developers, which can be ploughed back in infrastructure projects or used to retire debt, India Ratings and Research (Ind-Ra) said. (BS)
- ❖ Pushing for interest rate cut, Finance Minister Arun Jaitley on Monday said that inflation is under control while oil and commodity prices are also low and expressed hope that RBI will consider all these factors in its monetary policy review. (BS)
- ❖ The Gujarat government is planning to launch a comprehensive scheme to help state-based Micro, Small and Medium Enterprises (MSMEs) reduce their energy consumption as well as carbon footprint using latest technologies in conservation. (BS)
- ❖ For investors worried about the health of emerging economies, India's gross domestic product data for April-June should supply some cheer on Monday - the country is expected to remain the fastest growing major economy for a second straight quarter. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1268	0.0054	0.48
GBP-USD	1.5399	0.0054	0.35
USD-JPY	120.75	(0.4800)	(0.40)

Bond Markets	Closing	Chg
10-yr bond	7.91	0.50 bps
Interbank call	7.13	4.36 bps



Domestic News

- ❖ Global technology major IBM on Monday said that India Software Lab (ISL), its product development centre in India, is developing solutions with an aim of contributing to the Digital India programme, in multiple areas. (BS)

Domestic News (Cont...)

❖ Wyeth, part of global pharma major Pfizer now, has received a favourable order for a patent application on its Tigecycline Composition, an antibiotic drug, against pre-grant opposition from Natco Pharma and Lupin Ltd. (BS)

❖ As part of its endeavour to provide low cost and comprehensive eye care services in rural and tribal pockets, LV Prasad Eye Institute (LVPEI) on Sunday opened its 14th secondary eye care centre at Rayagada. (BS)

❖ Mobile internet tariff plans hike announced by telecom operators such as Idea and Airtel for pre-paid and post-paid consumers may not necessarily lead to revenue growth because several layers of schemes and plans dilutes headline rate, analysts tracking the sector commented. (BS)

❖ Waking up to acute raw material crisis faced by Vedanta to run its Lanjigarh alumina refinery, the state government has decided to push aluminium producers like National Aluminium Company (Nalco) and Aditya Birla Group promoted Hindalco Industries to make arrangements for interim bauxite supplies. (BS)

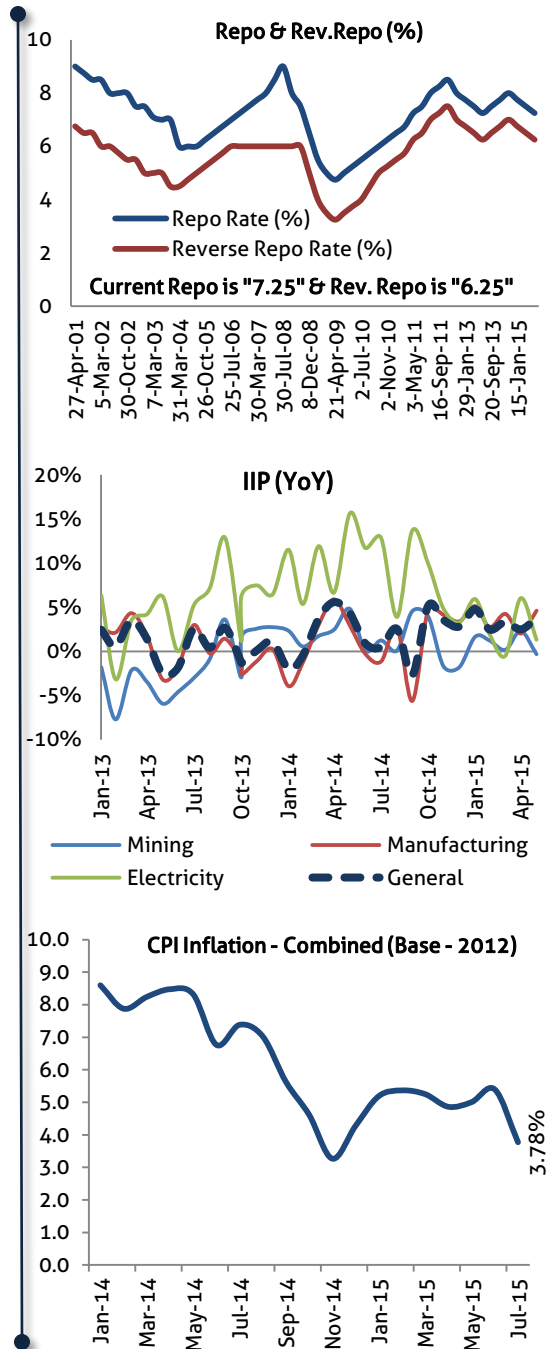
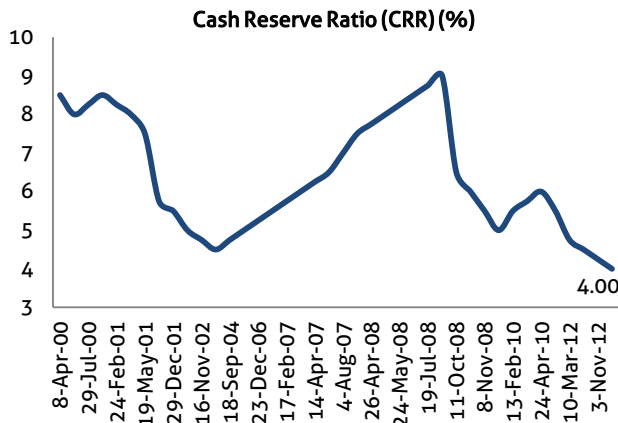
❖ Kellton Tech Solutions Limited, a Hyderabad-based IT services and solutions company, is planning to raise \$15 million (around Rs 99 crore) from the domestic markets through a qualified institutional placement (QIP) by November this year. (BS)

❖ Film studio and distribution company Eros International Media has tied up with Excel Entertainment for the worldwide release of Rock On 2. (BS)

❖ Reverie Language Technologies, a Bengaluru-based local language technologies provider, raised \$4 million in series A investments from Aspada Investment Company and Qualcomm Ventures. (BS)

❖ India's healthcare sector is expected to be \$280 billion in size by 2020, growing at a compound annual growth rate of 16 per cent, but it is in "dire need" of right policy framework and infrastructure push, says a FICCI-KPMG report. (BS)

❖ Allergic to dairy products? Now, start your day with a glass of lactose-free milk from Amul. India's largest dairy cooperative Gujarat Cooperative Milk Marketing Federation (GCMMF) is all set to launch India's first branded lactose-free milk in a month. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
31-Aug-15	Glenmark Pharma Ltd	DB INTERNATIONAL ASIA LIMITED	SELL	2229553	1154.5
31-Aug-15	Indiabulls Hsg Fin Ltd	DB INTERNATIONAL ASIA LIMITED	SELL	3179376	755.0
31-Aug-15	Jindal Steel & Power	DB INTERNATIONAL ASIA LIMITED	BUY	6434034	67.6
31-Aug-15	Housing Development and I	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	SELL	2199358	60.1
31-Aug-15	Uniphos Enterprises Limit	VINOD MOHAN NAIR	SELL	3000000	38.0

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
31-Aug-15	GNRL	AFFLUENCE GEMS PRIVATE LIMITED	B	221,491	81.6
31-Aug-15	KDDL	KITARA INDIA MICRO CAP GROWTH FUND	B	50,000	280.0
31-Aug-15	INDIANVSH	SUHANI HOMES PRIVATE LIMITED	B	270,430	42.8
31-Aug-15	KGL	JMP SECURITIES PVT LTD	S	4,475,410	2.1
31-Aug-15	KAVVERITEL	AFFLUENCE FINCON SERVICE PRIVATE LIMITED	B	179,000	16.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
531847	ASTAR	01-Sep-15	Dividend - Rs. - 1.5000	-
526783	DRAGARW	01-Sep-15	Dividend - Rs. - 1.2000	-
533353	IPRU1073	01-Sep-15	Temporary Suspension	02-Sep-15
533355	IPRU1074P	01-Sep-15	Temporary Suspension	02-Sep-15
533357	IPRU1304	01-Sep-15	Temporary Suspension	02-Sep-15
533359	IPRU1305P	01-Sep-15	Temporary Suspension	02-Sep-15
533356	IPRU1688	01-Sep-15	Temporary Suspension	02-Sep-15
533360	IPRU1689	01-Sep-15	Temporary Suspension	02-Sep-15
535031	IPRU8063	01-Sep-15	Temporary Suspension	02-Sep-15
535032	IPRU8064	01-Sep-15	Temporary Suspension	02-Sep-15
535033	IPRU8117	01-Sep-15	Temporary Suspension	02-Sep-15
533519	L&TFH	01-Sep-15	Dividend - Rs. - 0.8000	-
590075	LAMBODHARA	01-Sep-15	Dividend - Rs. - 1.5000	-
500510	LT	01-Sep-15	Dividend - Rs. - 16.2500	-
534369	TBZ	01-Sep-15	Dividend - Rs. - 1.0000	-
500303	ABIRLANUVO	02-Sep-15	Dividend - Rs. - 7.0000	-
533221	AHLWEST	02-Sep-15	Dividend - Rs. - 1.0000	-
521220	DAMOTH	02-Sep-15	Bonus issue 1:4	03-Sep-15
530001	GUJALKALI	02-Sep-15	Dividend - Rs. - 4.5000	-
500104	HINDPETRO	02-Sep-15	Final Dividend - Rs. - 24.5000	-
500250	LGBBROSLTD	02-Sep-15	Final Dividend - Rs. - 3.8000	-
590078	MAITHANALL	02-Sep-15	Dividend - Rs. - 2.0000	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
31-Aug-15	JPY	Industrial Production (MoM) (Jul)		0.10%	1.10%
31-Aug-15	JPY	Housing Starts (YoY) (Jul)		11.00%	16.30%
31-Aug-15	EUR	CPI (YoY) (Aug)		0.10%	0.20%
31-Aug-15	USD	Chicago PMI (Aug)		54.5	54.7
31-Aug-15	USD	Dallas Fed Mfg Business Index (Aug)			-4.6
1-Sep-15	CNY	Manufacturing PMI (Aug)		49.7	50
1-Sep-15	JPY	Manufacturing PMI (Aug)			51.9
1-Sep-15	EUR	Manufacturing PMI (Aug)		52.4	52.4
1-Sep-15	GBP	BoE Consumer Credit (Jul)			1.220B
1-Sep-15	GBP	Manufacturing PMI (Aug)		51.9	
1-Sep-15	GBP	Mortgage Approvals (Jul)		67.90K	66.58K
1-Sep-15	EUR	Unemployment Rate (Jul)		11.10%	11.10%
1-Sep-15	USD	Manufacturing PMI (Aug)			52.9
1-Sep-15	USD	Construction Spending (MoM) (Jul)		0.50%	0.10%
1-Sep-15	USD	ISM Manufacturing PMI (Aug)		53	
2-Sep-15	EUR	PPI (YoY) (Jul)		-2.00%	-2.20%
2-Sep-15	USD	MBA 30-Year Mortgage Rate			4.08%
2-Sep-15	USD	ADP Nonfarm Employment Change (Aug)		205K	
2-Sep-15	USD	Nonfarm Productivity (QoQ) (Q2)		2.30%	1.30%
2-Sep-15	USD	Factory Orders (MoM) (Jul)		0.10%	
3-Sep-15	EUR	Retail Sales (MoM) (Jul)		0.60%	-0.60%
3-Sep-15	USD	Challenger Job Cuts (Aug)			
3-Sep-15	EUR	Interest Rate Decision (Sep)			0.05%
3-Sep-15	USD	Trade Balance (Jul)		-42.00B	
3-Sep-15	USD	Initial Jobless Claims			
3-Sep-15	USD	ISM Non-Manufacturing PMI (Aug)		58.5	
4-Sep-15	EUR	GDP (YoY) (Q2)		1.20%	1.20%
4-Sep-15	USD	Nonfarm Payrolls (Aug)		214K	
4-Sep-15	USD	Private Nonfarm Payrolls (Aug)		208K	
4-Sep-15	USD	Unemployment Rate (Aug)		5.20%	

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
31-Aug-15	INR	Infrastructure Output (YoY) (Jul)			3.00%
31-Aug-15	INR	GDP Quarterly (YoY) (Q1)		7.40%	7.50%
1-Sep-15	INR	Nikkei Market Manufacturing PMI (Aug)			
2-Sep-15	INR	M3 Money Supply (2wk)			10.90%
4-Sep-15	INR	Bank Loan Growth (2wk)			9.40%
4-Sep-15	INR	Deposit Growth (2wk)			11.50%

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