

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7635	0.31	CNX IT	9803	(1.10)
Sensex	25516	0.40	BANK NIFTY	15321	0.52
DowJones	16956	0.77	S&P CNX 500	6200	0.42
Nasdaq	4459	1.14	CNX FMCG	17495	0.35
Hangseng	23427	1.02	CNX REALTY	3864	(0.31)
Shanghai	2054	0.17	CNX AUTO	6989	3.16
Nikkei	15406	0.52	CNX ENERGY	9916	(0.53)
Strait Times	3260	0.54	CNX PHARMA	8497	(0.46)
Kospi	2015	0.78	Advances / Declines	BSE	NSE
Taiwan	9530	0.94	Advances	1894	995
FTSE	6803	0.87	Declines	1155	531
CAC	4461	0.87	Unchanged	110	56
DAX	9902	0.71	Total	3159	1582

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HINDALCO	175.10	6.64
MARUTI	2582.50	5.87
TATAMOTORS	452.70	4.96
M&M	1194.75	4.14
TATASTEEL	541.25	2.43

Nifty Losers		
Company	Price(Rs)	Chg(%)
TECHM	2110.00	(1.95)
BPCL	589.00	(1.90)
ASIANPAINT	584.00	(1.68)
WIPRO	538.00	(1.54)
TCS	2391.30	(1.41)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Supreme Inds	5.10	0.1	93
Bharti Infratel	39.94	1.3	31
MM Forgings-\$	2.84	0.1	29
Gujarat Fluo	3.24	0.1	25
FDC	10.67	0.5	23

Indian Forex	Closing	Chg	% Chg
USD/INR	60.137	0.044	0.07
GBP/INR	102.834	0.507	0.50
EUR/INR	82.283	0.274	0.33
JPY/INR	59.270	(0.010)	(0.02)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28200	100
Silver (Rs/1kg)	44450	295

Commodities	Price	% Chg.
Crude (US\$/BBL)	105.4	(0.20)
Brent (US\$/BBL)	112.2	(0.25)
Gold (US/oz)	1325.9	(0.23)
Silver (US\$/oz)	21.1	(0.24)
Copper (US\$/MT)	7015.0	0.86
Alum (US\$/MT)	1837.5	(0.68)
Zinc(US\$/MT)	2194.0	(0.48)

ADR	Cl. Values	% Chg.
ICICI Bank	49.98	0.85
HDFC Bank	48.41	1.59
Infosys	53.75	(0.02)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	43.59	0.44
Wipro	12.02	0.13
Tata Motors	40.47	1.41

Market Sensor

US market jumped on Tuesday as Wall Street started the second half of the year with the Dow rising to within two points of 17,000, as data showed expansion in U.S. manufacturing and better-than-expected sales for major U.S. automakers. Dow Jones Industrial Average was up 0.77% or 129.47 points at 16956.07. Nasdaq Composite was up 1.14% or 50.47 points at 4458.65. Standard & Poor's 500 was up 0.67% or 13.09 points at 1973.32.

Indian Equity market gained on the back of strong auto numbers and upgrades by FII brokerages. Nifty ended the previous trading session with a gain of 0.31% or 23.35 points at 7634.70. On Tuesday's trading session, FIIs bought net Rs.856.35 Cr in cash market and bought net Rs.999.92 in derivative segment. Whereas, DII sold net Rs.774.66 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7610 followed by 7580 while resistance is seen at 7710 followed by 7750.

Global News

❖ American factories, propelled by the strongest orders of the year, sustained gains in June and are poised to be part of the rebound in economic growth. The Institute for Supply Management's manufacturing index was 55.3 last month. (Bloomberg)

❖ Property developers in two of China's weakest housing markets are offering to buy back homes above the purchase price to boost sales as demand slows. (Bloomberg)

❖ Japanese companies forecast sustained price gains, providing support for the Bank of Japan's campaign to generate stable inflation. Firms forecast inflation of 1.5 percent in a year. (Bloomberg)

❖ U.K. manufacturing growth unexpectedly accelerated to the fastest pace in seven months as demand surged, adding to signs of a broadening recovery. An industry index rose to 57.5 in June from 57 in May. (Bloomberg)

❖ China's Premier Li Keqiang has promised to cut credit while also meeting a 7.5 percent economic growth target. Record bond sales last quarter show which pledge he's prioritizing. (Bloomberg)

Economic News

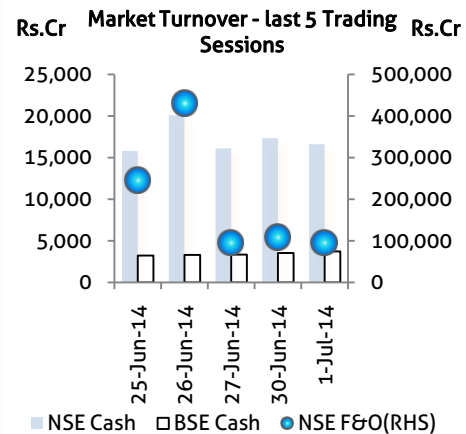
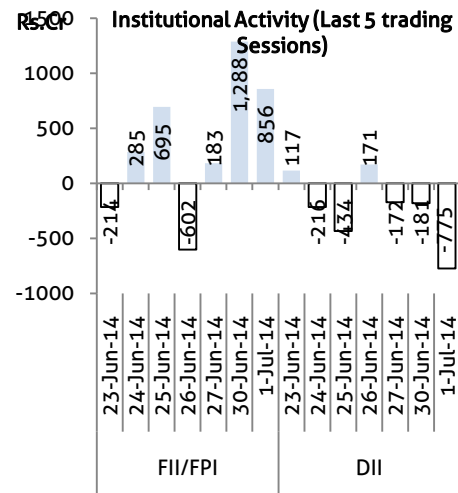
- ❖ Fourteen months after the Supreme Court allowed mining in all categories of iron ore mines in Karnataka, production is slowly gathering pace. As regulatory bodies are moving slowly in granting approvals, so far, only 23 mines have restarted operations, with combined annual production of 21-22 million tonnes (mt). (BS)
- ❖ Allahabad High Court issued notices to the Centre over Uttar Pradesh sugarcane arrears, which currently stand at over Rs 7,000 crore. (BS)
- ❖ France has proposed giving India a 1 billion euro credit line for sustainable and urban development in the country over the next three years, France Foreign Minister Laurent Fabius said here on Tuesday. (BS)
- ❖ Despite having to cope with global factors, a weak start to the monsoon and "legacy" problems, the government is planning the "right mix of policy changes" to provide long-term relief from inflation, Union Minister Prakash Javadekar said. (BS)
- ❖ A US-based Indian economist has said the new Indian government has made a good start on the economy front in the first 30 days even as it has a long way to go. (BS)
- ❖ Former PMEAC chief C Rangarajan has submitted the report on Tendulkar Committee methodology for estimating poverty to Planning Minister Rao Inderjit Singh. (BS)
- ❖ Manufacturing activity rose to a four-month high in June, albeit the pick-up was too gradual, shows a widely-tracked HSBC purchasing managers' index (PMI). The Food Ministry has sought approval to end the subsidy for raw sugar exports one year earlier as it is being availed only by a few sugar mills, a senior government official said. (BS)
- ❖ Jet fuel price has risen 0.5% increasing input costs for already struggling domestic airlines. State-run oil marketing companies revised aviation turbine fuel price on Monday night as crisis in Iraq led to a spike in crude oil price. (BS)
- ❖ Price of non-subsidised cooking gas (LPG) was hiked by Rs 16.50 per cylinder and that of jet fuel by over half-a-per cent after international oil prices surged due to the ongoing Iraq crisis. (BS)
- ❖ India's manufacturing sector growth in June expanded at the fastest pace since February, supported by growing order flows, especially from overseas, an HSBC survey said. (BS)

Domestic News

- ❖ Ashok Leyland has reported a 7% jump in total sales during the month of June 2014 at 7,452 units as compared to 6,970 units during the same month last year. (BS)
- ❖ The ministry of civil aviation has identified areas including the provision of automated buggies to senior citizens and disabled persons at airports, setting up of security help desks at all operational airports, simplifying procedures at Air India for quicker disposal of refunds and lost baggage claims to make services more friendly for passengers. (BS)
- ❖ Mumbai-based mid-cap technology product and solutions firm Geometric may well be on the road to recovery, as senior management of the company said that for FY15 the company is confident to meeting Nasscom's industry growth target of 13-15 per cent. (BS)
- ❖ Companies planning to raise funds by way of non-convertible debentures should get the proposal approved by shareholders through a special resolution within six months, according to the government. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3678	(0.0001)	(0.01)
GBP-USD	1.7150	0.0000	0.00
USD-JPY	101.63	0.10	0.10

Bond Markets	Closing	Chg
10-yr bond	8.76	-0.5 bps
Interbank call	8.12	-63.0 bps



❖ TAL Manufacturing Solutions, a wholly-owned subsidiary of Tata Motors, delivered its first advanced composite floor beam for the Boeing 787-9 Dreamliner to Boeing. (BS)

❖ Punj Lloyd has bagged the order for expansion and revamping of Ahmadi Depot from Kuwait National Petroleum Company (KNPC). This project, valued at Rs 1,418 crore (\$236.09 million), is scheduled for completion in 35 months. Kuwait is the latest addition to Punj Lloyd's geographical presence, bringing its global operations to 24 countries. (BS)

❖ Oil regulator PNGRB has once again extended the bid deadline for licences to retail CNG and piped cooking gas in 14 cities, including Bengaluru and Pune, by one month to August 11. (BS)

❖ ITI Limited has bagged two advance purchase orders from BSNL amounting to Rs 2,984 Crore, the company said. (BS)

❖ Automaker major Mahindra & Mahindra reported a marginal increase in total sales at 38,471 units in June. (BS)

❖ British Safety Council (BSC) has awarded a five star grading to DLF's 17 office buildings in Gurgaon. (BS)

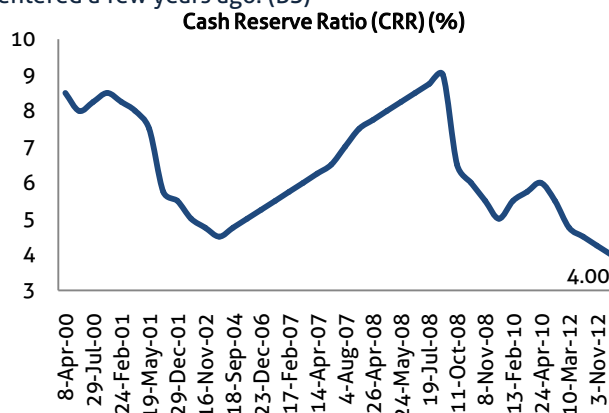
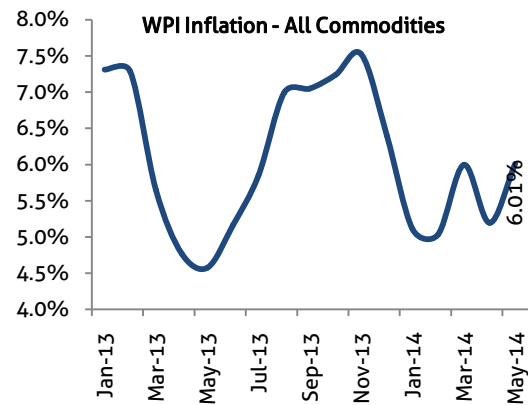
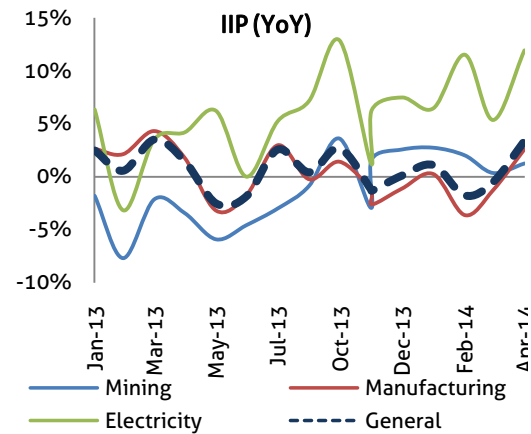
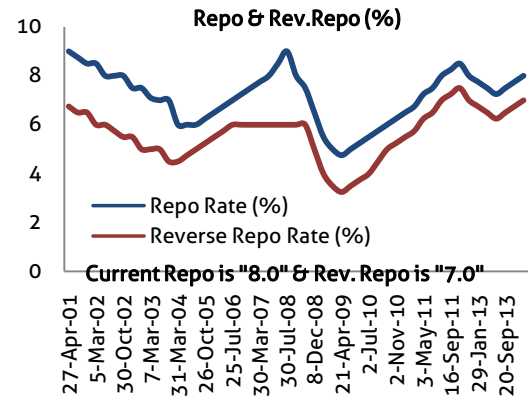
❖ State-run power equipment maker BHEL has successfully commissioned another 250 MW thermal unit, valued at Rs 990 crore, at Chhabra plant in Rajasthan. (BS)

❖ Most sugar mills in India's northern states especially in UP owe to banks substantially higher than the value of inventories they possess. This indicates that even after selling all their sugar stocks, mills would not be able to clear their dues which pose a threat for their potential to raise working capital for the next season. (BS)

❖ Hindustan Construction Company said its realty arm Lavasa Corporation will float a Rs 750 crore initial public issue. It said Lavasa has filed its draft red herring prospectus (DRHP) with Sebi. (BS)

❖ At a time when food inflation is stretching household budgets, the common man may have some reason to cheer as milk prices are unlikely to go up further for the coming couple of quarters. (BS)

❖ As the textile industry is reviving on the back of stable raw material prices and fast growing exports a move to get out of debt trap has begun. Companies like Indo Count are proposing to come out of Corporate Debt Restructuring (CDR) mechanism they had entered a few years ago. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Jul-14	Allcargo Logistics Ltd	SHASHIKIRAN SHETTY	SELL	3000000	245.0
1-Jul-14	Texmaco Infra & Holdg Ltd	ARTISTIC FINANCE PRIVATE LIMITED	BUY	1033897	42.0
1-Jul-14	Diamond Power Infra Ltd	ARKAYA INVESTMENTS	SELL	287962	124.0
1-Jul-14	Autoline Industries Limit	ARKAYA INVESTMENTS	BUY	277588	103.1
1-Jul-14	MT Educare Ltd	M/S GRANDEUR PEAK INTERNATIONAL OPPORTUNITIES FUND	BUY	205543	123.1

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Jul-14	Aagam Cap	IVORY CONSULTANTS PVT LTD	B	71,150	177.5
1-Jul-14	Hester Bio	SHIRIN DHUNJISHAW GHANDHI	S	60,000	171.8
1-Jul-14	Cubical Fin	MRIDUL SECURITIES PVT LTD	B	497,800	20.1
1-Jul-14	Control Print-\$	DINERO WEALTH ADVISORS PRIVATE LIMITED	B	50,189	129.1
1-Jul-14	Nikki Global	SIDDHARTH GUPTA	S	40,219	150.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
524348	Aarti Drugs	02-Jul-14	Final Dividend - Rs.5.50	-
532927	Eclerx Serv	02-Jul-14	Dividend - Rs.35.00	-
500314	Oriental Hotels	02-Jul-14	Dividend - Rs.0.55	-
505807	Rolcon Engr	02-Jul-14	Dividend - Rs.1.50	-
506863	Swadeshi Inds	02-Jul-14	Stock Split from Rs.10/- to Re.1/-	03-Jul-14
532977	Bajaj Auto	03-Jul-14	Dividend - Rs.50.00	-
532978	Bajaj Finserv	03-Jul-14	Dividend - Rs.1.75	-
500490	Bajaj Holdings	03-Jul-14	Dividend - Rs.30.00	-
500034	BAJFINANCE	03-Jul-14	Dividend - Rs.16.00	-
532483	Canara Bank	03-Jul-14	Final Dividend - Rs.4.50	-
500182	Hero MotoCorp	03-Jul-14	Dividend - Rs.65.00	-
500234	Kakatiya Cem	03-Jul-14	Dividend - Rs.2.70	-
590003	Karur Vysya Bank	03-Jul-14	Dividend - Rs.13.00	-
500266	Maharashtra Scoot	03-Jul-14	Dividend - Rs.25.00	-
532720	Mahindra & Mah Fin	03-Jul-14	Dividend - Rs.3.80	-
532784	Sobha Dev	03-Jul-14	Dividend - Rs.7.00	-
532301	Tata Coffee	03-Jul-14	Dividend - Rs.13.00	-
506690	Unichem Lab	03-Jul-14	Final Dividend - Rs.4.00	-
531335	Zydus Wellness-\$	03-Jul-14	Dividend - Rs.6.00	-
500469	Federal Bank	04-Jul-14	Dividend - Rs.2.00	-
500010	HDFC	04-Jul-14	Dividend - Rs.14.00	-
505750	Josts Engr	04-Jul-14	Dividend - Rs.12.50	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Jun-14	JPY	Industrial Production (MoM)		0.90%	-2.80%
30-Jun-14	JPY	Construction Orders (YoY)			104.90%
30-Jun-14	EUR	Private Loans (YoY)		-1.60%	-1.80%
30-Jun-14	GBP	BoE Consumer Credit		0.70B	0.67B
30-Jun-14	GBP	Mortgage Lending		1.60B	1.72B
30-Jun-14	USD	Chicago PMI		63	65.5
30-Jun-14	USD	Pending Home Sales (MoM)		1.50%	0.40%
30-Jun-14	USD	Dallas Fed Mfg Business Index			8
01-Jul-14	JPY	Tankan Large Manufacturers Index		15	17
01-Jul-14	CNY	Chinese Manufacturing PMI		51	50.8
01-Jul-14	USD	Total Vehicle Sales		16.40M	16.77M
01-Jul-14	EUR	Manufacturing PMI		51.9	51.9
01-Jul-14	GBP	Manufacturing PMI		56.8	57
01-Jul-14	EUR	Unemployment Rate		11.70%	11.70%
01-Jul-14	USD	Construction Spending (MoM)		0.50%	0.20%
01-Jul-14	USD	ISM Manufacturing Employment		53.4	52.8
01-Jul-14	USD	ISM Manufacturing PMI		55.9	55.4
02-Jul-14	GBP	Nationwide HPI (MoM)		0.60%	0.70%
02-Jul-14	EUR	PPI (MoM)		-0.10%	-0.10%
02-Jul-14	USD	MBA 30-Year Mortgage Rate			4.33%
02-Jul-14	USD	Challenger Job Cuts			53.0K
02-Jul-14	USD	ADP Nonfarm Employment Change		203K	179K
02-Jul-14	USD	Factory Orders (MoM)		-0.20%	0.70%
03-Jul-14	EUR	Retail Sales (MoM)		0.20%	0.40%
03-Jul-14	EUR	Interest Rate Decision			0.15%
03-Jul-14	USD	Initial Jobless Claims		314K	312K
03-Jul-14	USD	Nonfarm Payrolls		210K	217K
03-Jul-14	USD	Trade Balance		-45.00B	-47.20B
03-Jul-14	USD	Unemployment Rate		6.30%	6.30%
03-Jul-14	USD	ISM Non-Manufacturing PMI		56.3	56.3

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Jul-14	INR	HSBC Markit Manufacturing PMI			51.4
03-Jul-14	INR	Indian HSBC Services PMI			50.2

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