

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6736	(0.24)	CNX IT	9472	(0.08)
Sensex	22509	(0.19)	BANK NIFTY	12564	(1.19)
DowJones	16573	0.00	S&P CNX 500	5254	(0.34)
Nasdaq	4238	(0.91)	CNX FMCG	17890	0.38
Hangseng	22561	(0.02)	CNX REALTY	191	(0.26)
Shanghai	2045	0.08	CNX AUTO	5869	(0.17)
Nikkei	15072	0.00	CNX ENERGY	8475	(0.73)
Strait Times	3219	(0.04)	CNX PHARMA	7841	1.02
Kospi	1992	(0.10)	Advances / Declines	BSE	NSE
Taiwan	8889	(0.19)	Advances	1277	643
FTSE	6649	(0.15)	Declines	1511	826
CAC	4449	0.42	Unchanged	131	91
DAX	9629	0.06	Total	2919	1560

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ASIANPAINT	541.30	3.54
JINDALSTEL	298.50	2.86
HINDUNILVR	610.00	2.59
LUPIN	980.20	2.23
AMBUJACEM	205.00	2.17

Nifty Losers		
Company	Price(Rs)	Chg(%)
BANKBARODA	751.30	(3.07)
BHEL	187.55	(3.00)
DLF	171.50	(2.89)
PNB	738.50	(2.48)
IDFC	124.70	(2.43)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
RAMCOCEM	16.95	0.13	127
Page Inds	0.22	0.00	66
APL Apollo Tubes	2.65	0.07	39
Gujarat Gas	6.64	0.17	38
Shriram City Uni	5.03	0.17	29

Indian Forex	Closing	Chg	% Chg
USD/INR	60.125	0.478	0.80
GBP/INR	100.071	0.862	0.87
EUR/INR	82.741	0.349	0.42
JPY/INR	57.870	0.390	0.68

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28515	290
Silver (Rs/1kg)	42935	310

Commodities	Price	% Chg.
Crude (US\$/BBL)	100.4	1.17
Brent (US\$/BBL)	106.2	1.48
Gold (US/oz)	1284.9	(0.59)
Silver (US\$/oz)	19.8	(0.75)
Copper (US\$/MT)	6606.0	(1.59)
Alum (US\$/MT)	1782.5	0.34
Zinc(US\$/MT)	1965.0	(0.96)

ADR	Cl. Values	% Chg.
ICICI Bank	42.72	(1.60)
HDFC Bank	40.52	(0.85)
Infosys	55.17	(0.50)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	44.06	(1.09)
Wipro	13.47	(0.31)
Tata Motors	36.34	(0.46)

Market Sensor

US market failed to end higher in volatile trading Thursday, snapping a four-day win streak, ahead of the widely-watched government jobs report. The Dow and S&P 500 hit record intraday highs earlier in the session. Dow Jones Industrial Average was flat at 16572.55. Nasdaq Composite was down 0.91% or 38.72 points at 4237.74. Standard & Poor's 500 was down 0.11% or 2.13 points at 1888.77.

Indian equity market saw its record high in intraday trade but lost ground on profit booking amid volatility. The HSBC-Markit survey contracted in Mar with service activities contracting for the ninth straight month affected the market sentiment adversely. Nifty ended the previous trading session with a decline of 0.24% or 16.45 points at 6736.10. On Thursday's trading session, FII's bought net Rs.717.39 Cr in cash market and sold net Rs.124.61 in derivative segment. Whereas, DII sold net Rs.716.57 Cr in cash segment.

Coming to today's trade day Nifty to remain volatile with crucial intraday support exists at 6680 followed by 6610 while resistance is seen at 6800 followed by 6870.

Global News

❖ European Central Bank President Mario Draghi mused that the International Monetary Fund offers public opinions on how he should conduct monetary policy in a way that it doesn't with the Federal Reserve. (Bloomberg)

❖ Emerging markets, increasingly dependent on China for their own growth, may suffer as the world's second-largest economy decelerates, the International Monetary Fund said. (Bloomberg)

❖ Russia's economy is on the brink of a technical recession this quarter after gauges of manufacturing and services showed that seasonally adjusted output probably shrank between January and March for the first time since 2010. (Bloomberg)

❖ The trade deficit in the U.S. unexpectedly widened in February to the highest level in five months as exports of fuels and capital equipment dropped. (Bloomberg)

❖ The number of Americans filing applications for unemployment benefits rose more than forecast last week after reaching a six-month low, a sign that progress in the labor market remains fitful. (Bloomberg)

Economic News

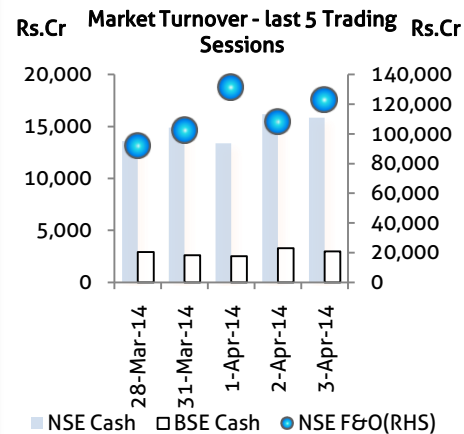
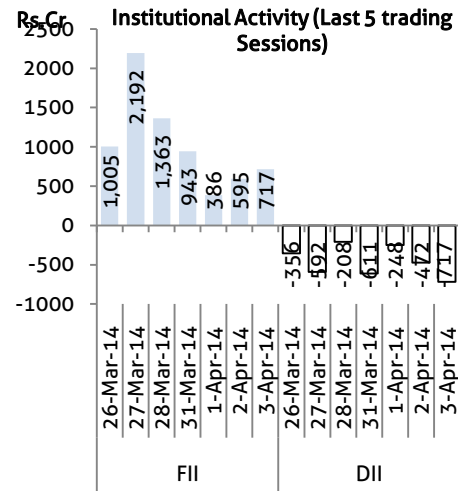
- ❖ With award of new port projects gaining pace, consultancy firm Deloitte called for an urgent need on a holistic approach while developing such terminals, saying support infrastructure like road and rail connectivity also needs to be focused. (BS)
- ❖ The Associated Chamber of Commerce and Industries urged the Tamil Nadu Government to expedite the adoption of solar power tariff by the State Electricity board along with the approval of power purchase agreements, saying the delay has affected investment proposals. (BS)
- ❖ Maharashtra has emerged as the number one investment destination in the country replacing Gujarat, according to an Assocham report. (BS)
- ❖ In a significant ruling, Orissa High Court has upheld the state government's circular of December 2012 in which it had asked mine owners in the state to supply half of their mine lumps to local standalone units. (BS)
- ❖ Activity in the largest segment of the Indian economy -- services -- failed to pickup in March as contraction continued for the ninth straight month, HSBC Purchasing Managers' Index data showed. The PMI services stood at a three-month low of 47.5 points in March compared to 48.8 points in February. The composite index, including both manufacturing and sectors, fell and stood at 48.9 points in March against 50.3 points in the previous month. (BS)
- ❖ Indian Oil Corporation has begun sale of market-priced 5-kg Free Trade LPG (FTL) cylinders through kirana stores and supermarkets. (BS)
- ❖ With award of new port projects gaining pace, consultancy firm Deloitte called for an urgent need on a holistic approach while developing such terminals, saying support infrastructure like road and rail connectivity also needs to be focused. (BS)

Domestic News

- ❖ In what will be Warren Buffett's first investment in Gujarat, the Lubrizol Corporation, a wholly owned subsidiary of Buffett's Berkshire Hathaway Inc. on Thursday announced setting up of a chlorinated polyvinyl chloride (CPVC) compounding plant in Dahej. (BS)
- ❖ State-owned Coal India (CIL) has increased the price of a certain grade of coal from one of its mines in Godda district of Jharkhand. (BS)
- ❖ Glenmark Pharmaceuticals said its novel chemical entity for potential treatment of chronic inflammatory disorders is entering human trials. (BS)
- ❖ India's largest steel maker SAIL has kept its prices for the current month unchanged amid weak demand and appreciation in the value of the rupee. (BS)
- ❖ India Realty Excellence Fund II LLP (IREF II), managed by Motilal Oswal Real Estate Investment Advisors, said it has made two investments worth Rs 100 crore in the country. (BS)
- ❖ ABG Cement will be utilising the proceeds from sale of its 51% stake in the Gujarat unit mainly for debt reduction of the company, Dhananjay Datar, chief financial officer of the company told Business Standard. (BS)
- ❖ Tata Power is in the process of completing projects having a total generation capacity of nearly 850 MW, which would take its overall capacity to more than 9,000 MW. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3713	(0.0007)	(0.05)
GBP-USD	1.6587	(0.0011)	(0.07)
USD-JPY	103.95	0.02	0.02

Bond Markets	Closing	Chg
10-yr bond	9.19	4.5 bps
Interbank call	8.35	-45.0 bps



Domestic News (Cont...)

❖ The IT and ITeS Industry Association of Andhra Pradesh (ITsAP), a registered apex body with more than 300 members representing the software industry, on Thursday submitted its recommendations for accelerated growth of the IT and ITeS sector in Andhra Pradesh and Telangana to all the political parties for inclusion of the same in their manifestos. (BS)

❖ Novartis has taken Biocon to court for infringing the patent on its diabetes drug Galvus, the Swiss drugmaker said in a statement on Thursday. (BS)

❖ Videocon Telecom has achieved revenues of Rs 1,049 crore in the 2013-14 financial year on the back of strong growth in its operational four circles. (BS)

❖ India has a critical mass of software product companies (over 3,500), which has entered the maturity stage of the industry. Currently, they are going through a period of combinatorial innovation, said BVR Mohan Reddy, chairman of Infotech Enterprises Limited (to be rechristened as Cyient Limited shortly). (BS)

❖ IL&FS Engineering and Construction Company has filed initial papers with market regulator Sebi to raise Rs 300 crore through rights issue. (BS)

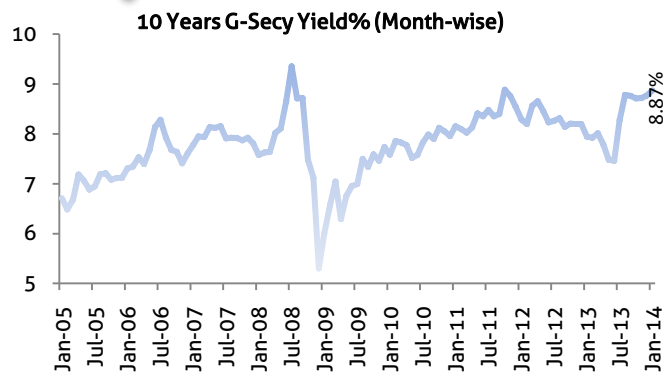
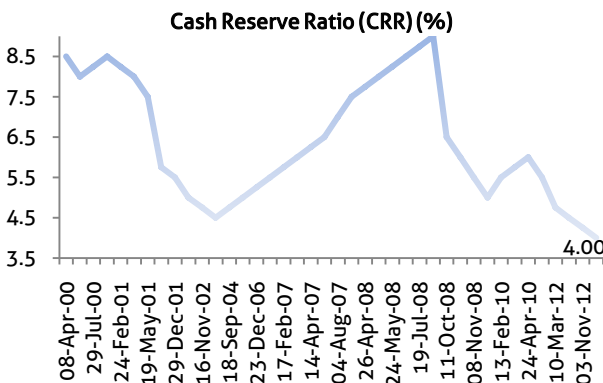
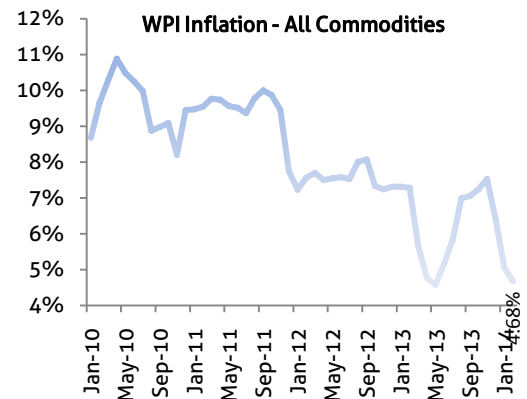
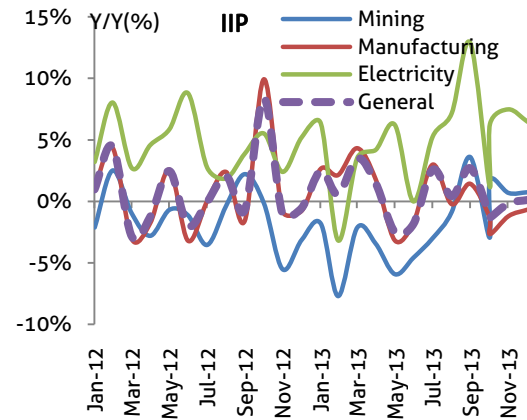
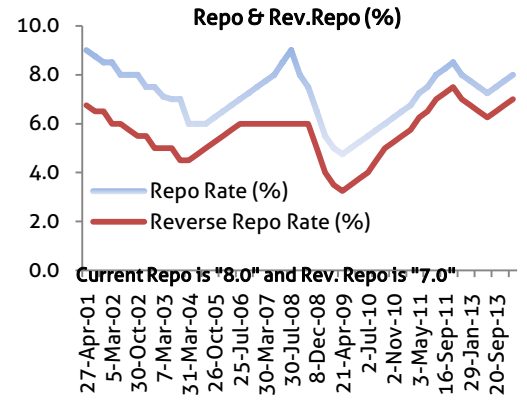
❖ Sahara Group expressed its inability before the Supreme Court to immediately pay Rs 10,000 crore for securing bail of its chief Subrata Roy and its two directors, who have been in jail since March 4. (BS)

❖ Unitech Corporate Parks plc which is listed in the London Stock Exchange, Alternative Investment Market has received an offer from a global real estate major to sell off its entire stake in its 100% subsidiary Candor Investments Ltd. (BS)

❖ Hindustan Aeronautics Limited (HAL), the Bangalore-based public sector defence company, has notched-up the highest ever turnover of Rs 15,180 crore for 2013-14, a growth of 6 per cent over the previous year. In 2012-13, the company had reported a turnover of Rs 14,324 crore. (BS)

❖ Mangalore Refinery and Petrochemicals Ltd <mrpl.ns> will change its crude mix and production pattern in the year to March after commissioning of a coker unit to boost its profitability, a top company executive said on Thursday. (BS)

❖ India's iron ore production is likely to grow 14% to touch 155 million tonne in fiscal 2014-15. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Apr-14	Jaiprakash Power Ven. Lt	JAYPEE DEVELOPMENT CORPORATION LIMITED	BUY	40000000	14.7
3-Apr-14	Shriram City Union Financ	IDBI TRUSTEESHIP SERVICES LIMITED (INDIA ADVANTAGE FUND-VI	SELL	468120	1200.0
3-Apr-14	Aban Offshore Ltd.	GAJANAN ENTERPRISES	BUY	483879	563.1
3-Apr-14	Unitech Ltd	ADROIT SHARE & STOCK BROKER PVT. LTD.	SELL	15318002	14.7
3-Apr-14	Maha Seamless Ltd	MAHARASHTRA SEAMLESS LIMITED	BUY	400000	218.8

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Apr-14	Repco Home Fin	WCP HOLDING III	S	2,728,100	325.0
3-Apr-14	Shriram City Uni	INDIA ADVANTAGE FUND VI	S	500,000	1200.0
3-Apr-14	Amulya Leas	SAMEER GUPTA	B	221,832	26.0
3-Apr-14	Transpek Inds-\$	HRIDAYNATH CONSULTANCY PRIVATE LIMITED	S	36,137	116.0
3-Apr-14	Suryanagri Fin	TRISHUL VINTRADE PRIVATE LIMITED	S	50,000	41.3

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
531909	Swagruha Infra	04-Apr-14	Stock Split from Rs.10/- to Re.1/-	07-Apr-14
532191	State Bank Trav	09-Apr-14	Interim Dividend - Rs.2.50	10-Apr-14
500150	Foseco India	10-Apr-14	Special Dividend - Rs.12.50	-
500150	Foseco India	10-Apr-14	Final Dividend - Rs.3.00	-
506480	Gulf Oil Corp-\$	10-Apr-14	Special Dividend with Interim - Rs.0.30	14-Apr-14
506480	Gulf Oil Corp-\$	10-Apr-14	Interim Dividend - Rs.2.20	14-Apr-14
517174	Honeywell Auto	10-Apr-14	Dividend - Rs.10.00	-
532200	State Bank Mysre	10-Apr-14	Interim Dividend - Rs.3.00	12-Apr-14
500472	SKF India	11-Apr-14	Dividend - Rs.7.50	-
500674	SANOFI	16-Apr-14	Final Dividend - Rs.35.00	-
506222	Styrolution ABS	16-Apr-14	Dividend - Rs.4.00	-
506390	Clariant Chem	17-Apr-14	Final Dividend - Rs.20.00	-
500133	Esab India	17-Apr-14	Final Dividend - Rs.1.00	-
520113	Vesuvius India	17-Apr-14	Dividend - Rs.4.75	-
532819	Mindtree	21-Apr-14	3rd Interim Dividend - Rs.-	22-Apr-14
532281	HCL Tech	22-Apr-14	Interim Dividend - Rs.-	23-Apr-14
509820	Paper Products	22-Apr-14	Dividend - Rs.2.80	-
500002	ABB India Ltd.	25-Apr-14	Dividend - Rs.3.00	-
509496	ITD Cem India	28-Apr-14	Dividend - Rs.1.00	-
532735	R Systems	29-Apr-14	Final Dividend - Rs.0.95	-
500168	Goodyear India	30-Apr-14	Dividend - Rs.9.00	-
500870	Castrol India	02-May-14	Final Dividend - Rs.3.50	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
31-Mar-14	JPY	Manufacturing PMI			55.5
31-Mar-14	JPY	Industrial Production (MoM)		0.30%	3.80%
31-Mar-14	GBP	BoE Consumer Credit		0.70B	0.66B
31-Mar-14	GBP	Mortgage Approvals		75K	77K
31-Mar-14	USD	Chicago PMI		59	59.8
31-Mar-14	USD	Dallas Fed Mfg Business Index			0.3
01-Apr-14	JPY	Tankan Large Manufacturers Index		18	16
01-Apr-14	USD	Total Vehicle Sales		15.80M	15.34M
01-Apr-14	EUR	Manufacturing PMI		53	53
01-Apr-14	GBP	Manufacturing PMI		56.7	56.9
01-Apr-14	EUR	Unemployment Rate		12.00%	12.00%
01-Apr-14	USD	Manufacturing PMI			55.5
01-Apr-14	USD	Construction Spending (MoM)		0.10%	0.10%
01-Apr-14	USD	ISM Manufacturing PMI		54	53.2
02-Apr-14	GBP	Nationwide HPI (MoM)		0.80%	0.60%
02-Apr-14	EUR	PPI (MoM)		-0.10%	-0.30%
02-Apr-14	USD	MBA 30-Year Mortgage Rate			4.56%
02-Apr-14	USD	ADP Nonfarm Employment Change		193K	139K
02-Apr-14	USD	ISM - NY Business Conditions			626.1
02-Apr-14	USD	Factory Orders (MoM)		1.20%	-0.70%
03-Apr-14	EUR	Retail Sales (YoY)		0.80%	1.30%
03-Apr-14	EUR	Interest Rate Decision		0.25%	0.25%
03-Apr-14	USD	Initial Jobless Claims		316K	311K
03-Apr-14	USD	Trade Balance		-38.50B	-39.10B
03-Apr-14	USD	ISM Non-Manufacturing PMI		53.5	51.6
04-Apr-14	USD	Nonfarm Payrolls		200K	175K
04-Apr-14	USD	Unemployment Rate		6.60%	6.70%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Apr-14	INR	HSBC Markit Manufacturing PMI			52.5
01-Apr-14	INR	Indian Interest Rate Decision		8.00%	8.00%
02-Apr-14	INR	Indian M3 Money Supply			14.20%
03-Apr-14	INR	Indian HSBC Services PMI			48.8
04-Apr-14	INR	Indian Bank Loan Growth			14.70%

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