

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7715	(0.13)	CNX IT	9831	0.24
Sensex	25824	(0.07)	BANK NIFTY	15452	(0.25)
DowJones	17068	0.54	S&P CNX 500	6267	(0.15)
Nasdaq	4486	0.63	CNX FMCG	17766	0.26
Hangseng	23570	0.16	CNX REALTY	3869	(0.19)
Shanghai	2059	(0.18)	CNX AUTO	7149	0.69
Nikkei	15442	0.61	CNX ENERGY	9899	(1.26)
Strait Times	3284	0.34	CNX PHARMA	8750	1.07
Kospi	2013	0.10	Advances / Declines	BSE	NSE
Taiwan	9507	(0.20)	Advances	1287	471
FTSE	6865	0.72	Declines	1475	717
CAC	4490	1.02	Unchanged	101	24
DAX	10029	1.19	Total	2863	1212

Nifty Gainers		
Company	Price(Rs)	Chg(%)
TATAMOTORS	470.05	3.13
WIPRO	554.40	2.51
SUNPHARMA	704.80	1.64
M&M	1232.00	1.00
CIPLA	447.50	0.72

Nifty Losers		
Company	Price(Rs)	Chg(%)
HEROMOTOCO	2591.00	(3.31)
BAJAJ-AUTO	2293.35	(2.40)
HINDALCO	174.00	(2.38)
TATAPOWER	107.00	(2.15)
ONGC	417.50	(2.13)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Apollo Hosp	2.41	0.1	22
Bajaj Finserv	1.23	0.1	20
Century Ply-\$	29.97	2.1	14
DCMSHRIRAM	5.83	0.6	9
Sterling Hol Res-\$	4.73	0.5	9

Indian Forex	Closing	Chg	% Chg
USD/INR	59.723	(0.252)	(0.42)
GBP/INR	102.454	(0.444)	(0.43)
EUR/INR	81.542	(0.481)	(0.59)
JPY/INR	58.620	(0.430)	(0.73)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28000	(80)
Silver (Rs/1kg)	44430	207

Commodities	Price	% Chg.
Crude (US\$/BBL)	103.9	(0.13)
Brent (US\$/BBL)	111.0	0.10
Gold (US/oz)	1320.4	(0.38)
Silver (US\$/oz)	21.1	(0.05)
Copper (US\$/MT)	7121.0	1.01
Alum (US\$/MT)	1890.0	1.50
Zinc(US\$/MT)	2230.0	1.02

ADR	Cl. Values	% Chg.
ICICI Bank	50.80	0.66
HDFC Bank	49.67	0.24
Infosys	53.73	0.08
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	44.02	0.03
Wipro	12.22	0.08
Tata Motors	42.14	0.99

Market Sensor

US market rose on Thursday, lifting the Dow industrials above 17,000, after the government reported the economy created a better-than-expected 288,000 jobs in June and the unemployment rate fell to 6.1 percent. Dow Jones Industrial Average was up 0.54% or 92.02 points at 17068.26. Nasdaq Composite was up 0.63% or 28.19 points at 4485.93. Standard & Poor's 500 was up 0.55% or 10.82 points at 1985.44.

Indian Equity market ended on a flat note. On the positive development was that the HSBC Services Purchasing Managers Index climbed to a 17-month high to 54.4 in June from 50.2 previous month. Nifty ended the previous trading session with a decline of 0.13% or 10.35 points at 7714.80. On Thursday's trading session, FII's bought net Rs.950.82 Cr in cash market and sold net Rs.1203.95 in derivative segment. Whereas, DII sold net Rs.624.21 Cr in cash segment.

Coming to today's trade Nifty to remain volatile with positive bias, crucial intraday support exists at 7685 followed by 7650 while resistance is seen at 7768 followed by 7805.

Global News

❖ Wall Street economists moved up their estimated dates for the Federal Reserve's first interest-rate increase since 2006 after job growth surged in June beyond forecasts, cutting unemployment to almost a six-year low. (Bloomberg)

❖ France and Germany raised pressure on President Vladimir Putin to push pro-Russian separatists to reach an agreement with Ukraine, as they stepped up diplomacy aimed at reinstating a cease-fire within 48 hours. (Bloomberg)

❖ Sixteen years after the overthrow of the dictator Suharto, Indonesia is turning back toward that regime as his former son-in-law pulls level in the race to run the world's third-largest democracy. (Bloomberg)

❖ Russia, which scrapped a \$7 billion Eurobond sale this year, plans to more than double its annual domestic borrowing program in the next three years from the current level to finance the budget deficit. (Bloomberg)

❖ Service providers from construction firms to retailers expanded in June at the second-fastest pace in almost a year, showing more momentum in the U.S. economy. The Institute for Supply Management's non-manufacturing index was 56 last month after May's 56.3, which was the highest since August, the Tempe, Arizona-based group said. (Bloomberg)

Economic News

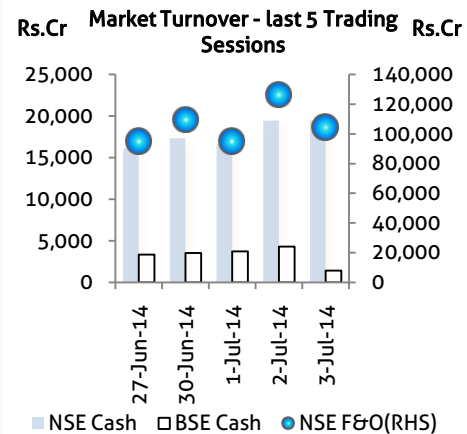
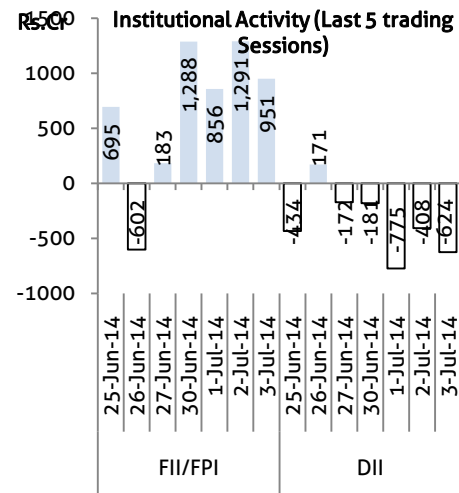
- ❖ The Karnataka government while expressing support for the implementation of Goods and Services Tax (GST), urged the Union Finance Minister Arun Jaitley to immediately release CST revenue loss compensation amounting to Rs 3,889 crore to the state. (BS)
- ❖ The Ministry of Civil Aviation (MoCA) is likely to modify and add to the list of 50 locations identified for development of low cost airports in consultation with the Ministry of Tourism to improve connectivity to regional and remote areas. (BS)
- ❖ Monsoon rains revived in the key planting month after recording the weakest first month of the June-September monsoon season in five years, weather officials said on Thursday. (BS)
- ❖ An upbeat mood unleashed by the Narendra Modi government lifted the services activities to a 17-month high in June, shows the widely-tracked HSBC purchasing managers' index (PMI). (BS)
- ❖ Days after the price of non-subsidized cooking gas (LPG) was hiked by Rs 16.50 per cylinder, the government said the increase will impact less than 1% of the consumers. (BS)
- ❖ Needled over persistent power crisis in Uttar Pradesh, chief minister Akhilesh Yadav has now written to Prime Minister Narendra Modi seeking more electricity from the central pool. (BS)
- ❖ The Narendra Modi-led government will initiate measures to turn-around the Highways sector in 2 years time by garnering funds to the tune of Rs one lakh crore in a year, Road Transport and Highways Minister Nitin Gadkari said here. (BS)
- ❖ The policy makers of the country may be worried over the distribution of monsoon and its impact on kharif crops this year, the farmers sowing paddy especially basmati variety are firm to continue with their plans. (BS)
- ❖ Inflation is still uncomfortably high in India and the new government should avoid fiscal slippage as it seeks to revive the economy, the World Bank's India director told Reuters. (BS)
- ❖ India's private sector output witnessed significant uptrend in June as both manufacturing and services sector registered solid rate of expansion, driven by robust order flows and stronger business sentiment, an HSBC survey said. (BS)

Domestic News

- ❖ Five and half years after putting the 8.5 acre plot on the block, the Indian arm of German multi-national Siemens has sold a 8.5 acre land parcel in Bangalore to city based developer Prestige group for Rs 345 crore. (BS)
- ❖ FIPB has cleared six FDI proposals with estimated investments of Rs 551 crore, including Mauritius-based Destimoney Enterprises' Rs 489.99 crore proposal for subscribing to partly paid equity shares of PNB Housing Finance Ltd. (BS)
- ❖ Leading edible oil manufacturer Adani Wilmar will invest Rs 600 crore this fiscal to expand capacity in its refineries across the country, the company said. (BS)
- ❖ Capital market regulator Securities and Exchange Board of India (Sebi) has sought a reply from the Bombay Stock Exchange (BSE), which had shutdown all markets due to a network outage. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3608	(0.0002)	(0.01)
GBP-USD	1.7163	0.0008	0.05
USD-JPY	102.13	(0.06)	(0.06)

Bond Markets	Closing	Chg
10-yr bond	8.69	-3.0 bps
Interbank call	7.66	-37.0 bps



Domestic News (Cont...)

❖ Indian companies mopped up over Rs 1,400 crore via retail issuance of non-convertible debentures in the first quarter the current fiscal, primarily to meet the working capital requirements. (BS)

❖ Asian Development Bank has made financial commitment of \$350 million in loan and equity investment for two energy projects in India. (BS)

❖ Reliance Communications (RCom) has initiated the process to monetise its real estate assets across the country, aiming to raise Rs 5,000 crore through this. The company will use the proceeds to part-repay its debt, which stands at Rs 34,000 crore even after the recent qualified institutional placement (QIP) of its shares. An RCom board committee recently approved the sale of these assets. (BS)

❖ Alstom T&D India said it has bagged a contract worth Rs 27.7 crore from Himachal Pradesh Power Transmission Company to supply a 66 kV gas-insulated substation (GIS) for evacuating power from new generation sources to Kinnar district in the state. (BS)

❖ The new government could sell a 5% stake in the state-run Steel Authority of India Ltd (SAIL) in the last week of this month, three people directly involved in the process said on Thursday. (BS)

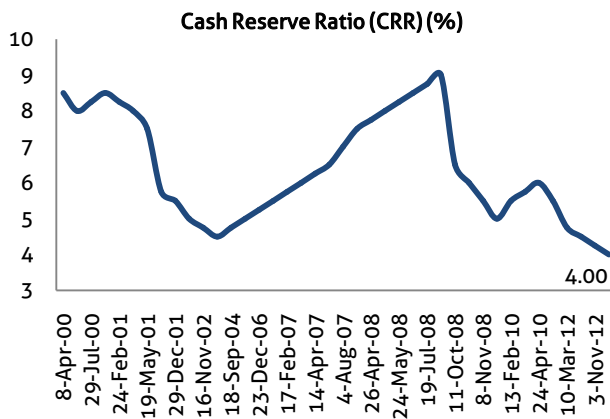
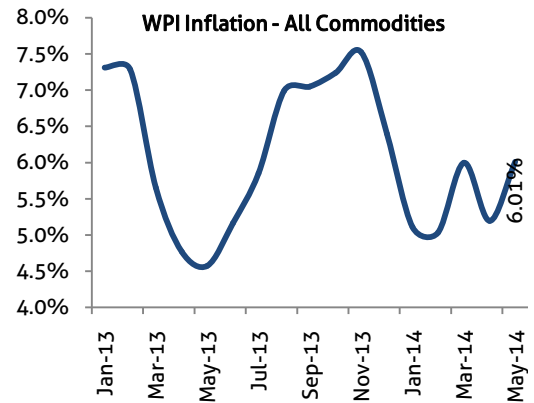
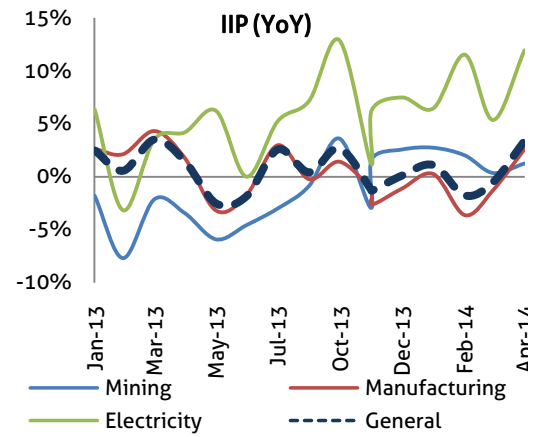
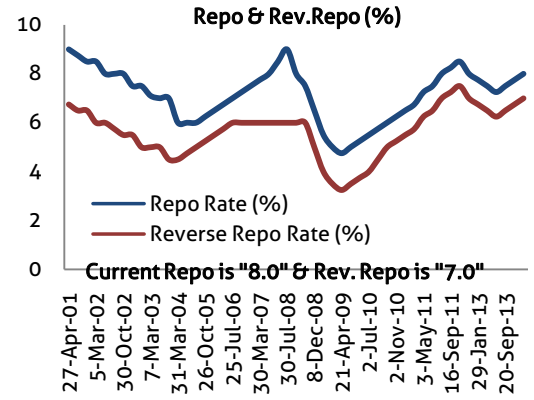
❖ Coal India (CIL) seems to be in a dilemma over its proposal to enter the fertilizer sector. The company had earlier sought shareholder approval through postal ballot to amend its Memorandum of Association to enable entry into the sector. (BS)

❖ Sun Pharmaceutical Industries Ltd is recalling 200 vials of the chemotherapy drug gemcitabine in the United States due to a lack of assurance of sterility, the US Food and Drug Administration said on Thursday. (BS)

❖ Sesa Sterlite Ltd, India's largest private iron ore miner, expects to resume production in the country's Goa state in September, a senior official of the company said on Thursday. (BS)

❖ Rashtriya Ispat Nigam Limited, the corporate entity of VizagSteel, plans to expand capacity to 12 million tonnes per annum by 2020-end with an investment outlay of Rs 22,000 crore, a senior company official has said. (BS)

❖ State-run Indian Bank has revised the interest rates on foreign currency non-resident (banking) deposits with immediate effect. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Jul-14	AmtekAuto-Roll Sett	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LTD	SELL	2070947	255.9
3-Jul-14	Jagran Prakashan Limited	JAGRAN PRAKASHAN EMPLOYEE WELFARE TRUST	SELL	2500000	129.0
3-Jul-14	Housing Development and I	STANDARD CHARTERED BANK (MAURITIUS) LIMITED	BUY	2950000	102.3
3-Jul-14	Amtek India Limited	ASIA INVESTMENT CORPORATION LIMITED	SELL	2000000	101.0
3-Jul-14	Marico Kaya Entrprses Ltd	INDIVEST PTE LIMITED	SELL	403310	224.3

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Jul-14	Century Ply-\$	SUBHAM AGARWAL	S	1,300,000	81.0
3-Jul-14	Aagam Cap	IVORY CONSULTANTS PVT LTD	B	146,605	174.9
3-Jul-14	Pokarna	PREMIER INVESTMENT FUND LIMITED	B	96,000	241.0
3-Jul-14	Cubical Fin	SHREE AERAN MARKETING PRIVATE LIMITED	B	497,000	20.1
3-Jul-14	Intellvisions-\$	FLABBY TRADERS PRIVATE LIMITED	B	250,375	22.1

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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	-
500247	Kotak Mah Bank	04-Jul-14	Dividend - Rs.0.80	-
500250	LG Balakrishnan	04-Jul-14	BONUS 1:1	-
500250	LG Balakrishnan	04-Jul-14	Final Dividend - Rs.7.00	-
533169	Man Infra	04-Jul-14	Interim Dividend - Rs.1.35	07-Jul-14
523704	Mastek	04-Jul-14	Final Dividend - Rs.2.75	-
500295	SSLT	04-Jul-14	Final Dividend - Rs.1.75	-
523019	BN Rathi	07-Jul-14	Dividend - Rs.1.20	-
500228	JSW Steel	07-Jul-14	Dividend - Rs.11.00	-
517447	RS Software	07-Jul-14	Final Dividend - Rs.2.50	-
590071	Sundaram Fin	07-Jul-14	Dividend - Rs.10.00	-
500215	Agro Tech Foods	08-Jul-14	Dividend - Rs.2.00	-
517477	Elnet Tech-\$	08-Jul-14	Dividend - Rs.1.40	-
500294	NCC	08-Jul-14	Dividend - Rs.0.20	-
532218	South Indian Bank	08-Jul-14	Dividend - Rs.0.80	-
530117	Adi Finechem	09-Jul-14	BONUS 1:10	10-Jul-14
532792	Cairn India	09-Jul-14	Final Dividend - Rs.6.50	-
532285	Geojit Bnp	09-Jul-14	Final Dividend - Rs.0.10	-
517063	Jetking Info	09-Jul-14	Final Dividend - Rs.1.00	-
532819	Mindtree	09-Jul-14	Special Dividend - Rs.2.50	-

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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