

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8115	0.39	CNX IT	11005	2.41
Sensex	27140	0.45	BANK NIFTY	16110	(0.13)
DowJones	17078	0.06	S&P CNX 500	6518	0.51
Nasdaq	4573	(0.56)	CNX FMCG	19171	(0.67)
Hangseng	25251	(0.27)	CNX REALTY	3564	(0.43)
Shanghai	2291	0.10	CNX AUTO	7851	0.68
Nikkei	15698	(0.19)	CNX ENERGY	9874	(0.06)
Strait Times	3337	(0.34)	CNX PHARMA	10333	0.26
Kospi	2058	0.32	Advances / Declines	BSE	NSE
Taiwan	9430	(0.21)	Advances	1494	760
FTSE	6874	0.65	Declines	1529	792
CAC	4422	0.99	Unchanged	112	66
DAX	9626	1.26	Total	3135	1618

Nifty Gainers		
Company	Price(Rs)	Chg(%)
COALINDIA	377.80	3.96
INFY	3730.00	3.22
BHARTIARTL	404.00	3.17
WIPRO	576.45	2.75
TCS	2602.90	2.56

Nifty Losers		
Company	Price(Rs)	Chg(%)
GAIL	454.50	(2.25)
ONGC	436.90	(1.72)
IDFC	144.60	(1.57)
BHEL	236.70	(1.50)
BAJAJ-AUTO	2225.30	(1.47)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
BHUSANSTL	23.97	0.2	152
SRTRANSFIN	7.68	0.2	49
KOHINOOR	9.27	0.2	45
REDINGTON	10.79	0.4	31
GULFOILCOR-\$	3.44	0.1	28

Indian Forex	Closing	Chg	% Chg
USD/INR	60.545	(0.066)	(0.11)
GBP/INR	99.729	(0.756)	(0.75)
EUR/INR	79.543	(0.019)	(0.02)
JPY/INR	57.710	(0.100)	(0.17)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27512	(192)
Silver (Rs/1kg)	41722	(238)

Commodities	Price	% Chg.
Crude (US\$/BBL)	95.3	2.12
Brent (US\$/BBL)	102.4	1.70
Gold (US/oz)	1270.2	0.16
Silver (US\$/oz)	19.2	(0.10)
Copper (US\$/MT)	6927.0	(0.55)
Alum (US\$/MT)	2078.0	(0.24)
Zinc(US\$/MT)	2372.0	(0.13)

ADR	Cl. Values	% Chg.
ICICI Bank	54.96	0.44
HDFC Bank	51.26	0.65
Infosys	61.22	1.77
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	49.28	0.35
Wipro	12.37	0.17
Tata Motors	48.16	(0.16)

Market Sensor

US market closed mixed on Wednesday, coming off from earlier highs amid economic reports and central bank news. Dow Jones Industrial Average was up 0.06% or 10.72 points at 17078.28. Nasdaq Composite was down 0.56% or 25.62 points at 4572.57. Standard & Poor's 500 was down 0.08% or 1.56 points at 2000.72.

Indian equity market edged higher amid intraday volatility witnessed during the day due to Russia and Ukraine verdict on crude prices. Positive FII investments continue to boost market sentiments. Nifty ended the previous trading session with a gain of 0.39% or 31.55 points at 8114.60. On Wednesday's trading session, FIIs bought net Rs.1288.57 Cr in cash market and bought net Rs.478.20 in derivative segment. Whereas, DII sold net Rs.469.69 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8070 followed by 8040 while resistance exist at 8150 and then at 8220.

Global News

❖ Brazil kept borrowing costs unchanged for the third straight meeting as inflation persists above target and the economy struggles to emerge from recession one month before presidential elections. (Bloomberg)

❖ Bank of Canada Governor Stephen Poloz extended the country's interest-rate pause to four years and remained neutral on his next move, citing slack in the economy that will keep inflation in check. (Bloomberg)

❖ The collapse in U.S. home prices that stoked the worst recession since the Great Depression wasn't quite as severe as initially estimated, according to data from S&P/Case-Shiller. (Bloomberg)

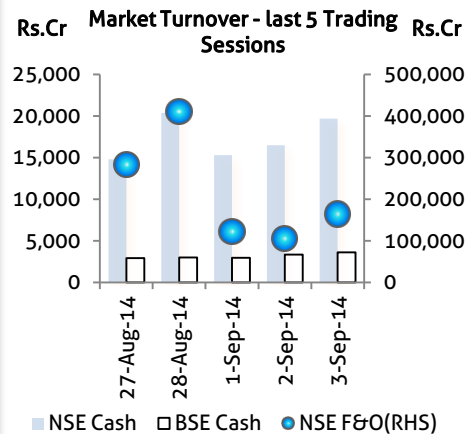
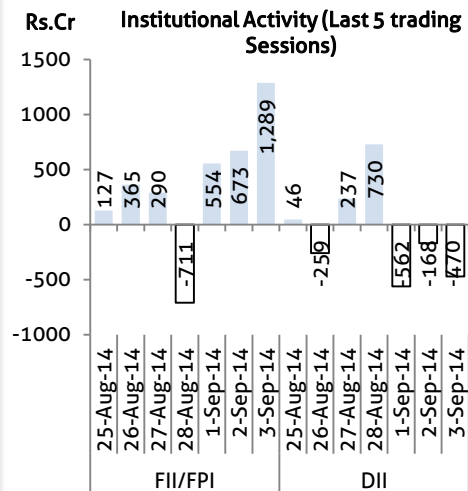
❖ Yu Guoying is struggling to halt a plunge in developing-market sales of her grinning garden gnomes. (Bloomberg)

❖ Mario Draghi has once again primed investors for action. Three months after announcing historic stimulus for the euro area, the European Central Bank president signaled more is needed amid mounting deflation risks and tensions with Russia. (Bloomberg)

Economic News

- ❖The ministry of textiles under the newly formed BJP government has a contrarian view on the allowing foreign direct investment (FDI) in multi brand retail. (BS)
- ❖Uttar Pradesh private sugar mills have deposited nearly Rs 700 crore with the respective district magistrates (DM) after selling their sugar stock as per the Allahabad High Court order. (BS)
- ❖The ministry of textiles has recommended setting up of a privately managed government seeded equity fund for providing equity for start ups and expansion in the entire textile and apparel manufacturing sector. (BS)
- ❖The framework for NDA government's stated goal of developing 100 smart cities will soon be finalised and the plan would allow plenty of opportunity for participation to the private sector, a senior government official said on Tuesday. (BS)
- ❖Australia Prime Minister Tony Abbott said on Wednesday he hoped to sign a deal this week to sell uranium to India for peaceful power generation, but halted uranium exports to Russia over Moscow's role in Ukraine. (BS)
- ❖The first meeting of a high level committee, set up to recommend ways to restructure state-run Food Corporation of India (FCI), will be held next week. (BS)
- ❖Despite positive growth figures achieved by the economy in the first quarter, rating agency Moody's said high fiscal deficit and sticky inflation limit chances of an upward revision in the country's sovereign ratings. (BS)
- ❖Prime Minister Narendra Modi's third official overseas trip has been, in his own words, "very successful". In the course of his 5-day visit to Japan, the PM signed a number of bilateral agreements, key among them a doubling of Japanese investments into India. (BS)
- ❖The number of thermal power plants with less than seven days of coal stocks has risen to 56 this week from 52 last week, government data showed on Wednesday. (BS)
- ❖Growth in services, which dominates India's economy, expanded at its weakest rate in three months in August, as orders inflow moderated after uptick in the immediate post-election period, showed a widely-tracked HSBC purchasing managers' index (PMI). (BS)
- ❖India's ranking on a global competitiveness index fell 11 notches to 71 in 2014-15 against 60 a year earlier, posing yet another problem for the Narendra Modi government, which is striving to revive the investment cycle. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3145	(0.0005)	(0.04)
GBP-USD	1.6456	(0.0005)	(0.03)
USD-JPY	104.92	0.12	0.12



Domestic News

- ❖The online advertising market in India is projected to reach Rs 3,575 crore by end of FY15 with a year-on-year growth of 30 per cent, primarily driven by spending on search and display ads, said a study. (BS)
- ❖Cash-strapped Kingfisher Airlines has been directed by the Delhi High Court to pay one of its former pilots over Rs 29 lakh, the amount of his outstanding salary with interest for the period from March 2012 to July 26, 2012. (BS)
- ❖Indian companies have mopped-up close to Rs 17,000 crore through institutional placement in the first four months of the 2014-15 fiscal, primarily to support working capital needs. (BS)

Domestic News (Cont...)

❖ Cancer drug major Fresenius Kabi Oncology Ltd, the Indian arm of Germany-based Fresenius Kabi, has withdrawn revocation petitions against cancer drug patents owned by Pfizer and its subsidiaries as the former has "lost business interest" in the molecules. (BS)

❖ The domestic scooter market is getting revved up with improving quality of roads in both the rural and urban areas. (BS)

❖ International Finance Corporation (IFC), a member of the World Bank Group, has invested \$27.5 million (about Rs 165 crore) in Lucid Colloids to fund expansion plans of Mumbai-based guar gum producer. (BS)

❖ Forklift and Material Handling Equipment manufacturer, Voltas Material Handling announced that it will operate under the name of "KION India Private Limited". (BS)

❖ Sunningdale Tech Ltd (Sunningdale Tech) is planning to acquire 100% stake in Anchorage Singapore Holdings Pte Ltd (ASH), the ultimate holding company of First Engineering Limited (FEL), along with a facility in Chennai. The deal is estimated to be \$80 million. (BS)

❖ Private Equity (PE) investment in Real Estate sector is likely to exceed Rs 12,000 crore (around \$ 2 billion) by the end of 2014, according to Cushman & Wakefield estimate. (BS)

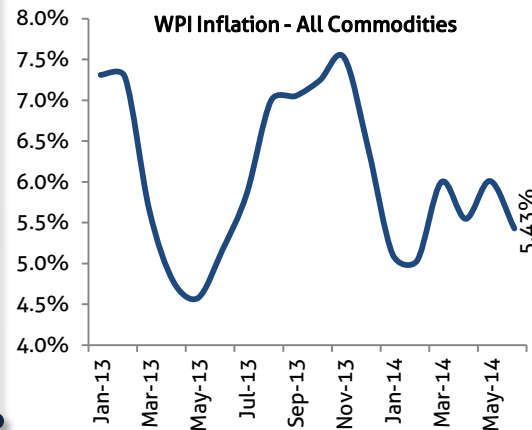
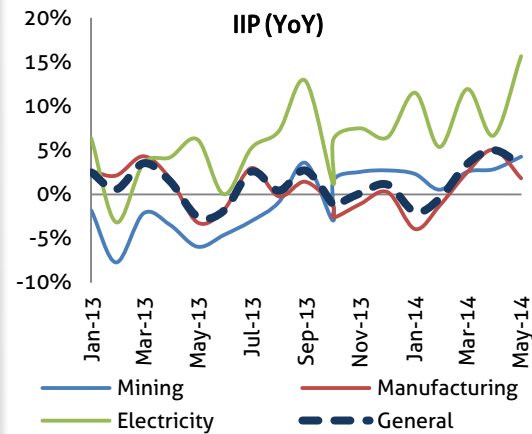
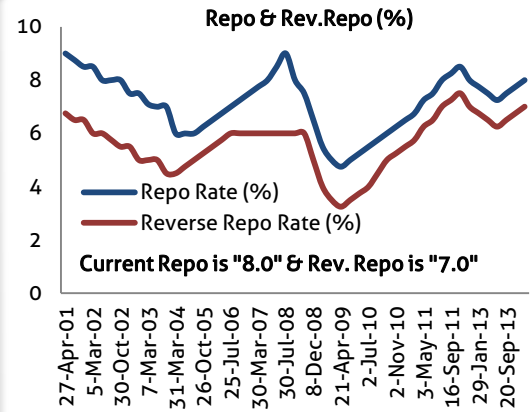
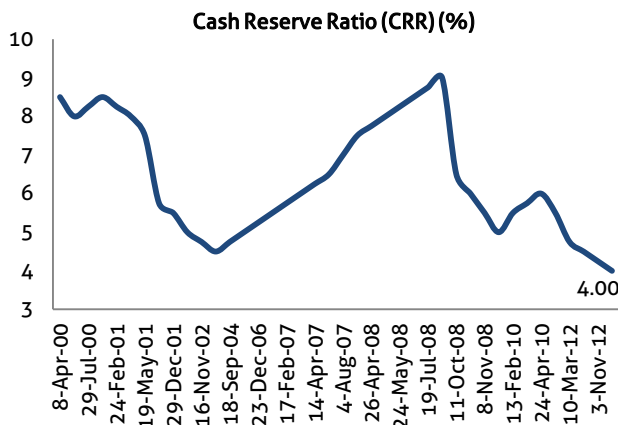
❖ NAC Jewellers is planning to intensify its brand building exercise targeting to establish the brand in South India in the next three years. (BS)

❖ IT services provider HCL Technologies has been selected by Sydney Trains as a strategic partner to provide bespoke systems support services, the company said. (BS)

❖ Home textiles firm Himatsingka Seide said it is looking to double turnover from its branded portfolio to Rs 1,200 crore by next fiscal. (BS)

❖ Hyderabad-based bio-pharmaceutical company Suven Life Sciences Limited has secured one product patent each from South Korea, China and Canada corresponding to the new chemical entities (NCEs) for the treatment of disorders associated with neurodegenerative diseases. (BS)

❖ The country's largest car maker Maruti Suzuki India, known for compact cars, is aiming for the top slot in mid-sized sedan segment with its upcoming model Ciaz. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Sep-14	IndusInd Bank Ltd.	MORGAN STANLEY ASIA (SINGAPORE) PTE	BUY	3400000	612.0
3-Sep-14	Redington (India) Limited	HARROW INVESTMENT HOLDING LIMITED	SELL	10744370	97.1
3-Sep-14	Jaiprakash Associates Lim	JAYPEE INFRA VENTURES (A PRIVATE COMPANY WITH UNLIMITED LIA	SELL	13489693	46.3
3-Sep-14	Housing Development and I	MERRILL LYNCH CAPITAL MARKETS ESPANA S.A. SVB	BUY	3570600	95.5
3-Sep-14	Bhushan Steel Limited	IDFC LIMITED	SELL	3108000	96.0

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Sep-14	BAJAJELEC	JWALAMUKHI INVESTMENT HOLDINGS	S	972,000	292.0
3-Sep-14	CIGNITI	VENKATA RAO PENNAM	S	550,000	366.5
3-Sep-14	PVR	MORGAN STANLEY ASIA SINGAPORE PTE	B	265,000	720.0
3-Sep-14	SASKEN	ASHISH DHAWAN	S	150,868	300.0
3-Sep-14	DOLPHINOFF-\$	MADHUKAR CHIMANLAL SHETH	S	155,277	100.8

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
506260	ANUHPHR	04-Sep-14	Final Dividend - Rs.6.50	-
506260	ANUHPHR	04-Sep-14	Final Dividend - Rs.6.50	-
506260	ANUHPHR	04-Sep-14	Interim Dividend - Rs.2.00	-
506260	ANUHPHR	04-Sep-14	Interim Dividend - Rs.2.00	-
531847	ASTAR-\$	04-Sep-14	Dividend - Rs.1.50	-
503722	BANSWRAS-\$	04-Sep-14	Dividend - Rs.3.00	-
532834	CAMLFIN	04-Sep-14	Stock Split from Rs.2/- to Re.1/-	05-Sep-14
522295	CONTROLPR-\$	04-Sep-14	Dividend - Rs.2.50	-
532760	DEEPIND	04-Sep-14	Dividend - Rs.1.00	-
500495	ESCORTS	04-Sep-14	Final Dividend - Rs.0.60	-
500033	FORCEMOT	04-Sep-14	Dividend - Rs.3.00	-
526367	GANESHHOUC	04-Sep-14	Dividend - Rs.2.60	-
501455	GREAVESCOT	04-Sep-14	Interim Dividend - Rs.1.40	05-Sep-14
532333	HBPOR	04-Sep-14	Dividend - Rs.1.50	-
526217	HITECHPLAS-\$	04-Sep-14	Dividend - Rs.0.90	-
532209	J&KBANK	04-Sep-14	Stock Split from Rs.10/- to Re.1/-	05-Sep-14
506910	JAYSYN	04-Sep-14	Dividend - Rs.0.20	-
506943	JBCHEPHARM	04-Sep-14	Dividend - Rs.3.00	-
532605	JBMA	04-Sep-14	Dividend - Rs.3.00	-
532940	JKIL	04-Sep-14	Dividend - Rs.3.75	-
533451	KARMAENG	04-Sep-14	Dividend - Rs.0.50	-
532924	KOLTEPATIL	04-Sep-14	Final Dividend - Rs.1.60	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Sep-14	JPY	Manufacturing PMI		52.4	52.4
01-Sep-14	CNY	HSBC Manufacturing PMI		50.3	50.3
01-Sep-14	EUR	Manufacturing PMI		50.8	50.8
01-Sep-14	GBP	BoE Consumer Credit		0.550B	0.418B
01-Sep-14	GBP	Business Investment (QoQ)		2.00%	5.00%
01-Sep-14	GBP	Manufacturing PMI		55	55.4
01-Sep-14	GBP	Mortgage Approvals		67K	67K
02-Sep-14	EUR	PPI (MoM)		-0.10%	0.10%
02-Sep-14	USD	Manufacturing PMI			58
02-Sep-14	USD	Construction Spending (MoM)		1.00%	-1.80%
02-Sep-14	USD	ISM Manufacturing PMI		56.9	57.1
03-Sep-14	USD	MBA 30-Year Mortgage Rate			4.28%
03-Sep-14	USD	ISM - NY Business Conditions			644.4
03-Sep-14	USD	Factory Orders (MoM)		11.00%	1.10%
03-Sep-14	USD	Beige Book			
04-Sep-14	JPY	Interest Rate Decision		0.10%	0.10%
04-Sep-14	GBP	BoE QE Total			375B
04-Sep-14	GBP	Interest Rate Decision		0.50%	0.50%
04-Sep-14	EUR	Interest Rate Decision		0.15%	0.15%
04-Sep-14	USD	ADP Nonfarm Employment Change		220K	218K
04-Sep-14	USD	Initial Jobless Claims		300K	298K
04-Sep-14	USD	Trade Balance		-42.20B	-41.50B
04-Sep-14	USD	ISM Non-Manufacturing PMI		57.6	58.7
05-Sep-14	EUR	GDP (YoY)		0.70%	0.70%
05-Sep-14	USD	Nonfarm Payrolls		220K	209K
05-Sep-14	USD	Unemployment Rate		6.10%	6.20%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Sep-14	INR	HSBC Markit Manufacturing PMI		52.9	53
01-Sep-14	INR	Infrastructure Output (YoY)			7.30%
03-Sep-14	INR	HSBC Services PMI			52.2
03-Sep-14	INR	M3 Money Supply			13.30%
05-Sep-14	INR	Bank Loan Growth			11.60%
05-Sep-14	INR	FX Reserves, USD			318.58B

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