

| Equity       | Latest | % Chg  | NSE Sect. Indices          | Latest     | % Chg      |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty        | 6695   | (0.02) | CNX IT                     | 9320       | 0.99       |
| Sensex       | 22404  | (0.06) | BANK NIFTY                 | 12842      | (0.11)     |
| DowJones     | 16513  | (0.28) | S&P CNX 500                | 5261       | 0.10       |
| Nasdaq       | 4124   | (0.09) | CNX FMCG                   | 17538      | (0.20)     |
| Hangseng     | 22261  | 0.57   | CNX REALTY                 | 180        | 0.22       |
| Shanghai     | 2026   | 0.30   | CNX AUTO                   | 5849       | (0.30)     |
| Nikkei       | 14458  | (0.19) | CNX ENERGY                 | 8299       | (0.14)     |
| Strait Times | 3253   | (0.37) | CNX PHARMA                 | 8157       | 0.70       |
| Kospi        | 1959   | (0.12) | <b>Advances / Declines</b> | <b>BSE</b> | <b>NSE</b> |
| Taiwan       | 8867   | 0.86   | Advances                   | 1387       | 745        |
| FTSE         | 3178   | (0.65) | Declines                   | 1340       | 718        |
| CAC          | 6822   | 0.20   | Unchanged                  | 131        | 84         |
| DAX          | 4458   | (0.65) | Total                      | 2858       | 1547       |

| Nifty Gainers |           |        |
|---------------|-----------|--------|
| Company       | Price(Rs) | Chg(%) |
| TATAPOWER     | 80.05     | 2.50   |
| LUPIN         | 1011.60   | 2.22   |
| HCLTECH       | 1430.05   | 1.94   |
| BPCL          | 463.25    | 1.84   |
| NMDC          | 152.90    | 1.80   |

| Nifty Losers |           |        |
|--------------|-----------|--------|
| Company      | Price(Rs) | Chg(%) |
| JINDALSTEL   | 240.75    | (5.68) |
| SSLT         | 180.05    | (2.86) |
| TATASTEEL    | 390.90    | (2.43) |
| LT           | 1262.90   | (2.41) |
| MARUTI       | 1881.00   | (2.18) |

| Vol. Shockers    | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|------------------|-----------------|------------------|------------------|
| Fulford India-\$ | 1.40            | 0.2              | 7                |
| Heidelbergcement | 12.18           | 1.8              | 7                |
| GOLDBEES         | 0.57            | 0.1              | 6                |
| Kajaria Cerm     | 2.01            | 0.4              | 6                |
| Cera Sanitary    | 0.65            | 0.1              | 5                |

| Indian Forex | Closing | Chg     | % Chg  |
|--------------|---------|---------|--------|
| USD/INR      | 60.225  | (0.112) | (0.19) |
| GBP/INR      | 101.684 | 0.232   | 0.23   |
| EUR/INR      | 83.459  | 0.153   | 0.18   |
| JPY/INR      | 58.770  | (0.160) | (0.27) |

| Precious Metal  | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm)  | 29700   | (25)      |
| Silver (Rs/1kg) | 41400   | (495)     |

| Commodities      | Price  | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 99.8   | 0.36   |
| Brent (US\$/BBL) | 108.6  | 0.79   |
| Gold (US/oz)     | 1302.9 | 1.55   |
| Silver (US\$/oz) | 19.6   | 2.73   |
| Copper (US\$/MT) | 6699.0 | 0.43   |
| Alum (US\$/MT)   | 1736.5 | 0.00   |
| Zinc(US\$/MT)    | 2012.5 | (0.64) |

| ADR              | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank       | 42.71      | (0.06) |
| HDFC Bank        | 40.31      | 0.10   |
| Infosys          | 53.47      | 0.15   |
| Sterlite Inds.   | 6.22       | 0.00   |
| Dr. Deddy's Labs | 45.88      | 0.60   |
| Wipro            | 12.03      | 0.10   |
| Tata Motors      | 37.42      | 0.10   |

## Market Sensor

US market stocks declined on Friday, losing gains that had lifted the Dow industrials and the S&P 500 above their record closes, as rising unrest in Ukraine offset a better-than-expected April jobs report. Dow Jones Industrial Average was down 0.28% or 45.98 points at 16512.89. Nasdaq Composite was down 0.09% or 3.55 points at 4123.90. Standard & Poor's 500 was down 0.13% or 2.54 points at 1881.14.

Indian Equity market d to remain volatile amid range bound trade. Investors remained cautious over escalating tensions in Ukraine. With few days left before Union Election results traders seems to be booking profit on higher level. Nifty ended the previous trading session with a decline of 0.02% or 1.60 points at 6694.80. On Friday's trading session, FII's bought net Rs.386.95 Cr in cash market and bought net Rs.746.99 in derivative segment. Whereas, DII sold net Rs.405.65 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, with crucial intraday support exists at 6665 followed by 6600 while resistance is seen at 6760 followed by 6820.**

## Global News

❖ America's job-creation machine kicked into higher gear in April as employers boosted payrolls by the most in two years and the jobless rate plunged to the lowest since the collapse of Lehman Brothers. (Bloomberg)

❖ Federal Reserve Chair Janet Yellen and her colleagues have lowered their sights on how fast the economy needs to expand to meet their goal of cutting unemployment. (Bloomberg)

❖ Italian companies remain financially vulnerable as risks ranging from low inflation to shifts in foreign investment could threaten economic growth, the Bank of Italy said. (Bloomberg)

❖ Even the strongest job growth in two years isn't enough to entice more people into the labor force, one of the biggest conundrums of the U.S. economic expansion. (Bloomberg)

❖ The euro-area unemployment rate held near a record, even as manufacturing grew at the fastest pace in three months, adding to mixed signals about the 18-nation currency bloc's recovery. (Bloomberg)

❖ Mark Carney's grip on the Monetary Policy Committee is about to be tested as officials discuss new forecasts, freed from their low interest-rate pledge. (Bloomberg)

## Economic News

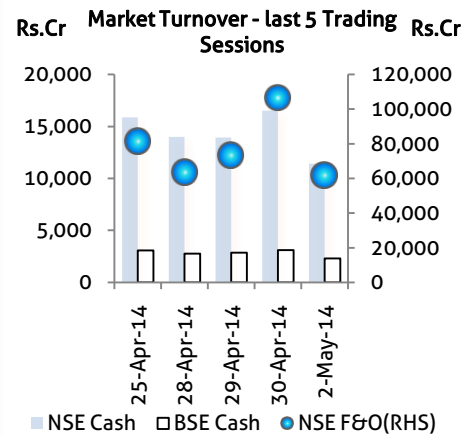
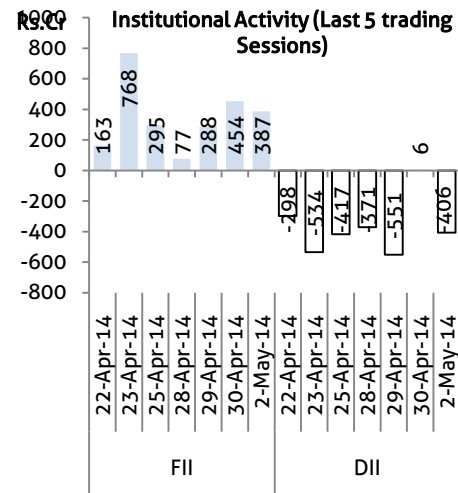
- ❖ The Odisha government has recommended to the Centre a proposal by its PSU Odisha Industrial Infrastructure Development Corporation (Idco) to set up a sea food park at Deras in Khurda district. (BS)
- ❖ The government is likely to overshoot its FY14 fiscal deficit estimate by 0.2-0.3% to 4.8- 4.9% as tax revenues have not been up to expectations, DBS said. (BS)
- ❖ Almost a year after the Kazakhstan government played spoilsport in a deal where ONGC Videsh was to acquire 8.4% stake in its Kashagan oil field, India is in talks with that country for developing Abai oil block in the Caspian Sea. (BS)
- ❖ The Coal Ministry has made amendments in certain clauses of the bidding document pertaining to the three coal blocks put for auction. (BS)
- ❖ There is rethinking over the proposed Forward Contracts Regulation Act 1952 Bill which may get a quiet burial. (BS)
- ❖ Indian SMEs are expected to increase cloud adoption at a CAGR of 20 % by 2016, the report by EY and Assocham said. (BS)
- ❖ The CBI Thursday questioned former coal secretary P.C. Parakh over the coal block allocation scam, sources said. (BS)
- ❖ The State industrial corridor project has yet to take off, as elections in a row have delayed it. Also, very few proposals have come up for Bhopal-Bina and Jabalpur-Singarauli industrial corridors. (BS)
- ❖ The Reserve Bank is unlikely to ease rates till early 2015 as the possibility of a below-average monsoon will make it difficult to contain inflation at the targeted 8% by next January, rating agency Icra said. (BS)
- ❖ Finance professionals in India are optimistic about the economy amid signs that foreign direct investment (FDI) is rising again, says a survey (BS)
- ❖ The loss on sale of diesel has climbed to Rs 6.80 even as state-owned oil companies for the second time skipped the monthly price increase on government diktat. (BS)

## Domestic News

- ❖ Nokia India, which has been fighting legal battle in various forums related to tax disputes in the country, has said that the company would now appeal to the division bench against a part of the Madras High Court order on the Rs 2,400 crore tax issue between the company and the State sales tax department. (BS)
- ❖ CNG price in the national capital was hiked by Rs 2.95 per kg and piped cooking gas by Re 1 due to a rise in input cost. (BS)
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- ❖ Terming the FIR by erstwhile AAP government on gas pricing as "motivated" and a "political" gimmick, Reliance Industries Ltd (RIL) moved the Delhi High Court seeking its quashing on the ground that the issue fell within the domain of the Centre and is well beyond the power of the state government. (BS)
- ❖ Ranbaxy Laboratories is recalling 29,790 blister packs of anti-allergy drug in the US, manufactured by its arm Ohms Laboratories, due to defective packaging. (BS)

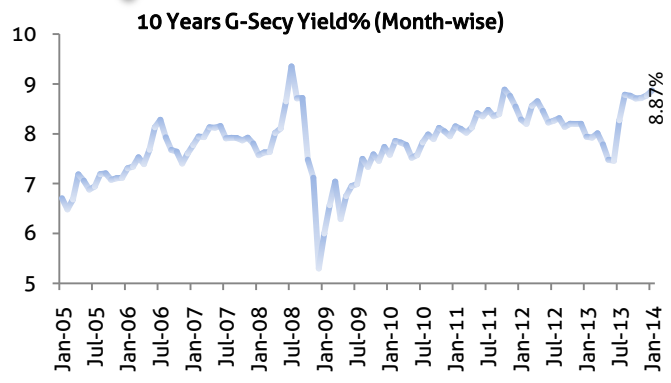
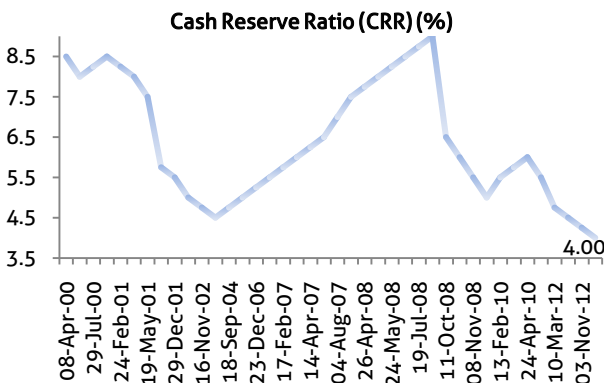
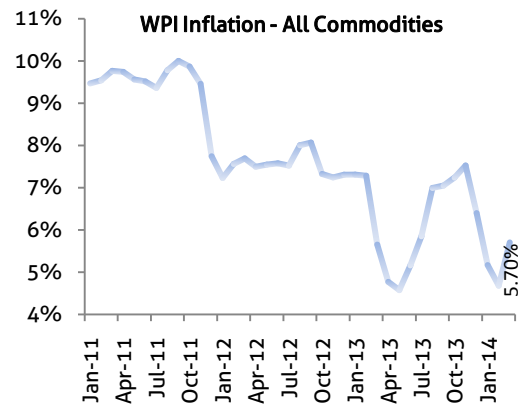
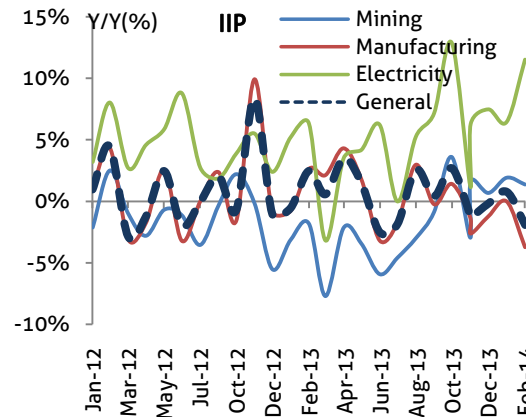
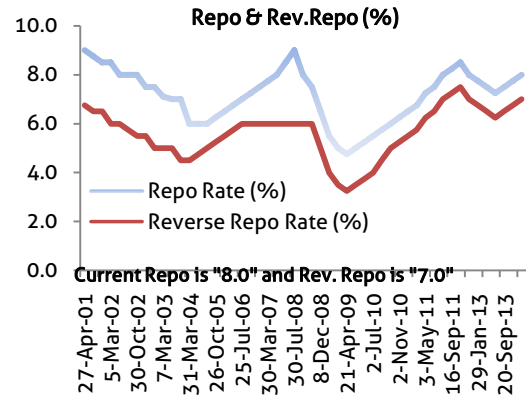
| Global Forex | Closing | Chg      | % Chg  |
|--------------|---------|----------|--------|
| EUR-USD      | 1.3869  | (0.0010) | (0.01) |
| GBP-USD      | 1.6870  | (0.0023) | (0.14) |
| USD-JPY      | 102.20  | (0.13)   | (0.13) |

| Bond Markets   | Closing | Chg       |
|----------------|---------|-----------|
| 10-yr bond     | 8.97    | -1.4 bps  |
| Interbank call | 8.35    | -42.0 bps |



## Domestic News (Cont...)

- ❖ Government-owned finance company IFCI Ltd plans to rope in strategic investor for its factoring subsidiary, IFCI factorsLtd, to give a new lease of life to a unit facing a rough times. (BS)
- ❖ AVT Lifestyle Products Pvt Ltd, a company in which the city's well known jeweller Vummidi Bangaru Jewellers (VBJ) has majority stake, has launched Za Amor, an e-commerce jewellery portal to sell VBJ tested diamond jewels to the online customers. (BS)
- ❖ The state government has asked National Aluminium Company (Nalco) to initiate steps for executing a metal sales agreement with Bahrain-based Midal cables, which intends to set up its wire rod factory in the state in the proposed aluminium park. (BS)
- ❖ Realty firm Puravankara Projects Ltd has sold 50% stake in its upcoming project at Kochi to Sobha Developers for Rs 326 crore. (BS)
- ❖ State-owned SAIL said its sales in April rose 14% at 8.1 lakh tonnes as against 7.09 LT in the same period of last year. (BS)
- ❖ Social networking site Facebook has acquired Helsinki-based fitness tracking app Moves in an undisclosed deal. (BS)
- ❖ Existing inventory and stable demand led to an eight% decline in number of residential units being launched in the first quarter of calendar year 2014 in Ahmedabad. (BS)
- ❖ Thomas Mitchell, general manager supply chain, DistributedPower, GE believes that India's power sector has been a tad slow to grow, but is still not ready to give up. (BS)
- ❖ Aiming to enter the Indian retail market, Netherlands-headquartered BurlingtonEnglish and Muthoot Holiday, an arm of the Muthoot group, have signed an MoU for marketing online English language teaching engine. (BS)
- ❖ Commercial vehicle manufacturer Ashok Leyland Ltd has posted a drop of 21% in sales during the month of April, 2014 as against the sales during the same month of previous year. (BS)
- ❖ The termination of the contract from The Travelers Companies, its largest client has come has a big jolt for EXLService. (BS)
- ❖ With the Supreme Court asking state owned power generator, NTPC and two BSES-controlled power distribution companies to sort out their differences, an early end to the dispute may not be possible with both the sides hardening their stand on the matter. (BS)



## Bulk Deal - NSE

| Date     | Security Name            | Client Name                               | Buy/Sell | Traded Qty. | Price |
|----------|--------------------------|---|----------|-------------|-------|
| 2-May-14 | Unitech Ltd              | SUNTECK WEALTHMAX CAPITAL PRIVATE LIMITED | SELL     | 14127552    | 16.0  |
| 2-May-14 | Venus Remedies Limited   | SUNEV PHARMA SOLUTIONS LTD                | SELL     | 161096      | 330.0 |
| 2-May-14 | Astra Microwave Products | HDFC MF A/C HDFC GROWTH FUND              | BUY      | 660000      | 75.8  |
| 2-May-14 | Tata Sponge Iron Ltd.    | IDFC INVESTMENT ADVISORY LTD              | BUY      | 83500       | 572.2 |
| 2-May-14 | Dr. Datson's Labs Ltd    | ARUNA DINESH SHAH                         | SELL     | 200900      | 23.9  |

## Bulk Deal - BSE

| Date     | Security Name    | Client Name                              | Buy/Sell | Traded Qty. | Price  |
|----------|------------------|--|----------|-------------|--------|
| 2-May-14 | Century Ply-\$   | MARUTI TRADERS AND INVESTORS             | S        | 1,800,000   | 38.0   |
| 2-May-14 | Channel Nine     | LUNAR BUILDERS PRIVATE LIMITED           | B        | 86,000      | 496.3  |
| 2-May-14 | Fulford India-\$ | AXIS MUTUAL FUND                         | S        | 32,551      | 1195.0 |
| 2-May-14 | Comfort Fincap   | AARUSH HOMES AND INFRASTRUCTURES LIMITED | B        | 136,300     | 145.7  |
| 2-May-14 | SIEL             | SANKET KANDOI                            | B        | 83,000      | 228.7  |

## Corporate Actions

| Scrip Code | Scrip Name          | Ex-Date   | Purpose                        | Record Date |
|------------|---------------------|-----------|--------------------------------|-------------|
| 500043     | Bata India          | 05-May-14 | Dividend - Rs.6.50             | -           |
| 511288     | Gruh Finance        | 05-May-14 | Dividend - Rs.3.00             | -           |
| 532960     | Indiabulls Sec      | 05-May-14 | Interim Dividend - Rs.1.00     | 06-May-14   |
| 504959     | Stovec Inds         | 05-May-14 | Final Dividend - Rs.15.00      | -           |
| 532622     | Gateway Distr       | 06-May-14 | 2nd Interim Dividend - Rs.3.00 | 07-May-14   |
| 532424     | Godrej Cons         | 06-May-14 | Interim Dividend - Rs.2.25     | 07-May-14   |
| 535789     | IBUL HSG FIN        | 06-May-14 | Interim Dividend - Rs.9.00     | 07-May-14   |
| 532832     | Indiabulls Real Est | 06-May-14 | 3rd Interim Dividend - Rs.1.00 | 07-May-14   |
| 521248     | Kitex Garments      | 07-May-14 | Dividend - Rs.1.00             | -           |
| 532663     | Sasken Comm         | 07-May-14 | Interim Dividend - Rs.3.00     | 08-May-14   |
| 590031     | De Nora India       | 08-May-14 | Dividend - Rs.4.00             | -           |
| 532129     | Hexaware Tech       | 09-May-14 | Interim Dividend - Rs.3.00     | 12-May-14   |
| 500530     | Bosch               | 12-May-14 | Dividend - Rs.55.00            | -           |
| 523457     | LINDEINDIA          | 12-May-14 | Dividend - Rs.1.50             | -           |
| 500790     | Nestle India        | 15-May-14 | Final Dividend - Rs.12.50      | -           |
| 500790     | Nestle India        | 15-May-14 | Interim Dividend - Rs.-        | -           |
| 500188     | Hindustan Zinc      | 19-May-14 | Final Dividend - Rs.1.90       | -           |
| 520056     | Sundaram Clayton    | 19-May-14 | 3rd Interim Dividend - Rs.-    | 20-May-14   |
| 500413     | Thomas Cook         | 21-May-14 | Final Dividend - Rs.0.38       | -           |
| 523445     | Reliance Indl Infra | 26-May-14 | Dividend - Rs.3.50             | -           |
| 590043     | Harita Seat-\$      | 27-May-14 | Interim Dividend - Rs.-        | 28-May-14   |
| 500209     | Infosys             | 29-May-14 | Final Dividend - Rs.43.00      | -           |

## Global Economic Calendar

| Date      | Curr. | Event                          | Actual | Forecast | Previous |
|-----------|-------|--------------------------------|--------|----------|----------|
| 05-May-14 | CNY   | Chinese HSBC Manufacturing PMI |        |          | 48.3     |
| 05-May-14 | EUR   | PPI (YoY)                      |        | -1.70%   | -1.70%   |
| 05-May-14 | USD   | Services PMI                   |        |          | 54.2     |
| 05-May-14 | USD   | ISM Non-Manufacturing PMI      |        | 54.1     | 53.1     |
| 06-May-14 | EUR   | Services PMI                   |        | 53.1     | 53.1     |
| 06-May-14 | GBP   | Services PMI                   |        | 57.6     | 57.6     |
| 06-May-14 | EUR   | Retail Sales (MoM)             |        | -0.20%   | 0.40%    |
| 06-May-14 | USD   | Trade Balance                  |        | -40.40B  | -42.30B  |
| 07-May-14 | CNY   | Chinese HSBC Services PMI      |        |          | 51.9     |
| 07-May-14 | USD   | MBA 30-Year Mortgage Rate      |        |          | 4.49%    |
| 08-May-14 | USD   | Consumer Credit                |        | 15.45B   | 16.49B   |
| 08-May-14 | GBP   | RICS House Price Balance       |        | 56%      | 57%      |
| 08-May-14 | CNY   | Chinese Trade Balance          |        | 11.00B   | 7.71B    |
| 08-May-14 | GBP   | BoE QE Total                   |        |          | 375B     |
| 08-May-14 | GBP   | Interest Rate Decision         |        |          | 0.50%    |
| 08-May-14 | EUR   | Interest Rate Decision         |        | 0.25%    | 0.25%    |
| 08-May-14 | USD   | Continuing Jobless Claims      |        | 2,765K   | 2,771K   |
| 08-May-14 | USD   | Initial Jobless Claims         |        | 325K     | 344K     |
| 09-May-14 | CNY   | Chinese CPI (YoY)              |        | 2.10%    | 2.40%    |
| 09-May-14 | CNY   | Chinese PPI (YoY)              |        | -1.80%   | -2.30%   |
| 09-May-14 | GBP   | Industrial Production (YoY)    |        | 2.40%    | 2.70%    |
| 09-May-14 | GBP   | Manufacturing Production (YoY) |        | 2.90%    | 3.80%    |
| 09-May-14 | GBP   | Trade Balance                  |        | -9.00B   | -9.09B   |
| 09-May-14 | USD   | Wholesale Inventories (MoM)    |        | 0.50%    | 0.50%    |

## Indian Economic Calendar

| Date      | Curr. | Event                    | Actual | Forecast | Previous |
|-----------|-------|--------------------------|--------|----------|----------|
| 05-May-14 | INR   | Indian HSBC Services PMI |        |          | 47.5     |
| 09-May-14 | INR   | Trade Balance            |        |          |          |

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