

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8057	(0.49)	CNX IT	11128	1.73
Sensex	26599	(0.44)	BANK NIFTY	17377	(2.37)
DowJones	17924	0.46	S&P CNX 500	6617	(0.96)
Nasdaq	4946	0.53	CNX FMCG	19542	0.26
Hangseng	27485	0.71	CNX REALTY	3329	(2.48)
Shanghai	4158	1.10	CNX AUTO	7986	(1.28)
Nikkei	19351	0.31	CNX ENERGY	8318	(1.41)
Strait Times	3452	0.56	CNX PHARMA	11874	(1.36)
Kospi	2092	0.03	Advances / Declines	BSE	NSE
Taiwan	9724	0.20	Advances	773	291
FTSE	6887	(0.67)	Declines	1901	1199
CAC	4967	(0.29)	Unchanged	106	47
DAX	11408	0.51	Total	2780	1537

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HCLTECH	923.50	3.63
TCS	2550.00	3.53
ACC	1447.90	2.45
AMBUJACEM	231.60	2.12
COALINDIA	360.55	2.11

Nifty Losers		
Company	Price(Rs)	Chg(%)
BANKBARODA	153.35	(5.43)
KOTAKBANK	1301.00	(3.72)
IDFC	155.45	(3.57)
ONGC	317.10	(3.29)
YESBANK	794.45	(3.24)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
LKPFIN	6.48	0.1	66
FDC	5.31	0.1	40
ANUHPHR	2.19	0.2	14
PHOENIXLL	5.03	0.5	11
FRL	24.89	3.6	7

Indian Forex	Closing	Chg	% Chg
USD/INR	63.880	0.238	0.37
GBP/INR	97.206	0.400	0.41
EUR/INR	72.510	1.001	1.40
JPY/INR	53.470	0.370	0.70

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26983	78
Silver (Rs/1kg)	37592	(88)

Commodities	Price	% Chg.
Crude (US\$/BBL)	58.9	(2.47)
Brent (US\$/BBL)	65.6	(2.40)
Gold (US/oz)	1183.3	(0.32)
Silver (US\$/oz)	16.3	(0.73)
Copper (US\$/MT)	6437.0	0.57
Alum (US\$/MT)	1915.5	(2.35)
Zinc(US\$/MT)	2382.0	(0.96)

ADR	Cl. Values	% Chg.
ICICI Bank	10.31	(0.02)
HDFC Bank	55.34	0.16
Infosys	30.82	0.20
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	51.86	(0.61)
Wipro	11.54	0.07
Tata Motors	39.96	(0.12)

Market Sensor

US market closed higher on Thursday as investors awaited the key April jobs report and eyed easing in oil prices and bond yields. Dow Jones Industrial Average on Wednesday was up 0.46% or 82.08 points at 17924.06. Nasdaq Composite was up 0.53% or 25.90 points at 4945.54 Standard & Poor's 500 was up 0.38% or 7.85 points at 2088.00.

Indian equity market remained under pressure and concern over rising oil prices, rupee depreciation and re-embodiment of Greece issue had been haunting the market. Uncertainty over GST bill still lingers which cleared in Lok Sabha, but is likely to be placed in the Rajya Sabha, where the BJP led NDA is in a minority. Nifty ended the previous day with a decline 0.49% or 39.70 at 8057.30. On Thursday's trading session, FIIs sold Rs.1360.69 Cr in cash market and bought net Rs.530.43 in derivative segment. Whereas, DII bought net Rs.1158.02 Cr in cash segment.

Global News

❖The Greek government will stick to the "red line" promises it made to its electorate and not make concessions in negotiations with creditors, it said. Spokesman Gabriel Sakellaridis told the press in Athens that labour and pension issues are non negotiable. (BBC)

❖European bond prices have dropped in a widespread sell off, sending investor returns higher, as markets brace for the return of inflation. (BBC)

❖The chair of the US Federal Reserve, Janet Yellen, has warned stock market levels present "potential dangers". She said current valuations, which have seen key US and UK indicators reach record levels, were "quite high". (BBC)

❖China's leaders, caught off guard by a sharp economic slowdown and worried about the risk of job losses, are likely to resort to fiscal stimulus to revive growth after a run of monetary policy easings proved less effective, policy insiders said. (Reuters)

❖Japan's government will not include new tax hikes, except for a planned increase in the sales tax in April 2017, in its fiscal reform plan due as early as June, the Asahi newspaper reported on Friday. (Reuters)

❖While Britain's politicians are likely to be struggling to form a government next week, the Bank of England will look further ahead and consider whether markets are too relaxed about the prospect of higher interest rates. (Reuters)

Economic News

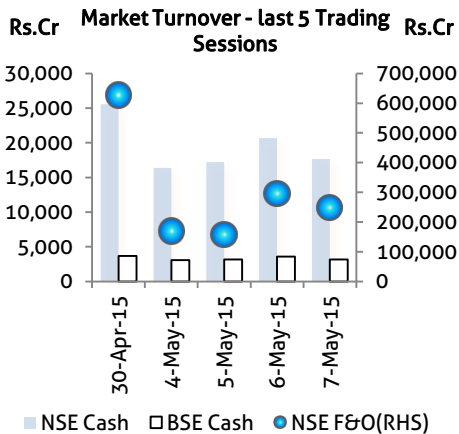
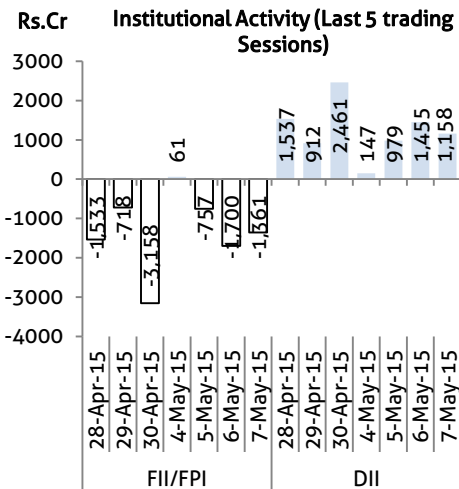
- ❖ In a first of its kind, India and Japan are going to soon set up a Logistics Data Bank (LDB) service that will ensure speedy movement of two-way merchandise trade by way of real-time tracking of container and cargo movement in the Delhi-Mumbai Industrial Corridor (DMIC) region. (BS)
- ❖ Oil refineries will need to invest Rs 80,000 crore in upgrading petrol and diesel quality to meet cleaner Euro-IV/V fuel specifications by 2020. (BS)
- ❖ The Narendra Modi-led National Democratic Alliance (NDA) government on Wednesday got the Bill for implementation of a goods & services tax (GST) regime passed in the Lok Sabha. And chances are, with better floor management and greater coordination with Opposition parties, it will be able to get it through the Rajya Sabha, too. (BS)
- ❖ India has moved up 13 notches to 52nd position on a global list of countries in terms of their travel and tourism competitiveness, but ranks worse than its emerging market peers like China, Brazil, Russia and South Africa. (BS)
- ❖ Global consultancy firm Gartner estimated that the government's technology spend in 2015 will jump 5.7 per cent to \$6.8 billion on the back of IT services growth. (BS)
- ❖ The Reserve Bank may cut rate by 25 basis point even before its monetary policy review on June 2 as inflation is easing and the US Fed tightening is expected by year end, SBI said in a research note. (BS)
- ❖ The International Monetary Fund (IMF) will soon send a team to India to get a grasp of the implementation of the government's new GDP methodology, which has been questioned in certain quarters, including RBI. (BS)
- ❖ Although India's near-term growth outlook has improved, its medium-term prospects remain constrained by long standing structural weakness, the IMF said, describing the country as a new bright spot in Asia. (BS)
- ❖ Prime Minister Narendra Modi sank his finance minister's plans to strip powers from the Reserve Bank of India (RBI) last week, sources told Reuters, evidence of a new-found respect for the bank's governor and a recognition that Modi needs his calming influence on markets. (BS)

Domestic News

- ❖ Muthoot Fincorp, the flagship company of Muthoot Pappachan Group is planning to raise Rs 1,800 crore through Private Equity (PE) and public issue of Non-Convertible Debentures (NCDs) in the current fiscal. (BS)
- ❖ State Bank of Hyderabad (SBH), an associate bank of the State Bank of India (SBI), said it has registered a 33.43 per cent increase in net profit at Rs 445.51 crore for the quarter ended March, 2015 as compared with Rs 333.89 crore in the corresponding quarter last year. (BS)
- ❖ Bio-technology major Biocon said that it has made clinical progress in its partnered programmes with Mylan, a British pharma major. (BS)
- ❖ Titan Company Ltd, the watches to jewellery and eye wear to precision engineering products maker from the Tata Group, on Thursday reported a marginal growth of 4.3 per cent in net profit at Rs 215 crore for the fourth quarter ended March 2015 compared to Rs 206 crore in the corresponding quarter last year. The drop in profit is being largely attributed to a decline in sales due to poor consumer sentiment during the quarter. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1214	(0.0053)	(0.47)
GBP-USD	1.5484	0.0239	1.57
USD-JPY	119.94	0.20	0.17

Bond Markets	Closing	Chg
10-yr bond	7.96	5.30 bps
Interbank call	7.88	45.34bps



Domestic News (Cont...)

❖ Jet Airways, India's premier international airline has launched a premium cargo product that offers customers an express service on the airline's domestic network to send urgent shipments within a defined time frame. (BS)

❖ Vedantu, a six-month old live online tutoring platform said the company has raised \$5 million (around Rs 32 crore) in Series A funding from Accel Partners and Tiger Global Management. (BS)

❖ Two-wheeler manufacturer Hero MotoCorp posted a 14% decline in net profit at Rs 476 crore for the quarter ending March 2015. It was Rs 554 crore in the same period a year ago. (BS)

❖ A number of fertiliser companies have been found to have violated norms of the nutrient based subsidy scheme (NBS) by not importing subsidised non urea fertiliser for the last two years. (BS)

❖ Enterprise cloud software company Ramco Systems has raised \$52 million, (Rs 325 crore) through qualified institutional placement to repay a portion of its debt, to support operational expenses to attract the right talent and to strengthen its marketing efforts in global markets. (BS)

❖ IIFL posted a 62% growth year on year in consolidated net profit for the fourth quarter ended March 31, 2015 at Rs 131.7 crore. The consolidated income for the same period recorded a growth of 34% to Rs 1,056.7 crore. (BS)

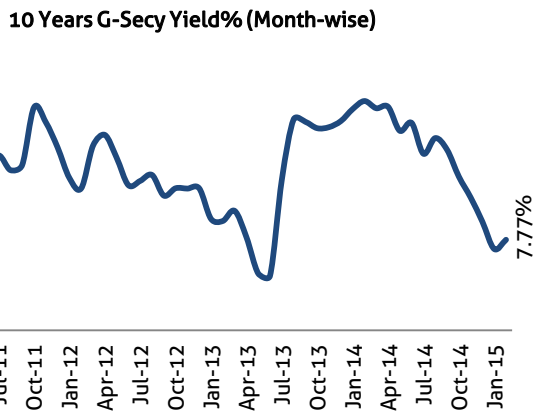
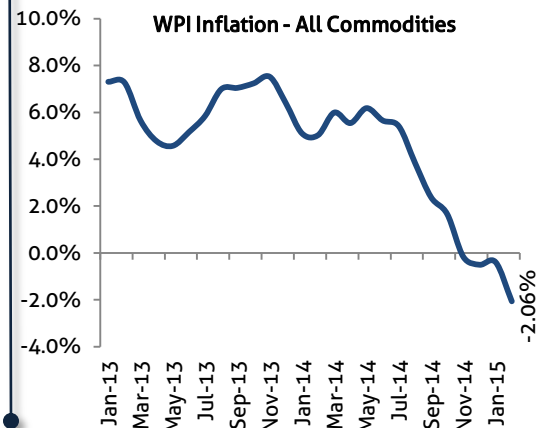
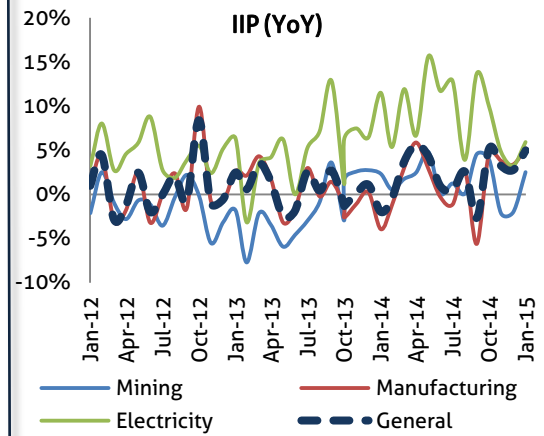
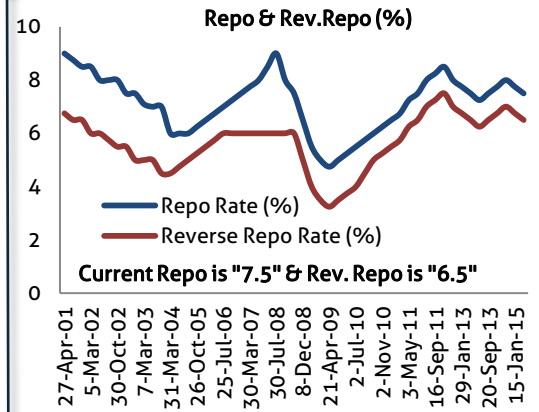
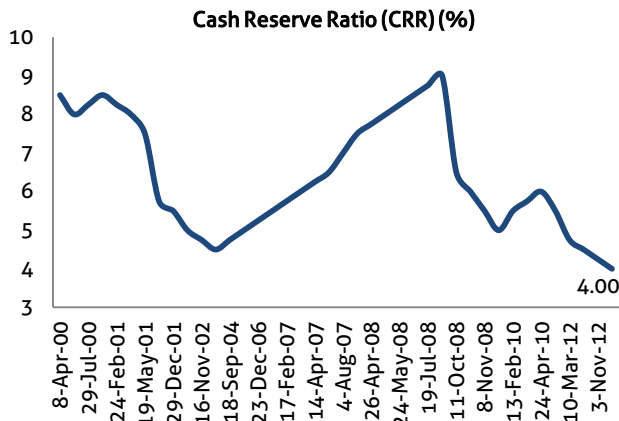
❖ The near two-year old court battle between YES Bank and Madhu Kapur may finally come to an end in the Bombay high court on May 12. (BS)

❖ Textiles and plastic firm Sintex Industries reported an increase of 22.71 per cent in its consolidated net profit to Rs 197.78 crore for the fourth quarter ended March 31. (BS)

❖ Professional networking site, LinkedIn said it has crossed 30 million-user mark in India, its largest market outside the US. (BS)

❖ Infosys co-founder Kris Gopalakrishnan has invested an undisclosed amount in Chennai-based speech recognition solutions company Uniphore Software Systems in a Series A round of funding. (BS)

❖ Mumbai-based online test preparation startup Toppr.com has raised \$10 million in a fresh funding round led by Fidelity Growth Partners India and existing investors, SAIF Partners and Helion Ventures. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
7-May-15	Gulf Oil Lub. Ind. Ltd.	GULF OIL INTERNATIONAL MAURITIUS INC	BUY	800000	450.0
7-May-15	GVK Power & Infrastructur	VERTEX PROJECTS LIMITED	BUY	35874500	8.5
7-May-15	BEML Limited	MERRILL LYNCH CAPITAL MARKETS ESPANA S.A. SVB	SELL	228675	866.9
7-May-15	Dr. Datson's Labs Ltd	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	SELL	2768528	12.6
7-May-15	Phoenix Lamps Limited	NAGARAJ GARIMELLA(PMS)	SELL	191217	113.1

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
7-May-15	ANUHPHR	L P SHAH HOLDINGS AND TRADES LLP	S	184,804	675.0
7-May-15	LKPFIN	SEAGLIMPSEINVESTMENTSPRIVATELTD	B	591,105	83.0
7-May-15	ANUHPHR	LALIT POPATLAL SHAH	B	69,404	676.3
7-May-15	INDSWFTLAB	GAJJAR NITIN I	B	249,808	34.5
7-May-15	GOLDCOINH	BHAVIN SHAILESH KAMANI	S	23,421	200.4

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
507488	GMBREW	08-May-15	Dividend - Rs.2.50	-
500189	HINDUJAVEN	08-May-15	Interim Dividend - Rs.15.00	11-May-15
500325	RELIANCE	08-May-15	Dividend - Rs.10.00	-
532475	APTECHT	11-May-15	Interim Dividend - Rs.1.75	12-May-15
531233	RASIELEC	11-May-15	Stock Split from Rs.10/- to Rs.2/-	12-May-15
500188	HINDZINC	12-May-15	Final Dividend - Rs.2.50	-
520056	SUNCLAYLTD	13-May-15	3rd Interim Dividend - Rs.-	14-May-15
532200	MYSOREBANK	14-May-15	Final Dividend - Rs.1.00	-
538713	ATISHAY	18-May-15	Dividend - Rs.0.60	-
590068	KHAITANLTD	18-May-15	E-Voting	-
500790	NESTLEIND	19-May-15	Final Dividend - Rs.12.50	-
500790	NESTLEIND	19-May-15	Interim Dividend - Rs.-	-
590043	HARITASEAT-\$	22-May-15	Interim Dividend - Rs.-	25-May-15
523445	RIIL	26-May-15	Dividend - Rs.3.50	-
532735	RSYSTEMINT*	03-Jun-15	Final Dividend - Rs.0.95	-
532893	VTMLTD	03-Jun-15	Dividend - Rs.0.63	-
532174	ICICIBANK	04-Jun-15	Dividend - Rs.5.00	-
500168	GOODYEAR	11-Jun-15	Dividend - Rs.10.00	-
500209	INFY	15-Jun-15	Final Dividend - Rs.29.50	-
511288	GRUH	16-Jun-15	Dividend - Rs.2.00	-
530959	DIANATEA	17-Jun-15	Dividend - Rs.0.25	-
532144	WELCORP	18-Jun-15	Dividend - Rs.0.50	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
04-May-15	EUR	Manufacturing PMI (Apr)		51.9	51.9
04-May-15	USD	Factory Orders (MoM) (Mar)		2.00%	0.20%
05-May-15	GBP	Construction PMI (Apr)		57.5	57.8
05-May-15	EUR	PPI (YoY) (Mar)		-2.30%	-2.80%
05-May-15	USD	Trade Balance (Mar)		-40.30B	-35.40B
05-May-15	USD	Markit Composite PMI (Apr)			57.4
05-May-15	CNY	HSBC Services PMI (Apr)			52.3
06-May-15	EUR	Markit Composite PMI (Apr)		53.5	53.5
06-May-15	EUR	Retail Sales (YoY) (Mar)			3.00%
06-May-15	USD	Nonfarm Productivity (QoQ) (Q1)		-2.00%	-2.20%
07-May-15	USD	Initial Jobless Claims			262K
07-May-15	USD	Consumer Credit (Mar)		16.00B	15.52B
07-May-15	CNY	Trade Balance (Apr)			3.08B
08-May-15	GBP	Trade Balance (Mar)		-9.80B	-10.34B
08-May-15	USD	Unemployment Rate (Apr)		5.40%	5.50%
08-May-15	USD	Wholesale Inventories (MoM) (Mar)		0.30%	0.30%
08-May-15	CNY	CPI (YoY) (Apr)			1.40%
08-May-15	CNY	PPI (YoY) (Apr)			-4.60%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
04-May-15	INR	HSBC Markit Manufacturing PMI (Apr)			52.10
06-May-15	INR	HSBC Services PMI (Apr)			53.00

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