

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8511	(0.13)	CNX IT	11144	(0.59)
Sensex	28172	(0.13)	BANK NIFTY	18799	(0.14)
DowJones	17777	0.53	S&P CNX 500	7051	0.11
Nasdaq	4997	0.11	CNX FMCG	20384	0.04
Hangseng	23920	(4.23)	CNX REALTY	3581	(0.08)
Shanghai	3522	(5.50)	CNX AUTO	8489	(0.34)
Nikkei	20068	(1.52)	CNX ENERGY	8914	(1.09)
Strait Times	3313	(0.84)	CNX PHARMA	3826	(0.51)
Kospi	2014	(1.27)	Advances / Declines	BSE	NSE
Taiwan	9032	(2.36)	Advances	1675	915
FTSE	6432	(1.58)	Declines	1147	593
CAC	4605	(2.27)	Unchanged	124	54
DAX	10677	(1.96)	Total	2946	1562

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ASIANPAINT	827.00	5.55
COALINDIA	430.20	2.49
ULTRACEMCO	3156.15	1.74
TECHM	472.15	1.64
HDFC	1335.20	1.34

Nifty Losers		
Company	Price(Rs)	Chg(%)
HCLTECH	938.20	(3.27)
VEDL	158.55	(2.97)
NTPC	134.45	(2.57)
HINDALCO	106.90	(1.97)
HEROMOTOCO	2567.00	(1.78)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
ORTEL	3.63	0.0	184
DEEPAKNI	9.52	0.1	99
GRANULES	114.50	1.8	65
RADICO	11.23	0.3	40
SAURASHCEM	45.05	2.0	23

Indian Forex	Closing	Chg	% Chg
USD/INR	63.375	(0.204)	(0.32)
GBP/INR	98.859	(0.248)	(0.25)
EUR/INR	69.966	(0.326)	(0.46)
JPY/INR	51.670	(0.220)	(0.42)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26005	(76)
Silver (Rs/1kg)	35822	58

Commodities	Price	% Chg.
Crude (US\$/BBL)	52.2	(1.47)
Brent (US\$/BBL)	56.8	(0.86)
Gold (US/oz)	1152.6	(1.33)
Silver (US\$/oz)	14.9	(4.98)
Copper (US\$/MT)	5440.5	(2.32)
Alum (US\$/MT)	1645.0	0.06
Zinc(US\$/MT)	2001.5	0.48

ADR	Cl. Values	% Chg.
ICICI Bank	10.38	(0.02)
HDFC Bank	62.45	0.67
Infosys	15.86	(0.02)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	59.14	1.42
Wipro	12.08	(0.02)
Tata Motors	33.06	(0.75)

Market Sensor

US market closed higher on Tuesday after a choppy trading session as investors eyed developments in the Greece debt crisis and the start of corporate earnings season. Dow Jones Industrial Average was up 0.53% or 93.33 points at 1776.91. Nasdaq Composite was up 0.11% or 5.52 points at 4997.46. Standard & Poor's 500 was up 0.61% or 12.58 points at 2081.34.

Indian equity market took a pause yesterday and ended almost flat amid intraday volatility. Greece concern keep the market in a narrow band till there is clarity to resolve Greece crisis while China continued its southbound journey of the last few sessions. Nifty ended the previous day with a decline of 0.13% or 11.35 at 8510.80. On Tuesday's trading session, FIIs bought Rs.23.54 Cr in cash market and bought net Rs.1873.13 in derivative segment. Whereas, DII sold net Rs.94.71 Cr in cash segment.

Global News

❖ The pace of growth in the U.S. services ticked higher in June after dropping to a 13-month low in May, as reads on business activity and new orders improved, an industry report showed on Monday. The Institute for Supply Management said its services sector index increased to 56.0, just short of analysts' expectations of 56.2 in a Reuters survey, from 55.7 in May. (CNBC)

❖ The U.S. government needs to implement greater financial reforms under the Dodd-Frank Act in order to address new risks, the International Monetary Fund said Tuesday. (CNBC)

❖ The U.S. trade deficit widened in May, fueled by a drop in exports that could heighten concerns over weak overseas demand and a strong U.S. dollar. The increase in the trade gap to \$41.9 billion, announced on Tuesday by the Commerce Department, was less than analysts had expected. (CNBC)

❖ Euro zone members have given Greece until the end of the week to come up with a proposal for sweeping reforms in return for loans that will keep the country from crashing out of Europe's currency bloc and into economic ruin. (Reuters)

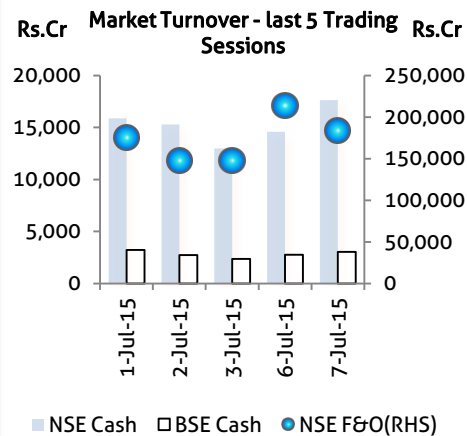
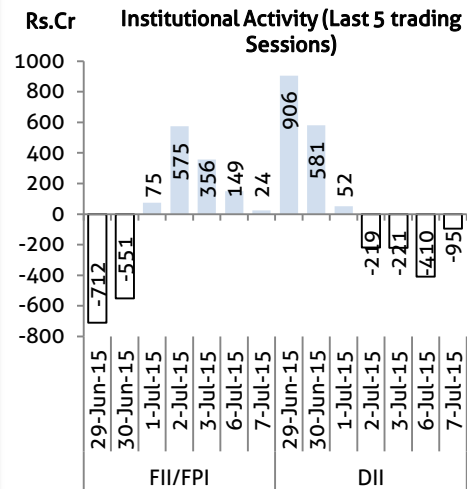
❖ Chinese Premier Li Keqiang said on Monday that China had the confidence and ability to deal with the risks and challenges faced by its economy, according to a statement on the central government's website. (Reuters)

Economic News

- ❖ India is likely to sign the inter- governmental pact for the US tax compliance law FATCA on Thursday, a move that will help it fight tax evasion. (BS)
- ❖ Former President A P J Abdul Kalam inaugurated a 250 kilowatt (kw) mini solar power system in Kannauj district of Uttar Pradesh. (BS)
- ❖ Concerned over price rise in pulses and other commodities, the Centre asked state governments to take stringent action against hoarders and boost supply in "vulnerable areas" prone to shortages. (BS)
- ❖ India has overtaken the US to become the world's third largest steel producer and is working towards achieving 300 million tonnes (MT) target in the next 10 years, Union Steel & Mines Minister Narendra Singh Tomar said . (BS)
- ❖ Exporters and importers will be allowed to pay their fees and penalties through debit or credit cards from this week, a move aimed at further improving the ease of doing business in India. (BS)
- ❖ Indian markets are "over-rating" the contribution of the pending GST and land acquisition reforms to the growth and it is rate cuts by RBI which actually hold the key for an immediate recovery, Bank of America Merrill Lynch said . (BS)
- ❖ Oilmeals export fell by 34 per cent during last month to 1.37 lakh tonnes due to historical low shipments of soyameal on account of high domestic prices, according to industry data. (BS)
- ❖ Energy-hungry India is looking to import liquefied natural gas (LNG) from Canada to meet its requirements. (BS)
- ❖ Amid forecast of deficit rains this month, the government asked farmers not to panic as contingency plans are put in place to handle any adverse impact of a possible poor monsoon on kharif crops. (BS)
- ❖ The government said it is considering importing 5,000 tonnes of urad dal to improve domestic availability and check price rise. (BS)
- ❖ Even as the IMD predicts a sub-normal monsoon this year, its impact on rural spending will be less severe than what it used to be a decade ago or earlier, says India Ratings and Research (Ind-Ra). (BS)
- ❖ Declining borrowing costs, improving employment outlook and availability of affordable housing projects are encouraging prospective home buyers to purchase new properties in 2015, a survey has said. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.0986	(0.0028)	(0.25)
GBP-USD	1.5434	(0.0029)	(0.18)
USD-JPY	122.19	(0.3600)	(0.30)

Bond Markets	Closing	Chg
10-yr bond	7.89	-1.50 bps
Interbank call	7.02	2.13 bps



Domestic News

- ❖ Tata Consultancy Services (TCS) subsidiary CMC posted Rs 56.28 crore net profit for the quarter ended June 30, 2015, a decline of 3.7 per cent compared with Rs 58.42 crore reported in the same period a year ago as large subcontracting and outsourcing cost eroded its profit margins. (BS)
- ❖ Reliance Industries Ltd (RIL) will sell 3.10 per cent stake in media and entertainment firm Network18 tomorrow at a floor price of Rs 53.40 per share, which would fetch the company at least Rs 173.55 crore. (BS)
- ❖ The Intellectual Property Appellate Board (IPAB) has set aside an order of the Assistant Controller of Patents and Designs, Mumbai, which refused patent for domestic drug major Lupin for its chewable antibiotic drug Cefixime. Lupin has its brand Suprax with Cefixime as ingredient and is sold in chewable tablets and suspension forms. (BS)

Domestic News (Cont...)

❖ The Intellectual Property Appellate Board (IPAB) has set aside an order of the Patent Office, which revoked a patent granted to Hindustan Unilever Ltd related to a water purification system following an opposition raised by Eureka Forbes Limited. (BS)

❖ E-commerce major Flipkart will go the Myntra way, the company it had acquired last year, by operating only through mobile app from September. (BS)

❖ The Delhi High Court asked the government to resume the supply of gas to Deepak Fertilisers and Petrochemicals Corporation Limited (DFPCL) plant in Maharashtra which was disconnected in May 2014, saying the policy should be implemented "uniformly and without discrimination". (BS)

❖ The used car market in India is large with about \$10bn worth of cars being sold every year, but 85 per cent of all used cars sold are sold through unorganised channels. (BS)

❖ Steering itself through a market meltdown in China and the Greece crisis, Indian markets are now at the doorstep of the June quarter earnings season. (BS)

❖ Etihad has emerged as the fastest growing international airline to India with over 55% capacity addition over last August. (BS)

❖ United Spirits has sold United Breweries' shares worth Rs 872 crore to Heineken, the promoter of the beer company. With this, Heineken's stake has gone up from 39% to 42.2%. The UB group holds 35.81% stake in the company. (BS)

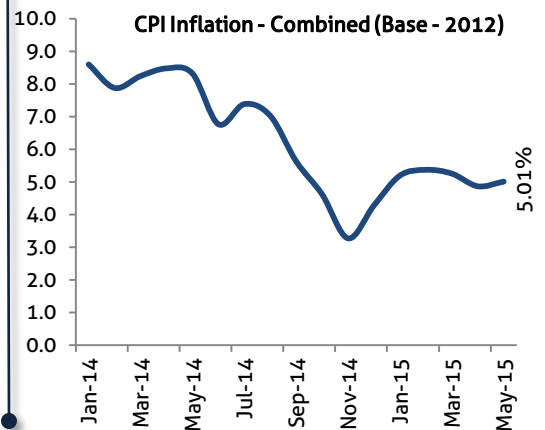
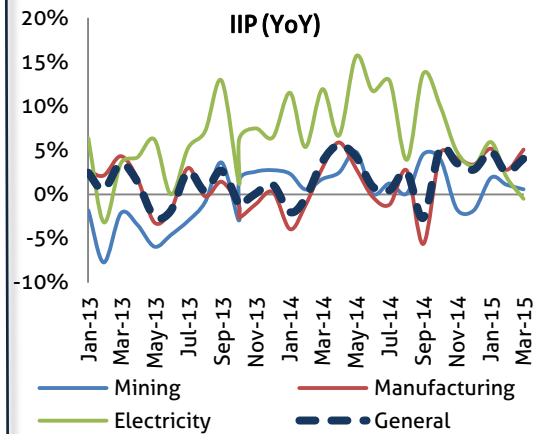
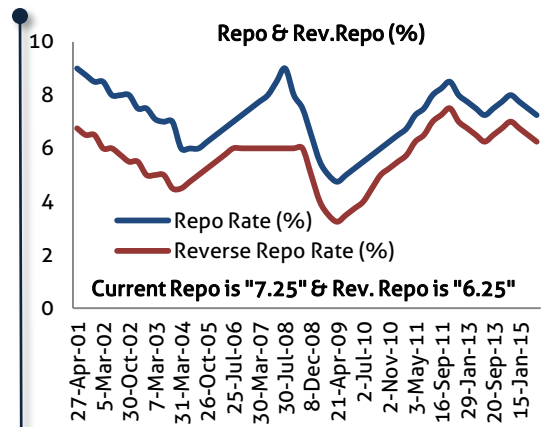
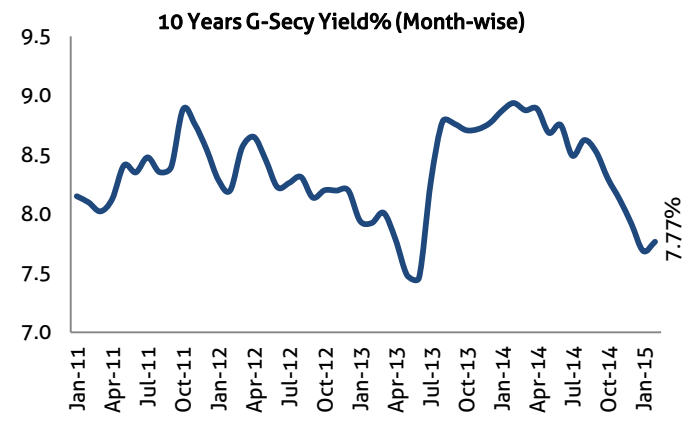
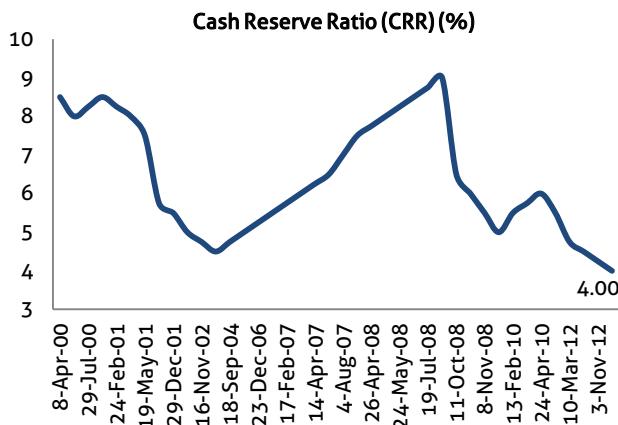
❖ Apollo India Pvt Equity II (Mauritius) Ltd has reduced its stake in direct-to-home services provider Dish TV by 4.4 per cent through sale of 4.69 crore shares worth Rs 497 crore. (BS)

❖ The buss that Tata Chemicals is planning to sell its fertiliser business has cheered the street. The stock gained more than 5% immediately after the news and another 2% thereafter. (BS)

❖ Global wind major Gamesa announced its entry into the solar market with a 10 MW order. (BS)

❖ Growth appetite of Indian companies is waning which is evident from the absence of big bang strategic acquisitions in mergers and acquisitions (M&A) league tables. (BS)

❖ A mobile solution that helps cab drivers find optimised routes to ferry employees to and from the office has helped several Bengaluru companies cut logistics costs. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
7-Jul-15	United Breweries Limited	HEINEKEN INTERNATIONAL B.V.	BUY	8500000	1030.0
7-Jul-15	Granules India Limited	MORGAN STANLEY ASIA (SINGAPORE) PTE	SELL	4330000	86.8
7-Jul-15	Mahindra Holidays & Resor	RELIANCE MUTUAL FUND	BUY	1143400	254.0
7-Jul-15	Ortel Communications Ltd	KOTAK MAHINDRA OLD MUTUAL LIFE INSURANCE LTD	SELL	261174	186.0
7-Jul-15	Elder Pharma Ltd	BP FINTRADE PRIVATE LIMITED	SELL	308623	130.2

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
7-Jul-15	GRANULES	INVESTCO MANAGEMENT LLC	S	8,830,000	83.0
7-Jul-15	SAURASHCEM	MAURITIUS DEBT MANAGEMENT LIMITED	S	3,197,508	48.8
7-Jul-15	ORTEL	KOTAK MAHINDRA OLD MUTUAL LIFE INSURANCE LIMITED	S	261,400	186.0
7-Jul-15	FERVENTSYN	VIJAY PRAVINCHANDRA THAKKAR	S	359,600	76.1
7-Jul-15	HIGHGROUND	ABHEEK PROPERTIES PRIVATE LIMITED	S	58,521	391.7

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532792	CAIRN	08-Jul-15	Final Dividend - Rs. - 4.0000	-
526705	ELEMARB	08-Jul-15	Final Dividend - Rs. - 2.0000	-
500469	FEDERALBNK	08-Jul-15	Bonus issue 1:1	09-Jul-15
526797	GREENPLY	08-Jul-15	Dividend - Rs. - 3.0000	-
500247	KOTAKBANK	08-Jul-15	Bonus issue 1:1	09-Jul-15
532652	KTKBANK	08-Jul-15	Dividend - Rs. - 5.0000	-
538970	MANVIJAY	08-Jul-15	Bonus issue 1:1	09-Jul-15
533152	MBLINFRA	08-Jul-15	Final Dividend - Rs. - 3.0000	-
532521	PALRED	08-Jul-15	Reduction of Capital	09-Jul-15
526921	21STCENMGM	09-Jul-15	Final Dividend - Rs. - 2.0000	-
532215	AXISBANK	09-Jul-15	Dividend - Rs. - 4.6000	-
532977	BAJAJ-AUTO	09-Jul-15	Dividend - Rs. - 50.0000	-
532978	BAJAJFINSV	09-Jul-15	Dividend - Rs. - 1.7500	-
500490	BAJAJHLDNG	09-Jul-15	Dividend - Rs. - 32.5000	-
500034	BAJFINANCE	09-Jul-15	Dividend - Rs. - 18.0000	-
523229	BHARATSE	09-Jul-15	Dividend - Rs. - 0.9000	-
523019	BNRSEC	09-Jul-15	Dividend - Rs. - 1.5000	-
532175	CYIENT	09-Jul-15	Final Dividend - Rs. - 5.0000	-
532927	ECLERX	09-Jul-15	Dividend - Rs. - 35.0000	-
509525	EMPIND	09-Jul-15	Dividend - Rs. - 24.0000	-
511676	GICHSGFIN	09-Jul-15	Dividend - Rs. - 5.0000	-
517063	JETKING	09-Jul-15	Final Dividend - Rs. - 1.0000	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
6-Jul-15	JPY	Leading Index (MoM) (May)			1.20%
6-Jul-15	EUR	Retail PMI			51.4
6-Jul-15	EUR	Sentix Investor Confidence (Jul)		15	17.1
6-Jul-15	USD	Markit Composite PMI (Jun)			54.6
6-Jul-15	USD	Services PMI (Jun)			54.8
6-Jul-15	USD	CB Employment Trends Index (Jul)			128.6
6-Jul-15	USD	ISM Non-Manufacturing Business Activity (Jun)		60	59.5
6-Jul-15	USD	ISM Non-Manufacturing PMI (Jun)		56.3	55.7
7-Jul-15	GBP	Industrial Production (YoY) (May)		1.60%	1.20%
7-Jul-15	GBP	Manufacturing Production (YoY) (May)		1.80%	0.20%
7-Jul-15	USD	Trade Balance (May)		-42.30B	-40.90B
8-Jul-15	USD	Consumer Credit (May)		18.25B	20.54B
8-Jul-15	JPY	Current Account n.s.a. (May)		1.542T	1.326T
8-Jul-15	USD	MBA 30-Year Mortgage Rate			4.26%
8-Jul-15	USD	FOMC Meeting Minutes			
9-Jul-15	GBP	RICS House Price Balance (Jun)		37%	34%
9-Jul-15	JPY	Core Machinery Orders (YoY) (May)		16.30%	3.00%
9-Jul-15	CNY	CPI (YoY) (Jun)		1.30%	1.20%
9-Jul-15	CNY	PPI (YoY) (Jun)		-4.50%	-4.60%
9-Jul-15	JPY	Machine Tool Orders (YoY)			15.00%
9-Jul-15	GBP	BoE QE Total (Jul)		375B	375B
9-Jul-15	GBP	Interest Rate Decision (Jul)		0.50%	0.50%
9-Jul-15	USD	Bloomberg Consumer Confidence			
9-Jul-15	USD	Initial Jobless Claims			
10-Jul-15	JPY	CGPI (YoY) (Jun)		-2.30%	-2.10%
10-Jul-15	GBP	Trade Balance (May)		-9.80B	-8.56B
10-Jul-15	USD	Wholesale Inventories (MoM) (May)		0.30%	0.40%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
8-Jul-15	INR	M3 Money Supply (2wk)			11.10%
10-Jul-15	INR	Bank Loan Growth (2wk)			9.80%
10-Jul-15	INR	Deposit Growth (2wk)			11.70%
10-Jul-15	INR	Industrial Production (YoY) (May)			4.10%

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