

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7649	(0.30)	CNX IT	10343	(1.35)
Sensex	25589	(0.30)	BANK NIFTY	14987	(0.15)
DowJones	16368	(0.46)	S&P CNX 500	6154	(0.33)
Nasdaq	4335	(0.46)	CNX FMCG	18522	(0.22)
Hangseng	24224	(0.67)	CNX REALTY	3494	(0.30)
Shanghai	2184	(0.16)	CNX AUTO	7016	(0.10)
Nikkei	14783	(2.95)	CNX ENERGY	9419	0.25
Strait Times	3282	(0.97)	CNX PHARMA	9115	(0.15)
Kospi	2028	(1.30)	Advances / Declines	BSE	NSE
Taiwan	9029	(1.12)	Advances	1304	389
FTSE	6597	(0.58)	Declines	1631	746
CAC	4150	(1.36)	Unchanged	117	42
DAX	9039	(1.00)	Total	3052	1177

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ACC	1473.70	2.97
JINDALSTEL	282.15	2.82
TATASTEEL	556.60	1.11
KOTAKBANK	940.70	0.91
BHEL	231.50	0.89

Nifty Losers		
Company	Price(Rs)	Chg(%)
PNB	924.80	(2.62)
INFY	3500.05	(2.12)
HCLTECH	1519.50	(1.82)
BANKBARODA	878.00	(1.64)
SSLT	284.05	(1.56)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Trent	0.48	0.0	46
Siemens	5.36	0.3	20
Merck	1.10	0.1	15
APL Apollo Tubes	2.30	0.2	14
Sundram Fast	6.78	0.6	12

Indian Forex	Closing	Chg	% Chg
USD/INR	61.412	0.076	0.12
GBP/INR	103.425	(0.013)	(0.01)
EUR/INR	82.167	0.204	0.25
JPY/INR	60.040	0.240	0.40

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28532	302
Silver (Rs/1kg)	43893	238

Commodities	Price	% Chg.
Crude (US\$/BBL)	97.8	0.78
Brent (US\$/BBL)	106.2	1.41
Gold (US/oz)	1315.7	0.59
Silver (US\$/oz)	20.0	(0.70)
Copper (US\$/MT)	6980.5	(0.21)
Alum (US\$/MT)	2014.5	1.56
Zinc(US\$/MT)	2320.0	(0.56)

ADR	Cl. Values	% Chg.
ICICI Bank	49.08	(0.51)
HDFC Bank	46.78	(1.01)
Infosys	57.15	0.88
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	44.69	0.41
Wipro	11.37	0.03
Tata Motors	38.65	(0.18)

Market Sensor

US stock ended lower on Thursday, continuing a recent streak of weakness as Russia's surprisingly harsh retaliatory measures in response to Western sanctions raised concerns about global growth. The Dow Jones industrial average fell 75.07 points, or 0.46 percent, to 16,368.27, the S&P 500 ended down 10.67 points, or 0.56 percent, to 1,909.57, and the Nasdaq Composite lost 20.09 points, or 0.46 percent, to 4,334.97.

The Indian stock markets edged lower after seeing wild intraday gyrations during the latter part of the trading session. The high intraday volatility on the domestic bourses during the latter part of the trading session stemmed from a similar trend in European markets which once slipped into the red after a brief intraday recovery after a weak start ahead of the outcome of monetary policy review from the European Central Bank and the Bank of England. The BSE Sensex fell 76.26 points or 0.3% to settle at 25,589.01 while CNX Nifty fell 22.80 points or 0.30% to settle at 7,649.25, lowest closing levels since 1 August 2014. On Thursday's trading session, FIIs sold net Rs. 73.07 Cr in cash market whereas, DIIs bought net Rs. 228.99 Cr in cash segment.

Indian markets are expected to trade in a range today, tracking muted trend seen in other Asian markets. Tracking the momentum, the index is expected to retest its crucial psychological support level of 7600 in trade today.

Global News

❖ Shen Zhihong arrived at Shanghai's Pudong International Airport looking forward to a vacation at the beach only to find his flight delayed indefinitely and his holiday plans at the mercy of the People's Liberation Army. (Bloomberg)

❖ Taiwan's economy minister Chang Chia-Juch offered his resignation yesterday, taking responsibility for gas explosions in southern Taiwan's Kaohsiung city that killed at least 30 people. (Bloomberg)

❖ Consumer borrowing rose in June as American households took out auto and student loans. The \$17.3 billion increase in consumer credit followed a \$19.6 billion May advance. (Bloomberg)

❖ Jobless claims in the U.S. probably have nowhere to go but up. Jobless claims unexpectedly decreased by 14,000 to 289,000 in the week ended Aug. 2, data from the Labor Department showed. The four-week average, a less-volatile measure, slid to 293,500. (Bloomberg)

Economic News

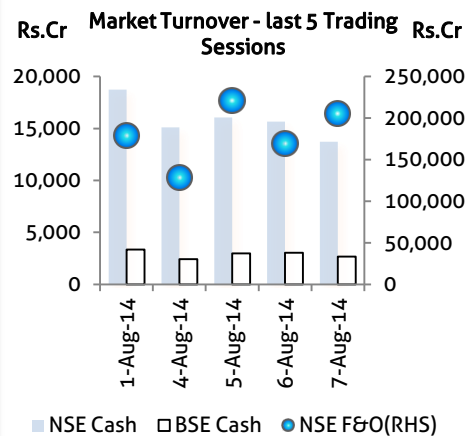
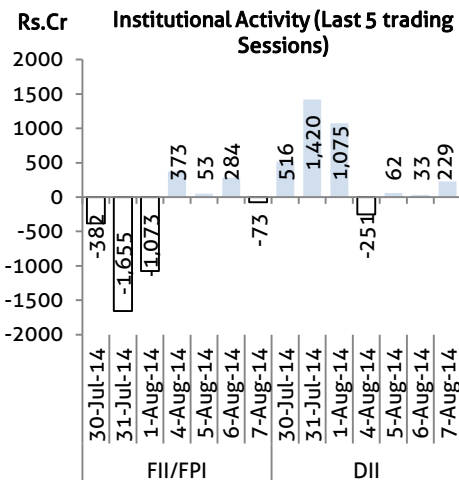
- ❖ A day after the government gave clearance for fully opening up the railway infrastructure segment to foreign investment, Railway Minister D V Sadananda Gowda made it clear that FDI will not be allowed in the operations sector of the national transporter. (BS)
- ❖ Nearly half of the country's coal-based power plants are reeling under fuel shortages and had stocks to last less than seven days as of July end, Lok Sabha was informed. (BS)
- ❖ Domestic rating agency India Ratings increased its FY15 GDP growth estimate marginally to 5.7% on a good show by the industrial sector, but said the government will not be able to meet its ambitious fiscal deficit target of 4.1%. (BS)
- ❖ The newly proposed gas price framework could increase power and urea prices by raising their cost of production. Analysts estimate the new gas price of \$6-6.5 per million British thermal units (mmbtu), if finalised, could push up cost of power generation by upto 26% with a 10 paise hike in electricity prices. (BS)
- ❖ Government is scrambling to crack down on a new gold smuggling tactic that it fears could accelerate a flood of illegal imports of the precious metal into the world's second-biggest buyer. (BS)
- ❖ The auction of three coal blocks has been cancelled as issues related to certain clearances need to be "revisited", the government said. (BS)
- ❖ Uttar Pradesh Chief Minister Akhilesh Yadav directed the power department to get all under-construction projects completed at the earliest so that they can start supplying power from next year. (BS)
- ❖ India's Trade Agreements with Asian countries have led to ballooning of trade deficit with these countries in non-tyre rubber products. Between FY 09 and FY 11, India signed three major trade agreements with Association of South-East Asian Nations (ASEAN), Korea and Japan. Trade deficit in non-tyre rubber products with these three trading partners has gone up from Rs 651 crore in FY 09 to Rs 1725 crore in FY 13, a growth of 165% in four years. (BS)
- ❖ Over 40 crore people living in eight crore households have not got electricity and the government is making all efforts to give them power connection as early as possible, Lok Sabha was told. (BS)
- ❖ Union Health Minister Dr Harsh Vardhan has announced a fresh government initiative to ensure that organs and tissues are collected scientifically from donors and distributed to patients-in-need at minimum cost. (BS)

Domestic News

- ❖ FMCG major Nestle India posted 6.07 per cent increase in net profit at Rs 287.86 crore for the second quarter ended June 30, 2014. (BS)
- ❖ Leading steel pipes manufacturer Welspun Corp, the flagship company of the Rs 18,000-crore Welspun Group, reported a net loss of Rs 97.5 crore for the three months to June against net profit of Rs 7.7 crore in the year-ago period. (BS)
- ❖ JK group firm JK Agri Genetics posted a marginal increase in net profit at Rs 25.34 crore for the first quarter of this fiscal on higher sales. (BS)
- ❖ India Cements Ltd has posted a net loss of Rs 2.96 crore during the quarter ended June 30, 2014, as against a net profit of Rs 16.82 crore during the same period of previous year. (BS)

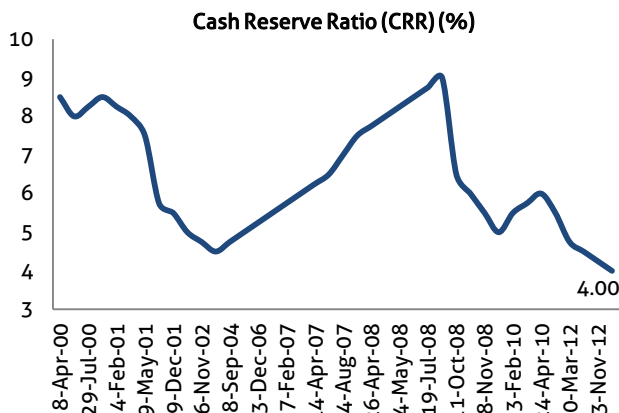
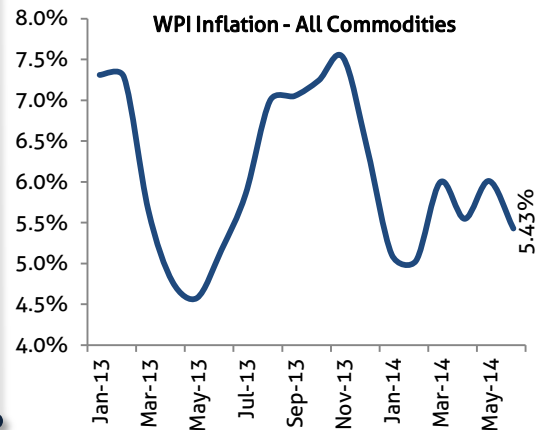
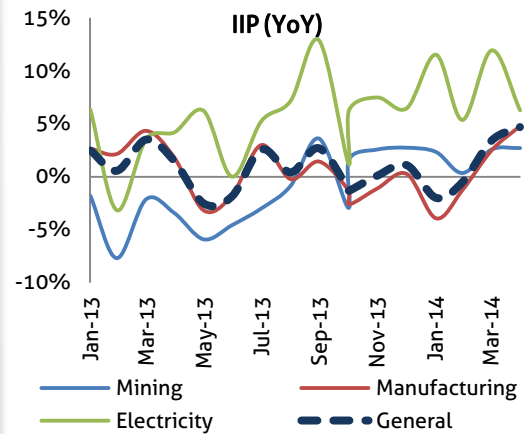
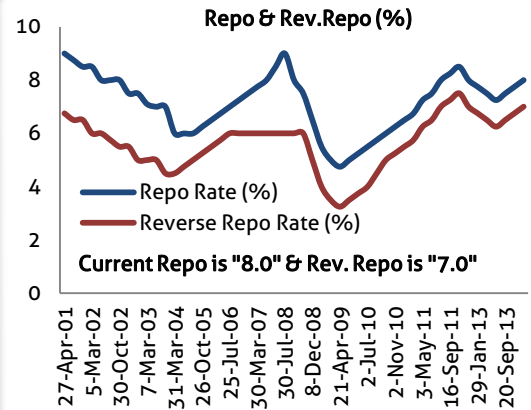
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3358	(0.0006)	(0.04)
GBP-USD	1.6811	(0.0022)	(0.13)
USD-JPY	101.70	(0.40)	(0.39)

Bond Markets	Closing	Chg
10-yr bond	8.80	-0.20 bps
Interbank call	7.99	-33.98 bps



Domestic News (Cont...)

- ❖ Vijay Mallya-controlled Mangalore Chemicals and Fertilizers Limited (MCF) announced that its net loss has come down to Rs 9.76 crore for the first quarter ended June 30, 2014 compared to a net loss of Rs 12.04 crore in the corresponding quarter last fiscal. (BS)
- ❖ SpiceJet has said it has completed reconfiguring a majority of its 53 aircraft fleet giving extra leg room to passengers in front five rows. The move is aimed to attract corporate clients. (BS)
- ❖ Tata group retail firm Trent Ltd reported over three-and-half-fold increase in standalone net profit at Rs 61.11 crore for the first quarter ended June 30, 2014-15, boosted by partial sale of stake in Trent Hypermarket to UK's Tesco. (BS)
- ❖ Ahmedabad-based pharmaceutical major Zydus Cadila has received the final approval from the US drug regulator to market Potassium Citrate tablets that are used in the prevention of kidney stones. (BS)
- ❖ Fortis Healthcare reported a consolidated net loss of Rs 46.8 crore for the first quarter ended June 30, 2014. (BS)
- ❖ Steel castings manufacturer Indsur Group has bagged an order worth Rs 500 crore from a Mexican firm to supply around one lakh metric tonne of steel plates. (BS)
- ❖ Jubilant Foodworks Ltd that runs food chains, including Domino's Pizza and Dunkin' Donuts in India, reported 18.47 per cent decline in standalone net profit at Rs 27.72 crore for the first quarter ended June 30, hurt by higher expenses. (BS)
- ❖ In a bid to deal with issue of splitting of wages by employers, retirement fund body EPFO has asked it's over 120 field formations to inspect firms which are deducting PF on 50% or less of total wages. (BS)
- ❖ Reliance Communications said it has received the first installment of Rs 650 crore from the promoter group for preferential allotment of 8.67 crore warrants aggregating Rs 1,300 crore. (BS)
- ❖ The Tata Group has retained its place as the country's most valuable brand at \$21 billion, while the total worth of top-100 Indian brands now stands at \$92.6 billion, says a new study. (BS)
- ❖ State-run United India Insurance has reported an increase of 8.54 per cent in its profit- after-tax at Rs 228.76 crore for the first quarter ended June 30, 2014. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
7-Aug-14	Himachal Fut Com Ltd	SADACHAR ADVISORY SERVICES LLP	BUY	7058827	15.1
7-Aug-14	Himachal Fut Com Ltd	NAGESHWAR ADVISORY SERVICES LLP	SELL	7058827	15.1
7-Aug-14	Gammon India Ltd.	HDFC TRUSTEE CO A/C HDFC INFRASTRUCTURE FUND	BUY	2000000	31.5
7-Aug-14	Gammon India Ltd.	J P MORGAN SECURITIES LTD AC COPTHALL MAURITIUS INVESTMENT	SELL	1000000	31.5
7-Aug-14	Gammon India Ltd.	WARHOL LIMITED	SELL	1000000	31.5

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
7-Aug-14	Hindustan Compo	BONANZA TRADING COMPANY PRIVATE LIMITED	P	30,726	649.9
7-Aug-14	BNK Cap Markets	UNICON MANAGEMENT PRIVATE LIMITED	S	270,875	26.0
7-Aug-14	BNK Cap Markets	RESPONCE SECURITIES PVT LTD	P	254,170	26.0
7-Aug-14	Keltech Ener	SOLAR INDUSTRIES INDIA LIMITED	S	11,047	400.0
7-Aug-14	Keltech Ener	WALLFORT FINANCIAL SERVICES LTD	P	10,000	400.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500335	Birla Corp	08-Aug-14	Dividend - Rs.6.00	-
530001	Gujarat Alk	08-Aug-14	Dividend - Rs.4.00	-
517300	Gujarat Inds	08-Aug-14	Dividend - Rs.2.50	-
500182	Hero MotoCorp	08-Aug-14	Interim Dividend - Rs.30.00	11-Aug-14
590130	Kanco Tea	08-Aug-14	Dividend - Rs.5.00	-
500336	Surya Roshni	08-Aug-14	Dividend - Rs.1.00	-
500770	Tata Chemicals	08-Aug-14	Dividend - Rs.10.00	-
500575	Voltas	08-Aug-14	Special Dividend - Rs.0.25	-
500575	Voltas	08-Aug-14	Special Dividend - Rs.0.25	-
500575	Voltas	08-Aug-14	Dividend - Rs.1.60	-
500575	Voltas	08-Aug-14	Dividend - Rs.1.60	-
531471	Duke Offshore	11-Aug-14	Interim Dividend - Rs.0.25	12-Aug-14
524818	Dynamic Inds-\$	11-Aug-14	Dividend - Rs.1.00	-
532622	Gateway Distr	11-Aug-14	Interim Dividend - Rs.4.00	12-Aug-14
534532	LYPSA GEMS	11-Aug-14	Dividend - Rs.0.50	-
505355	NESCO	11-Aug-14	Dividend - Rs.5.00	-
517506	TTK Prestige	11-Aug-14	Dividend - Rs.20.00	-
533271	Ashoka Buildcon	12-Aug-14	Final Dividend - Rs.0.80	-
500104	HPCL	12-Aug-14		-
533177	IL&FS TRANS	12-Aug-14	Dividend - Rs.4.00	-
524820	Panama Petro	12-Aug-14	Dividend - Rs.6.00	-
526381	Patel Integ-\$	12-Aug-14	Dividend - Rs.0.50	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
04-Aug-14	GBP	Construction PMI		62	62.6
04-Aug-14	EUR	PPI (YoY)		-1.00%	-1.00%
04-Aug-14	USD	ISM - NY Business Conditions			635.3
05-Aug-14	CNY	Chinese HSBC Services PMI			53.1
05-Aug-14	EUR	Services PMI		54.4	54.4
05-Aug-14	GBP	Services PMI		58	57.7
05-Aug-14	EUR	Retail Sales (MoM)		0.20%	
05-Aug-14	USD	Services PMI			61
05-Aug-14	USD	Factory Orders (MoM)		0.50%	-0.50%
05-Aug-14	USD	ISM Non-Manufacturing Employment			54.4
05-Aug-14	USD	ISM Non-Manufacturing PMI		56.1	56
06-Aug-14	GBP	Industrial Production (MoM)		0.60%	-0.70%
06-Aug-14	GBP	Manufacturing Production (MoM)		0.70%	-1.30%
06-Aug-14	USD	MBA 30-Year Mortgage Rate			4.33%
06-Aug-14	USD	Trade Balance		-43.50B	-44.40B
07-Aug-14	GBP	BoE QE Total			375B
07-Aug-14	GBP	Interest Rate Decision		0.50%	0.50%
07-Aug-14	EUR	Interest Rate Decision		0.15%	0.15%
08-Aug-14	USD	Consumer Credit		18.45B	19.60B
08-Aug-14	JPY	Current Account n.s.a.		-0.324T	0.523T
08-Aug-14	CNY	Chinese Trade Balance			31.60B
08-Aug-14	GBP	Trade Balance		-8.88B	-9.20B
08-Aug-14	USD	Nonfarm Productivity (QoQ)		0.20%	-3.20%
08-Aug-14	CNY	Chinese CPI (YoY)			2.30%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
05-Aug-14	INR	Indian HSBC Services PMI			54.4
05-Aug-14	INR	Indian Interest Rate Decision		8.00%	8.00%
06-Aug-14	INR	Indian M3 Money Supply			12.80%
08-Aug-14	INR	Indian Bank Loan Growth			13.70%

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