

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7627	(0.39)	CNX IT	9436	2.19
Sensex	25474	(0.43)	BANK NIFTY	15451	0.15
DowJones	16844	(0.60)	S&P CNX 500	6153	(0.64)
Nasdaq	4332	(0.14)	CNX FMCG	17873	(0.97)
Hangseng	23150	(0.46)	CNX REALTY	3901	(0.11)
Shanghai	2049	(0.27)	CNX AUTO	6807	(0.42)
Nikkei	14953	(0.77)	CNX ENERGY	10290	(2.08)
Strait Times	3290	0.00	CNX PHARMA	7903	0.88
Kospi	2010	(0.24)	Advances / Declines	BSE	NSE
Taiwan	9203	(0.29)	Advances	1647	666
FTSE	6839	(0.50)	Declines	1487	894
CAC	4555	(0.87)	Unchanged	72	33
DAX	9950	(0.79)	Total	3206	1593

Nifty Gainers		
Company	Price(Rs)	Chg(%)
INFY	3177.00	3.31
KOTAKBANK	923.25	2.57
TCS	2204.20	2.13
HEROMOTOCO	2705.00	1.47
DRREDDY	2426.75	1.30

Nifty Losers		
Company	Price(Rs)	Chg(%)
DLF	220.70	(5.38)
TATAPOWER	106.50	(5.38)
HINDALCO	162.15	(4.48)
COALINDIA	402.80	(4.19)
NTPC	157.10	(3.94)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Media Matrix	164.93	17.0	10
Britannia Inds	1.72	0.3	7
State Bank Mysre	2.17	0.3	6
Ambika Cotton	1.44	0.2	6
Ahluwalia Contr	5.09	0.9	6

Indian Forex	Closing	Chg	% Chg
USD/INR	59.325	0.060	0.10
GBP/INR	99.417	(0.213)	(0.21)
EUR/INR	80.320	(0.273)	(0.34)
JPY/INR	57.990	0.040	0.07

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26700	0
Silver (Rs/1kg)	40700	355

Commodities	Price	% Chg.
Crude (US\$/BBL)	104.6	0.22
Brent (US\$/BBL)	110.4	0.63
Gold (US/oz)	1260.8	(0.13)
Silver (US\$/oz)	19.2	(0.31)
Copper (US\$/MT)	6689.5	(0.09)
Alum (US\$/MT)	1835.5	(1.58)
Zinc(US\$/MT)	2102.5	(0.19)

ADR	Cl. Values	% Chg.
ICICI Bank	51.92	(0.03)
HDFC Bank	47.47	0.20
Infosys	54.76	2.46
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	40.92	0.56
Wipro	11.54	0.16
Tata Motors	39.28	(0.37)

Market Sensor

US market declined on Wednesday, with benchmark indexes retreating from all-time highs, after the World Bank lowered its outlook for global growth. Dow Jones Industrial Average was down 0.60% or 102.04 points at 16843.88. Nasdaq Composite was down 0.14% or 6.06 points at 4331.93. Standard & Poor's 500 was down 0.35% or 6.90 points at 1943.89.

Indian Equity market witnessed a weak trading session the previous day on concern of delayed monsoon and weak global cues. Nifty ended the previous trading session with a decline of 0.39% or 29.55 points at 7626.85. On Wednesday's trading session, FII's bought net Rs.313.4 Cr in cash market and bought net Rs.368.21 in derivative segment. Whereas, DII sold net Rs.407.76 Cr in cash segment.

Coming to today's trade Nifty to remain volatile with crucial intraday support exists at 7600 followed by 7550 while resistance is seen at 7680 followed by 7720.

Global News

❖ China announced new steps aimed at bolstering slowing economic growth by cutting taxes, spending more on developing the Yangtze River region and expanding financing for exporters. (Bloomberg)

❖ South Korea's central bank left its key rate unchanged, supporting growth that faces headwinds from sluggish investment and a won near a six-year high. (Bloomberg)

❖ Bank of Japan officials are considering maintaining a large balance sheet for the central bank even after it achieves its inflation target, reducing the risk of a surge in long-term bond yields, according to people familiar with the discussions. (Bloomberg)

❖ Federal Reserve officials, concerned that selling bonds from their \$4.3 trillion portfolio could crush the U.S. recovery, are preparing to keep their balance sheet close to record levels for years. (Bloomberg)

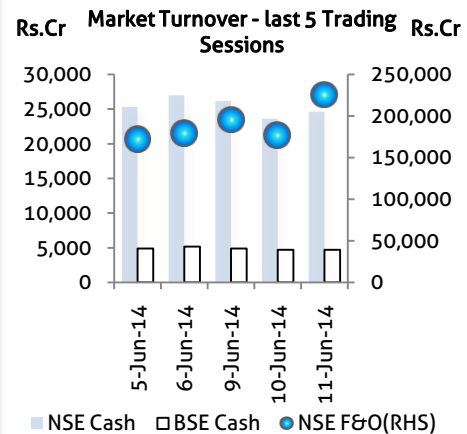
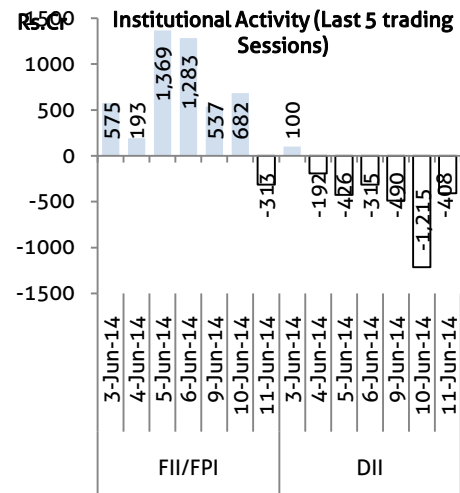
❖ The U.S. posted a \$130 billion budget deficit in May and the smallest shortfall for the first eight months of a fiscal year since 2008, as a stronger economy and rising employment bolster revenue. (Bloomberg)

Economic News

- ❖ To bolster economic growth, India should continue to gradually bring down the fiscal deficit and usher in fuel subsidy reforms, a senior International Monetary Fund official said. (BS)
- ❖ The commissioning of state-run North Eastern Electric Power Corporation's second biggest thermal power project in northeast India has been delayed on account of non-supply of gas by ONGC, resulting in a loss of Rs.5 crore a month, a top company official said Wednesday. (BS)
- ❖ The government is considering halting the export of wheat from its stockpiles this year in the wake of weak global prices and to keep the grain for meeting domestic demand in the event of a drought. (BS)
- ❖ Refuting allegations by steel makers of a shortage in domestic iron ore supply, miners body FIMI has said a paucity in some regions is not because of the inability to produce more but due to a faulty policy of Odisha state. (BS)
- ❖ Government has cashed in 228 million euros (\$310 million) in bank guarantees from the scrapped helicopter deal with Finmeccanica, people familiar with the matter said. (BS)
- ❖ Rubber industry dominated by around 6000 micro, small and medium sized manufacturing units in different clusters across the country is pinning hopes on correction of inverted duty structure in the next Union Budget. (BS)
- ❖ As the dates for Prime Minister Narendra Modi's visit to Japan are firming up – he will travel to Tokyo in July - on top of Japan's business agenda is to press for a change in India's civil nuclear liability law that will enable a partnership between India and Japan in this area, to move forward. (BS)
- ❖ The Ministry of Agriculture has called an urgent meeting of 18 states in the wake of delayed rains next week and prepare state specific contingency plan for crops. (BS)
- ❖ Exports grew by a six-month high of 12.40% at \$27.9 billion in May this year against \$24.91 billion in the same year ago. (BS)
- ❖ Giving an early glimpse into the Telangana government's new initiatives on the industrial development front, governor E S L Narashimhan on Wednesday announced the setting up of a Pharma City for further expansion of the pharmaceutical industry in this region. (BS)
- ❖ Demanding the rollback of the Four Year Undergraduate Programme (FYUP), NSUI members staged a protest in front of HRD Minister Smriti Irani's residence. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3541	0.0009	0.07
GBP-USD	1.6798	0.0010	0.06
USD-JPY	102.08	0.01	0.01

Bond Markets	Closing	Chg
10-yr bond	8.60	1.10 bps
Interbank call	7.85	7.98 bps

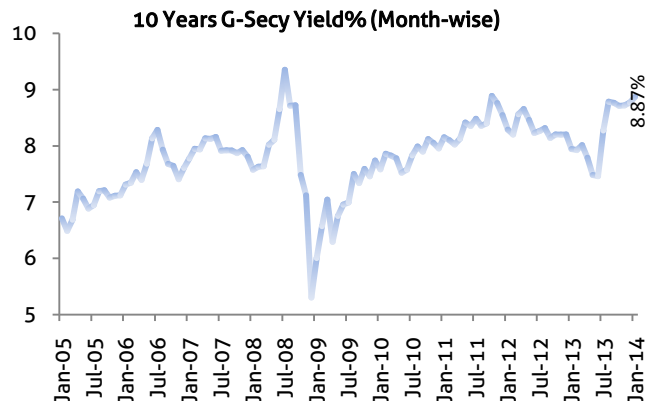
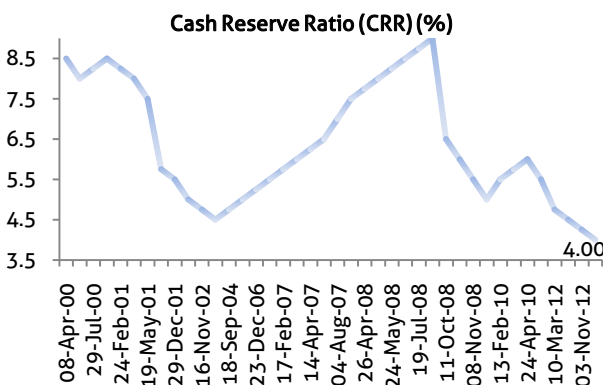
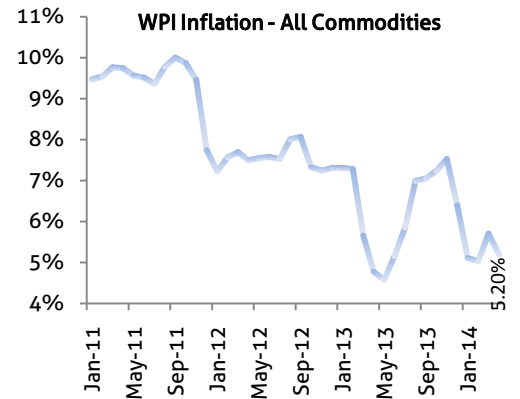
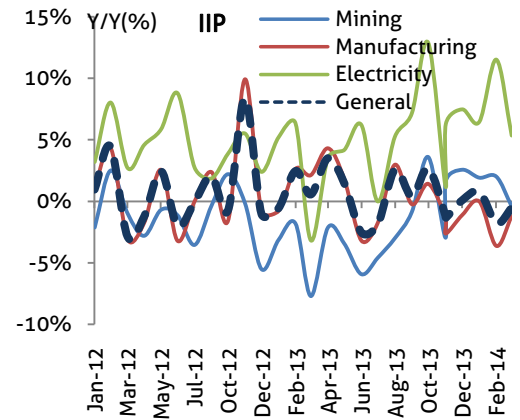
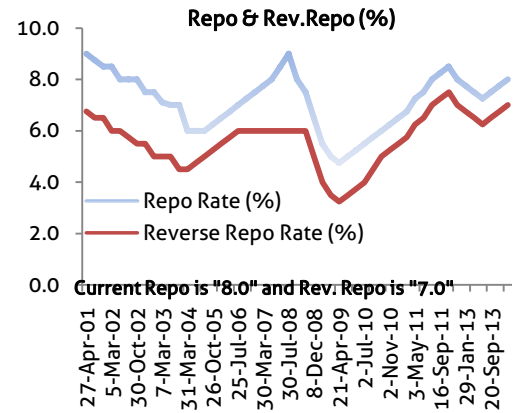


Domestic News

- ❖ The meeting of inter-ministerial group (IMG) on coal blocks to look into the issue of bank guarantees related to 61 mines allotted to firms such as ArcelorMittal, Tata Steel and JSPL which was to be held has been postponed to next week. (BS)
- ❖ State Bank of India has partnered with payments service provider, Ezetap Mobile Solutions, to deploy mobile point-of-sale (mPOS) solution. (BS)
- ❖ VE Commercial Vehicles (VECV), a 50:50 joint venture between Sweden's Volvo Group and home grown Eicher Motors, will be introducing more than dozen products under PRO series in the light, medium and heavy duty vehicles. (BS)

Domestic News (Cont...)

- ❖ KGS Aranmula International Airport Limited [KAIAL] will appeal in the Supreme Court against the verdict of the National Green Tribunal [NGT], said Gigi George, managing director. (BS)
- ❖ Rajasthan-based Rays Power Infra (P) Limited (RPIL) on Wednesday announced commissioning of 10 Mw solar powerplant at Midjil in Mahabubnagar district of Andhra Pradesh. (BS)
- ❖ The Kishore Biyani-led Future Retail said it will raise Rs 2,000 crore by issuing shares to promoters and investors. About 75% of the funds raised will be used to reduce debt, the company said. (BS)
- ❖ The Sahara group has made a partial payment of Rs 3,000 crore after the Supreme Court lifted a freeze on its assets. (BS)
- ❖ Telecom operator Reliance Communications has extended 3G services to 18 more circles across the country. (BS)
- ❖ Prime Minister's Office (PMO) is believed to have sought views of new Oil Minister Dharmendra Pradhan on appointment of B Ashok as the head of India's largest oil firm, IOC. (BS)
- ❖ The Intellectual Property Appellate Board (IPAB) set aside orders against Colgate-Palmolive and Ericsson in their respective patent cases. (BS)
- ❖ The domestic aviation space is all set to witness severe competition with the entry of AirAsia India, which starts operation from tomorrow. (BS)
- ❖ The National Green Tribunal (NGT) issued notice to Central Ground Water Authority (CGWA) on a plea of soft drink giant Coca-Cola seeking to quash and set aside the order for closure of its Varanasi unit by Uttar Pradesh Pollution Control Board (UPPCB). (BS)
- ❖ ACC Ltd, owned by Swiss cement giant Holcim, has appointed Harish Badami as its new CEO & MD. Badami would be replacing Kuldip Kaura whose term was extended till 31 December, 2014. (BS)
- ❖ US defence major and integrated technology company Honeywell said it is positive on the defence outlook in India especially in the context of the recent government announcement to allow 100% foreign direct investment (FDI) in defence in the country. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
11-Jun-14	Alok Industries Limited	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	14708388	15.6
11-Jun-14	Housing Development and I	NOMURA SINGAPORE LIMITED	SELL	2098000	106.0
11-Jun-14	Housing Development and I	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	SELL	2119582	104.6
11-Jun-14	MBL Infrastructures Ltd	PAYAL COMMERCIAL COMPANY LTD	SELL	97717	253.8
11-Jun-14	D-Link India Ltd	KAMALAKSHA RAMA NAIK	SELL	161344	54.3

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
11-Jun-14	STRIDES ARCO	GOLDMAN SACHS INVESTMENTS MAURITIUS I LIMITED	B	300,000	626.3
11-Jun-14	Media Matrix	TRIPURARI PROPERTIES PRIVATE LIMITED	S	16,132,941	3.4
11-Jun-14	STAMPEDE	DIKSON TRADING & FINANCE COMPANY LIMITED	B	132,000	129.1
11-Jun-14	ACE Edutrend	SHILPI MITTAL	S	337,663	32.1
11-Jun-14	Max Alert Sys	SUKUSAMA TRADING & INVESTMENTS PVT LTD	B	46,800	164.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532215	Axis Bank	12-Jun-14	Dividend - Rs.20.00	-
532134	BOB	12-Jun-14	Final Dividend - Rs.10.50	-
517326	CMC	12-Jun-14	Dividend - Rs.22.50	-
532504	NAVIN FLUORI-\$	12-Jun-14	Final Dividend - Rs.8.50	-
533295	Punjab & Sind Bank	12-Jun-14	Final Dividend - Rs.0.60	-
532735	R Systems	12-Jun-14	Interim Dividend - Rs.0.95	13-Jun-14
532779	Torrent Power	12-Jun-14	Dividend - Rs.0.50	-
532179	Corporation Bank	13-Jun-14	Final Dividend - Rs.2.25	-
500355	Rallis India	13-Jun-14	Final Dividend - Rs.1.40	-
500820	Asian Paints	16-Jun-14	Final Dividend - Rs.4.20	-
500089	DIC India	16-Jun-14	Dividend - Rs.4.00	-
526560	EICL-\$	16-Jun-14	Dividend - Rs.0.30	-
532187	Indusind Bank	16-Jun-14	Dividend - Rs.3.50	-
524558	Neuland Lab	16-Jun-14	Dividend - Rs.1.50	-
524558	Neuland Lab	16-Jun-14	Special Dividend - Rs.1.50	-
500420	Torrent Pharma	16-Jun-14	Final Dividend - Rs.5.00	-
500084	CESC	18-Jun-14	Dividend - Rs.8.00	-
521030	NAKODA-\$	18-Jun-14	Final Dividend - Rs.0.30	-
532121	Dena Bank	19-Jun-14	Final Dividend - Rs.1.10	-
530959	Diana Tea	19-Jun-14	Dividend - Rs.0.25	-
532388	IOB	19-Jun-14	Final Dividend - Rs.0.50	-
506113	Lifeline Drugs	19-Jun-14	Interim Dividend - Rs.0.10	20-Jun-14

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
09-Jun-14	JPY	Current Account n.s.a.		0.323T	0.116T
09-Jun-14	JPY	GDP (YoY)		5.60%	5.90%
09-Jun-14	EUR	Sentix Investor Confidence		13.2	12.8
10-Jun-14	CNY	Chinese CPI (YoY)		2.40%	1.80%
10-Jun-14	GBP	Industrial Production (YoY)		2.80%	2.30%
10-Jun-14	GBP	Manufacturing Production (YoY)		4.00%	3.30%
10-Jun-14	USD	NFIB Small Business Optimism			95.2
11-Jun-14	JPY	CGPI (YoY)		4.10%	4.10%
11-Jun-14	GBP	Claimant Count Change		-25.0K	-25.1K
11-Jun-14	GBP	Unemployment Rate		6.70%	6.80%
11-Jun-14	USD	MBA 30-Year Mortgage Rate			4.26%
11-Jun-14	USD	Federal Budget Balance		-147.5B	106.9B
12-Jun-14	GBP	RICS House Price Balance		52%	54%
12-Jun-14	EUR	Industrial Production (MoM)		0.40%	-0.30%
12-Jun-14	USD	Import Price Index (MoM)		0.20%	-0.40%
12-Jun-14	USD	Retail Sales (MoM)		0.60%	0.10%
12-Jun-14	USD	Business Inventories (MoM)		0.40%	0.40%
12-Jun-14	USD	Initial Jobless Claim			
13-Jun-14	JPY	Industrial Production (MoM)			-2.50%
13-Jun-14	CNY	Chinese Fixed Asset Investment (YoY)		17.10%	17.30%
13-Jun-14	CNY	Chinese Industrial Production (YoY)		8.80%	8.70%
13-Jun-14	EUR	Employment Change (YoY)			-0.50%
13-Jun-14	USD	PPI (MoM)		0.10%	0.60%
13-Jun-14	USD	Michigan Consumer Sentiment		83	81.9

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
11-Jun-14	INR	Indian M3 Money Supply			
12-Jun-14	INR	Indian CPI (YoY)			8.59%
12-Jun-14	INR	Indian Industrial Production (YoY)			-0.50%
12-Jun-14	INR	Indian Manufacturing Output (MoM)			-1.20%
13-Jun-14	INR	Indian Bank Loan Growth			13.60%

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