

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8349	(1.33)	CNX IT	12007	2.52
Sensex	27512	(1.27)	BANK NIFTY	18060	(2.99)
DowJones	17403	0.01	S&P CNX 500	6986	(1.61)
Nasdaq	5044	0.15	CNX FMCG	20330	(1.61)
Hangseng	23971	0.23	CNX REALTY	3313	(3.27)
Shanghai	3915	0.73	CNX AUTO	8407	(2.46)
Nikkei	20479	0.42	CNX ENERGY	8276	(2.35)
Strait Times	3093	1.03	CNX PHARMA	3763	(1.15)
Kospi	1984	0.42	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8296	0.15	Advances	691	233
FTSE	6571	(1.40)	Declines	2148	1286
CAC	4925	(3.40)	Unchanged	122	142
DAX	10925	(3.27)	Total	2961	1661

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HCLTECH	972.00	3.36
TECHM	558.55	3.31
SUNPHARMA	867.10	3.01
INFY	1141.00	2.87
TCS	2670.00	2.53

Nifty Losers		
Company	Price(Rs)	Chg(%)
HINDALCO	95.90	(7.12)
VEDL	114.80	(7.08)
BPCL	868.00	(6.19)
COALINDIA	372.60	(5.12)
CAIRN	154.20	(5.05)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
JUBLINDS	2.88	0.1	36
ORIENTCQ	5.64	0.2	35
HCLTECH	20.36	0.8	26
MANPASAND	3.66	0.2	15
PETRONET	7.61	0.7	10

Indian Forex	Closing	Chg	% Chg
USD/INR	64.827	0.654	1.02
GBP/INR	101.001	1.153	1.16
EUR/INR	71.822	1.462	2.08
JPY/INR	51.910	0.540	1.05

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	25542	398
Silver (Rs/1kg)	35500	305

Commodities	Price	% Chg.
Crude (US\$/BBL)	43.3	0.65
Brent (US\$/BBL)	49.8	1.88
Gold (US/oz)	1120.5	0.91
Silver (US\$/oz)	15.4	1.12
Copper (US\$/MT)	5103.0	(0.72)
Alum (US\$/MT)	1547.0	0.00
Zinc(US\$/MT)	1809.0	(1.26)

ADR	Cl. Values	% Chg.
ICICI Bank	9.78	(0.12)
HDFC Bank	63.04	0.74
Infosys	17.85	0.39
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	66.35	0.12
Wipro	12.65	0.35
Tata Motors	27.45	(1.01)

## Market Sensor

US market closed mostly higher on Wednesday, recovering from sharp intraday declines as gains in energy offset earlier pressures from growth concerns. Dow Jones Industrial Average almost remained unchanged at 17402.51. Nasdaq Composite was up 0.15% or 7.60 points at 5044.39. Standard & Poor's 500 was up 0.10% or 1.98 points at 2086.05.

Indian equity market ended the session on a lower note over the prevailing uncertainty over the key bills in parliament. China's currency devaluation news was visible across the globe including ours as participants now fear possibility of global currency war. Nifty ended the previous day with a decline of 1.33% or 112.90 at 8349.45. On Wednesday's trading session, FIIs sold Rs.1855.02 Cr in cash market and bought net Rs.402.85 in derivative segment. Whereas, DII bought net Rs.1223.8 Cr in cash segment.

## Global News

❖The European Union moved to keep Greece on a tight rein after its latest bailout, with sources saying the 85 billion euro deal will be reviewed by lenders in October and any discussion of debt relief will only come at a later stage. (Reuters)

❖The United States posted a budget deficit of \$149.2 billion in July, up 58 percent from the same period last year, the U.S. Treasury Department said on Wednesday. (Reuters)

❖Greek banks will have restricted access to bailout funds until a fresh injection of equity to recapitalize them several months from now is approved, sources told Reuters on Wednesday. (Reuters)

❖Germany's Finance Ministry on Wednesday dismissed a study saying Berlin saved billions of euros through low borrowing costs due to Europe's debt crisis and said the current low interest rate environment "not ideal". (Reuters)

❖China's currency fell to a four-year low on Wednesday, slumping for a second day, after a central bank devaluation on Tuesday, and government sources believe the yuan may be allowed to slide even further to help the country's exporters. (Reuters)

❖China's move to devalue its currency reflects a growing clamour within government circles for a weaker yuan to help struggling exporters, ensuring the central bank remains under pressure to drag it down further in the months ahead, sources said. (Reuters)

## Economic News

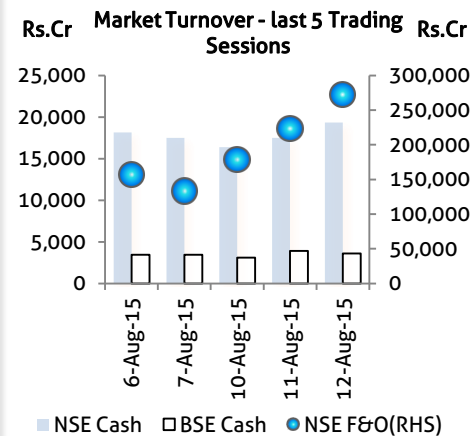
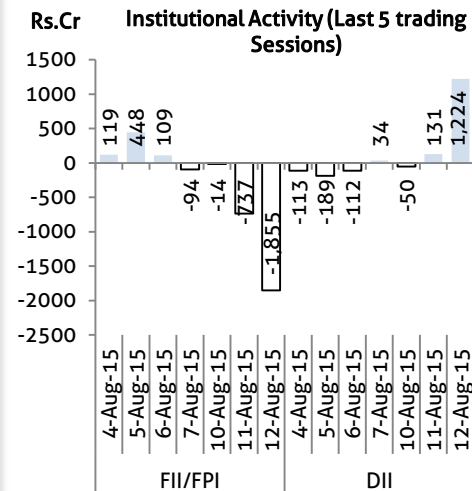
- ❖ The government has approved India BPO Promotion Scheme (IBPS) for promoting of BPO/ITeS operations across the country with an outlay of about Rs 493 crore during the remaining period of 12th Five Year Plan, Parliament was informed. (BS)
- ❖ India and the US will hold first-ever high-level strategic and commercial dialogue next month in Washington focusing on areas such as ease of doing business and smart cities with an aim to boost investment and raise bilateral trade five-fold to \$500 billion annually. (BS)
- ❖ A steady 37 per cent growth in indirect tax collections since the beginning of the fiscal year 2015-16 reflects that the underlying momentum in the economy is improving, Chief Economic Advisor Arvind Subramanian said on Wednesday. (BS)
- ❖ Terming GST as one of the most promising reforms on anvil, global giant HSBC said the bill has been "watered down" but can still add a "sizeable" 60 basis points to India's GDP growth rate. (BS)
- ❖ World economies, including India, will have to take note of Chinese currency devaluation designed to avert slowdown in its economy and exports, Chief Economic Advisor Arvind Subramanian said. (BS)
- ❖ India's order of 36 French-made Rafale fighter jets has run into trouble with government officials struggling to agree on sales terms, sources said, four months after Prime Minister Narendra Modi intervened to break a logjam in previous commercial negotiations. (BS)
- ❖ The union ministry of road transport and highways is considering the creation of a separate transport department, Secretary Vijay Chhibber said. (BS)
- ❖ The government will increase the import duty on some base metals by 2.5%, according to a list of business on the website of the upper house of parliament on Wednesday. (BS)
- ❖ The Finance Ministry said a steady 37 per cent growth in indirect tax collections in four months to July reflects that underlying momentum in the economy is improving. (BS)
- ❖ High VAT (value added tax) rate on mobile phones and the lack of a dedicated state policy on ESDM (electronics system design and manufacturing) sector is turning away investors from Odisha, feels the Indian Cellular Association (ICA). (BS)
- ❖ The government expects the Reserve Bank of India (RBI) to cut interest rates further in the coming years in view of the falling of both fiscal deficit and inflationary pressures, parliament was told on Wednesday. (BS)
- ❖ In what should cheer stakeholders, India's retail inflation fell to 3.78% in July from 5.40% in the month before, even as the growth in factory output accelerated to 3.8% in June from 2.7% in the previous month, official data showed on Wednesday. (BS)

## Domestic News

- ❖ Country's largest domestic ship liner Great Eastern Shipping Company reported a 45 per cent jump in its consolidated net profit to Rs 323.67 crore for the quarter ended June 30, on the back of higher income. (BS)
- ❖ Norway's telecom major Telenor's Indian unit Uninor has a three-year worth Rs 1,200 crore to Chinese firm Huawei for modernising and managing its network across six circles in the country. (BS)

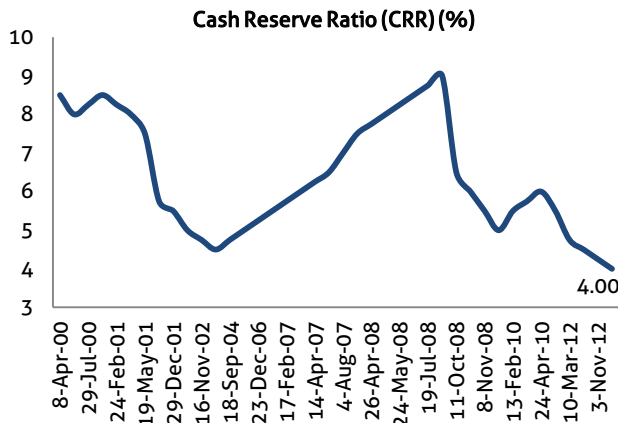
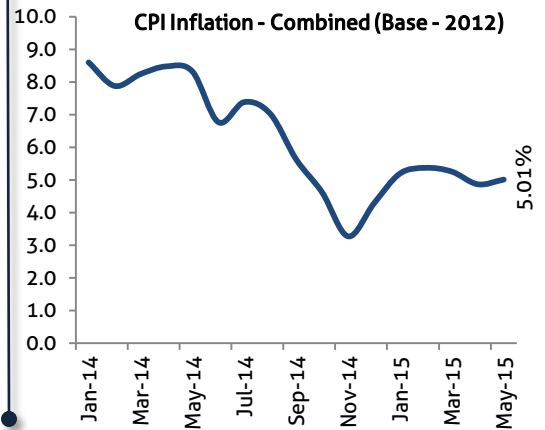
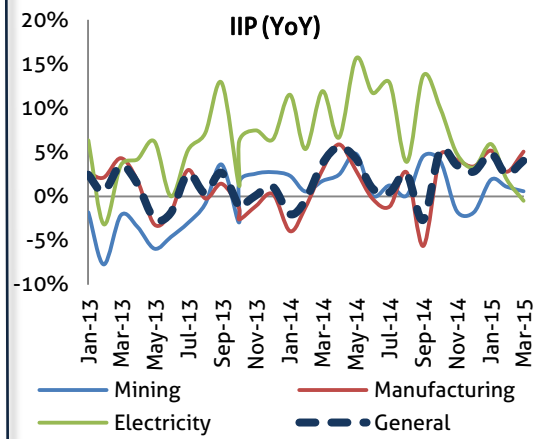
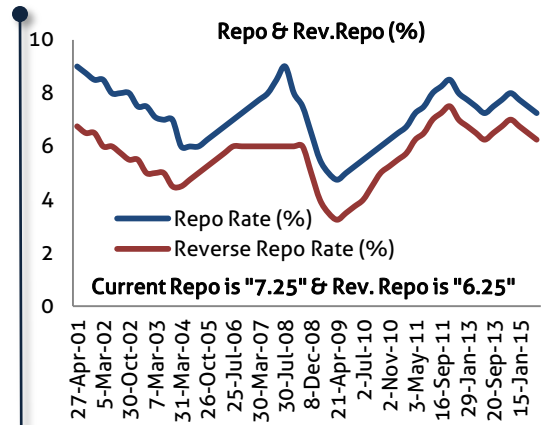
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1148	(0.0011)	(0.10)
GBP-USD	1.5624	0.0009	0.06
USD-JPY	124.39	0.1800	0.14

Bond Markets	Closing	Chg
10-yr bond	7.93	-1.10 bps
Interbank call	7.11	1.61 bps



## Domestic News (Cont...)

- ❖ Karnataka has created a Taiwan electronic manufacturing cluster near the Bengaluru airport to house Taiwanese electronic manufacturers and expects them to invest \$ 500 million in setting up the units. (BS)
- ❖ The Comptroller and Auditor General (CAG) has pulled up state-run Steel Authority of India (SAIL) for delaying the modernisation and expansion plans (MEP) of its integrated steel plants for more than four years. (BS)
- ❖ Public sector lender IDBI Bank's net profit for the first quarter ended June 2015 rose by 27% at Rs 135 crore on substantial rise in net interest income (NII). (BS)
- ❖ Commercial vehicle manufacturer Ashok Leyland has posted a net profit of Rs 159.32 crore during the quarter ended June 30, 2015, as compared to net loss of Rs 47.95 crore for the same period of last year. (BS)
- ❖ Cement manufacturer India Cements Ltd posted Rs 40.10 crore net profits for first quarter of the current fiscal ended June 30, 2015. (BS)
- ❖ Nestle India claims that the United States Food & Drug Administration (US FDA) has cleared flagship instant noodles, which was under scanner since the controversy started in India regarding an alleged contamination of lead in it. (BS)
- ❖ Kumbakonam-based City Union Bank Ltd (CUB) has posted 12.13 per cent growth in net profit at Rs 111.56 crore during the quarter ended June 30, 2015, as compared to the net profit of Rs 99.49 crore registered during the same quarter of previous fiscal year. (BS)
- ❖ Realty major DLF has raised Rs 1,000 crore through issuance of non-convertible debentures as part of its strategy to boost internal cash flows. (BS)
- ❖ Drug firm Claris Lifesciences said it has received prior approval supplement (PAS) for Furosemide injection which will help it to resume supply in the US market. (BS)
- ❖ Adani's new container terminal at Ennore is expected to go on stream by March 2016, almost 10 months before schedule. (BS)
- ❖ Boeing co estimates Indian carriers will need 1,740 new airplanes, valued at \$240 billion, through 2034, a senior executive at the US planemaker said on Wednesday. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
12-Aug-15	Garware Wall Ropes Ltd.	ACACIA PARTNERS L.P	SELL	213000	317.1
12-Aug-15	Subex Limited	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	2665174	16.9
12-Aug-15	Reliance Indl Infra Ltd	F6 FINSERVE PRIVATE LIMITED	BUY	83565	375.0
12-Aug-15	Aksh Optifibre Limited	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	1117445	20.3
12-Aug-15	TVS Electronics Limited	BP FINTRADE PRIVATE LIMITED	SELL	153701	115.5

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
12-Aug-15	ORIENTCQ	HDFCFACMIPLONGTERMPPLAN	B	275,000	525.0
12-Aug-15	KRIINFRA	MERRILL LYNCH CAPITAL MARKETS ESPANA SA SV	B	400,000	83.0
12-Aug-15	SELMCL	RKR INVESTMENTS SERVICES	S	2,500,000	4.6
12-Aug-15	SAMBHAAV	GAUTAMBHAI M PATEL	S	1,525,000	4.1
12-Aug-15	BHANDHOS	PEP INVESTMENT	S	90,329	58.3

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
533758	APLAPOLLO	13-Aug-15	Dividend - Rs. - 6.0000	-
532454	BHARTIARTL	13-Aug-15	Final Dividend - Rs. - 2.2200	-
526881	FINANTECH	13-Aug-15	Interim Dividend - Rs. - 5.0000	14-Aug-15
523672	FLEXFO	13-Aug-15	Dividend - Rs. - 2.2500	-
505710	GRAUWEIL	13-Aug-15	Dividend - Rs. - 0.2200	-
532129	HEXAWARE	13-Aug-15	Interim Dividend - Rs. - 2.0000	14-Aug-15
532209	J&KBANK	13-Aug-15	Dividend - Rs. - 2.1000	-
532054	KDDL	13-Aug-15	Dividend - Rs. - 2.0000	-
523792	MAZDALTD	13-Aug-15	Dividend - Rs. - 6.0000	-
520059	MUNJALAU	13-Aug-15	Dividend - Rs. - 2.5000	-
511766	MUTHFTN	13-Aug-15	Dividend - Rs. - 5.0000	-
534425	SPECIALITY	13-Aug-15	Dividend - Rs. - 1.0000	-
580001	STAN	13-Aug-15	Interim Dividend - Rs. -	14-Aug-15
526586	WIMPLAST	13-Aug-15	Final Dividend - Rs. - 10.0000	-
523716	ASHIANA	14-Aug-15	Dividend - Rs. - 0.5000	-
519105	AVTNPL	14-Aug-15	Final Dividend - Rs. - 0.3000	-
532210	CUB	14-Aug-15	Dividend - Rs. - 1.1000	-
530825	DAIKAFFI	14-Aug-15	Dividend - Rs. - 0.8000	-
532178	ENGINERSIN	14-Aug-15	Final Dividend - Rs. - 2.0000	-
517300	GIPCL	14-Aug-15	Dividend - Rs. - 2.5000	-
538979	GRNLAMIND	14-Aug-15	Final Dividend - Rs. - 0.5000	-
534641	IDFCFTPS1D	14-Aug-15	Redemption of Mutual Fund	17-Aug-15

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
10-Aug-15	JPY	Current Account n.s.a. (Jun)		0.774T	1.881T
10-Aug-15	JPY	Household Confidence (Jul)			41.7
11-Aug-15	GBP	BRC Retail Sales Monitor (YoY) (Jul)			1.80%
11-Aug-15	USD	NFIB Small Business Optimism (Jul)			94.1
11-Aug-15	USD	Nonfarm Productivity (QoQ) (Q2)		1.00%	-3.10%
11-Aug-15	USD	Wholesale Inventories (MoM) (Jun)		0.30%	0.80%
12-Aug-15	JPY	Industrial Production (MoM) (Jun)			0.80%
12-Aug-15	CNY	Industrial Production (YoY) (Jul)		6.60%	6.80%
12-Aug-15	GBP	Claimant Count Change (Jul)			7.0K
12-Aug-15	GBP	Unemployment Rate (Jun)			5.60%
12-Aug-15	EUR	Industrial Production (YoY) (Jun)			1.60%
12-Aug-15	USD	MBA 30-Year Mortgage Rate			
12-Aug-15	USD	Federal Budget Balance (Jul)		-103.0B	51.8B
13-Aug-15	GBP	RICS House Price Balance (Jul)			40%
13-Aug-15	USD	Import Price Index (MoM) (Jul)		-0.80%	-0.10%
13-Aug-15	USD	Retail Sales (MoM) (Jul)		0.40%	-0.30%
13-Aug-15	USD	Initial jobless claims			40.3
13-Aug-15	USD	Business Inventories (MoM) (Jun)		0.30%	0.30%
14-Aug-15	EUR	CPI (YoY) (Jul)		0.20%	0.20%
14-Aug-15	EUR	GDP (YoY) (Q2)		1.30%	1.00%
14-Aug-15	USD	PPI (YoY) (Jul)			-0.70%
14-Aug-15	USD	Industrial Production (MoM) (Jul)		0.30%	0.20%
14-Aug-15	USD	Michigan Consumer Sentiment (Aug)		95	93.1

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
12-Aug-15	INR	CPI (YoY) (Jul)			5.40%
12-Aug-15	INR	Industrial Production (YoY) (Jun)			2.70%
14-Aug-15	INR	WPI Inflation (YoY) (Jul)			-2.40%

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