

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 5851 | (1.06) | CNX IT | 8270 | (1.23) |
| Sensex | 19782 | (1.08) | BANK NIFTY | 10159 | (2.03) |
| DowJones | 15301 | (0.17) | S&P CNX 500 | 4446 | (0.97) |
| Nasdaq | 3716 | (0.24) | CNX FMCG | 17506 | 0.74 |
| Hangseng | 22849 | (0.46) | CNX REALTY | 165 | 0.52 |
| Shanghai | 2246 | (0.44) | CNX AUTO | 4628 | (1.66) |
| Nikkei | 14327 | (0.42) | CNX ENERGY | 7707 | (1.02) |
| Strait Times | 3115 | (0.21) | CNX PHARMA | 7276 | 0.12 |
| Kospi | 1993 | (0.55) | Advances / Declines | BSE | NSE |
| Taiwan | 8165 | (0.74) | Advances | 1166 | 553 |
| FTSE | 6589 | 0.01 | Declines | 1189 | 625 |
| CAC | 4107 | (0.30) | Unchanged | 148 | 59 |
| DAX | 8494 | (0.02) | Total | 2503 | 1237 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| TATAPOWER | 76.45 | 3.80 |
| IDFC | 94.70 | 2.66 |
| ITC | 337.60 | 2.32 |
| GAIL | 309.50 | 2.03 |
| RANBAXY | 454.40 | 1.18 |

| Nifty Losers | | |
|--------------|-----------|---------|
| Company | Price(Rs) | Chg(%) |
| JPASSOCIAT | 38.20 | (11.98) |
| INDUSINDBK | 396.10 | (5.65) |
| TATASTEEL | 301.55 | (4.48) |
| BHEL | 134.90 | (4.12) |
| ONGC | 277.80 | (3.98) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|--------------------|-----------------|------------------|------------------|
| Westlife Dev | 100.44 | 0.08 | 1241.63 |
| Bharat Forge | 85.38 | 0.67 | 128.16 |
| Wyeth | 1.05 | 0.01 | 103.65 |
| Gujarat State Fert | 10.26 | 0.23 | 44.13 |
| JMT Auto | 7.07 | 0.34 | 20.55 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|---------|--------|
| USD/INR | 63.667 | (0.236) | (0.37) |
| GBP/INR | 100.709 | 0.240 | 0.24 |
| EUR/INR | 84.723 | 0.072 | 0.09 |
| JPY/INR | 64.100 | 0.420 | 0.66 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 30460 | 30 |
| Silver (Rs/1kg) | 51868 | (482) |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 108.6 | 0.87 |
| Brent (US\$/BBL) | 112.8 | 1.15 |
| Gold (US/oz) | 1326.6 | (2.58) |
| Silver (US\$/oz) | 22.0 | (4.64) |
| Copper (US\$/MT) | 7043.5 | (1.67) |
| Alum (US\$/MT) | 1747.0 | (0.54) |
| Zinc(US\$/MT) | 1824.5 | (0.73) |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 30.34 | (0.85) |
| HDFC Bank | 31.73 | (0.48) |
| Infosys | 48.31 | (0.55) |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 35.07 | (0.20) |
| Wipro | 9.85 | (0.30) |
| Tata Motors | 25.86 | (0.60) |

Market Sensor

U.S market closed near their lows Thursday after crawling along the flatline for most of the session in lackluster trading, as investors paused after the recent market run-up and ahead of the Federal Reserve's policy-setting meeting. Dow Jones Industrial Average was down 0.17% or 25.96 points at 15300.64. Nasdaq Composite was down 0.24% or 9.04 points at 3715.97. Standard & Poor's 500 was down 0.34% or 5.71 points at 1683.42.

Indian equity market ended sharply lower led by profit booking activity in the market. Nifty ended the previous trading session with a decline of 1.06% or 62.45 points at 5850.70. On Friday's trading session, FIIs bought net Rs.930.54 Cr in cash market and sold net Rs 1412.34 in derivative segment. Whereas, DII sold net Rs.395.49 Cr in cash segment.

Coming to today's trade Nifty to trade volatile, crucial resistance is seen at 5920 while support exist at 5775.

Global News

❖ The U.S. budget deficit narrowed in August from a year earlier as a stronger job market boosted revenue, propelling the world's largest economy toward its smallest annual shortfall since 2008. (Bloomberg)

❖ Confidence among American consumers stabilized last week after four straight declines even as their views of the economy deteriorated. (Bloomberg)

❖ Japan is considering a reduction in corporate income taxes as part of a stimulus package to cushion the economy from the planned increase in the sales levy, according to three people briefed on the matter. (Bloomberg)

❖ House Majority Leader Eric Cantor and other Republicans are shifting their strategy in talks on avoiding a U.S. government shutdown, seeking to delay instead of defund President Barack Obama's health-care law. (Bloomberg)

❖ Jobless claims in the U.S. declined last week to the lowest level since April 2006 as work on computer systems in two states caused those employment agencies to report fewer applications. (Bloomberg)

❖ Bank of England Governor Mark Carney said his flagship communications policy is supporting the U.K. economic recovery, as he answered lawmakers who suggested that it may be confusing the public and doubted by investors. (Bloomberg)

Economic News

❖ India's slowing economy and its massive current account and fiscal deficits are not structural problems and can be fixed with modest reforms, newly appointed central bank Governor Raghuram Rajan said on Wednesday. (BS)

❖The government will decide on raising the retail prices of diesel and cooking gas (LPG) in a few weeks, the oil secretary said on Thursday, in a bid to cut the biggest item in its import bill and support the local currency. (BS)

❖Reserve Bank has decided to create a central repository on large borrowers-- both individuals and entities with exposure of more than Rs 10 crore to help banks deal with credit risks. (BS)

❖Petrol prices may be cut by as much as Rs 1-1.50 per litre next week on falling international oil rates and appreciating rupee but a one-time hike in diesel and possibly LPG rates is still on the cards. (BS)

❖The world may face another economic crisis as several nations, both developing and developed nations, still have imbalances, noted economist Jayati Ghosh said. (BS)

❖The annual consumer price inflation eased marginally in August to 9.52% in line with expectations from 9.64 in July, government data showed on Thursday. (BS)

❖The Reserve Bank is likely to retain the marginal standing facility (MSF) at the elevated 10.25% in its mid-quarter policy due on September 20 unless the US Federal Reserve defers its plan to withdraw its easy money policy, according to a report. (BS)

❖It seems that Raghuram Rajan is the good omen the economy was waiting for. Even the IIP seems to have suddenly improved way beyond market expectations, though the reported figure is before Rajan assumed office. (BS)

❖The Ministry of Corporate Affairs (MCA) notified some key sections of the new Companies Act. MCA notified 98 sections of the new Act, it said in a press note. (BS)

❖A higher dose of diesel price increase and an increase in price of subsidised cooking gas is likely to happen after May 17 when petroleum Minister Veerappa Moily is scheduled to return from an official trip overseas. (BS)

Domestic News

❖The government approved the proposal of Rs 700 crore capital infusion in Export-Import Bank of India to support future growth of the lender. (BS)

❖Aurobindo Pharma said its board has approved to acquire Andhra Pradesh based Hyacinths Pharma, from its existing shareholders. (BS)

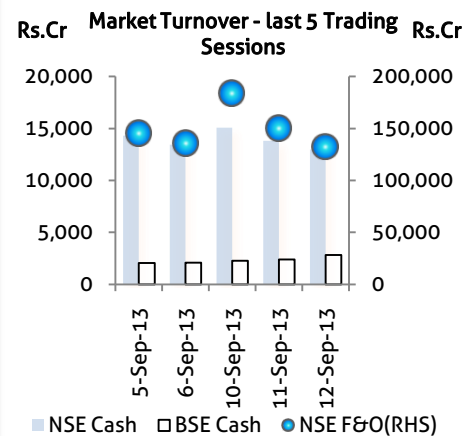
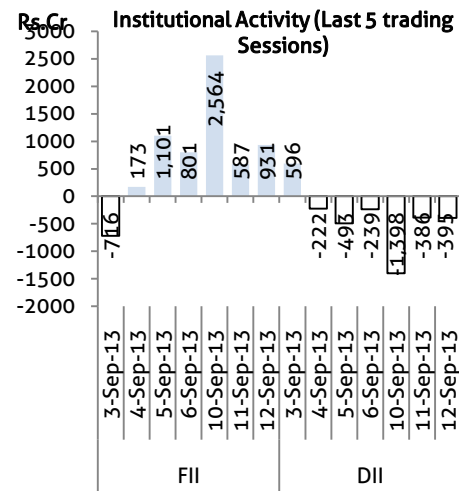
❖Standalone health insurance company Religare Health Insurance has tied up with public sector lender Union Bank of India for the latter to become its corporate agent. (BS)

❖Adani Ports & SEZ Ltd (APSEZ), part of Adani Group, on Thursday set a new record in coal handling in a day at its Mundra Port. The country's largest port developer handled 151,229 metric tonnes of steam coal in past 24 hours at the Mundra port. (BS)

❖A Group of Ministers (GoM) on revival of BSNL and MTNL decided to refund the money paid by the state-run players for surrendering BWA spectrum worth more than Rs 11,000 crore. (BS)

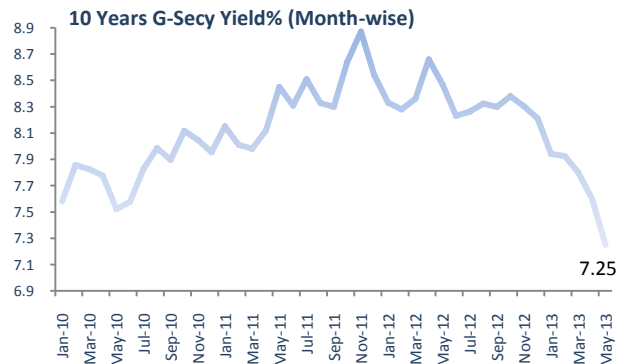
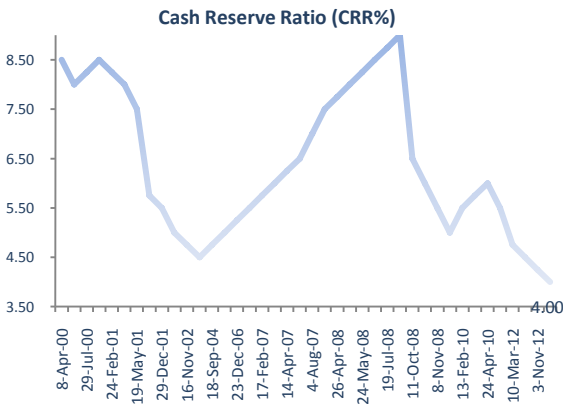
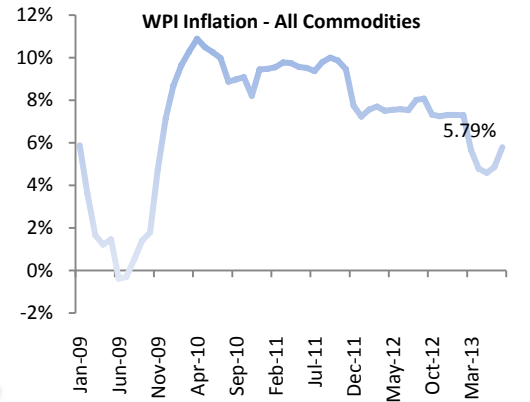
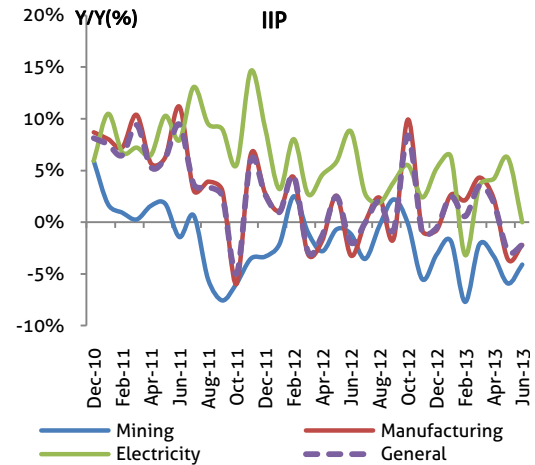
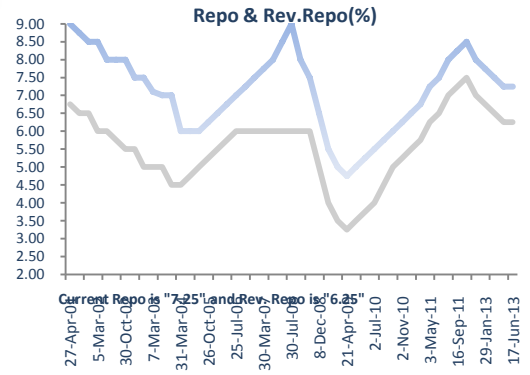
| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.3281 | (0.0018) | (0.14) |
| GBP-USD | 1.5793 | (0.0012) | (0.08) |
| USD-JPY | 99.73 | 0.19 | 0.19 |

| Bond Markets | Closing | Chg |
|----------------|---------|---------|
| 10-yr bond | 8.80 | 7.4 bps |
| Interbank call | 10.26 | 3.0 bps |



Domestic News (Cont...)

- ❖ Oil Ministry is moving Cabinet to deny Reliance Industries a higher price of gas produced from its main fields in the eastern offshore KG-D6 block till the dispute over the reasons for output not matching targets is resolved. (BS)
- ❖ Ashok Leyland introduced its next generation intermediate commercial vehicle 'BOSS'. The product will be available in LE and LX variants. (BS)
- ❖ The empowered group of ministers has decided to keep Fertiliser sector as the first priority for the allocation of natural gas albeit up to 31.5 million standard cubic meters per day of natural gas while deciding to supply any additional production of gas under NELP to the power sector on priority basis. (BS)
- ❖ Outsourcing firm Serco, announced that it has been awarded the contract to partner with Abu Dhabi Systems & Information Centre (ADSIC) -- the governmental body overseeing Abu Dhabi's Information technology agenda -- to provide shared services to over 50 government departments within the United Arab Emirates. (BS)
- ❖ Hero Cycles said it is tying up with financial institutions across the country to enable weaker sections of the society to get loans for buying bicycles. (BS)
- ❖ Wind turbine maker Suzlon said its subsidiary REpower has bagged an order for supplying turbines to four wind farms in France. (BS)
- ❖ Peepul Capital-backed Madras Stock Exchange (MSE) is planning to raise around Rs 100 crore through private placement and through IPO. (BS)
- ❖ Godrej Properties, the real estate arm of the Godrej group, has raised Rs 700 crore through a rights offering. The rights issue has been over subscribed, the company said in a statement. (BS)
- ❖ Some Indian companies could see the quality of their debt decline as higher global borrowing costs and a sharply weaker rupee take their toll, Moody's Investors Service said on Thursday. (BS)
- ❖ Non-banking finance company Shriram Transport Finance is planning to raise up to Rs 500 crore through non convertible debentures (NCDs) to support financing activities. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------------------|------------------------------------|----------|-------------|--------|
| 12-Sep-13 | Financial Technologies (I | N.K. SECURITIES | SELL | 1031077 | 218.54 |
| 12-Sep-13 | Vmart Retail Ltd | KOTAK MAHINDRA (INTERNATIONAL) LTD | BUY | 383886 | 209.99 |
| 12-Sep-13 | JBFIndustries Ltd | J B F INDUSTRIES LIMITED | BUY | 800000 | 100.25 |
| 12-Sep-13 | JMT Auto Limited | BACH LIMITED | SELL | 500000 | 129.05 |
| 12-Sep-13 | IVRCL Limited | TRANSGLOBAL SECURITIES LTD. | BUY | 1802560 | 12.86 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|---|----------|-------------|--------|
| 12-Sep-13 | Westlife Dev | VONTOBEL FUND | B | 9,412,000 | 340.99 |
| 12-Sep-13 | Bharat Forge | KRUTADNYA MANAGEMENT AND TRADING SERVICES LLP | S | 8,431,225 | 250.1 |
| 12-Sep-13 | Westlife Dev | BAY CAPITAL INVESTMENTS LTD | S | 4,371,054 | 341 |
| 12-Sep-13 | Hexaware Tech | DALI LIMITED | S | 1,645,846 | 126.64 |
| 12-Sep-13 | JMT Auto | BACH LIMITED | S | 500,000 | 129.05 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|----------------------|-----------|--------------------------|-------------|
| 530043 | Acknit Inds | 13-Sep-13 | Dividend - Rs.1.50 | - |
| 531147 | ALICON | 13-Sep-13 | Dividend - Rs.2.00 | - |
| 532668 | Aurionpro Sol | 13-Sep-13 | Dividend - Rs.1.25 | - |
| 532485 | Balmer Lawr Inv | 13-Sep-13 | Dividend - Rs.11.00 | - |
| 532674 | Bannari Amman Spg | 13-Sep-13 | Dividend - Rs.2.00 | - |
| 532992 | CHL | 13-Sep-13 | Final Dividend - Rs.1.00 | - |
| 514474 | Fair Deal-\$ | 13-Sep-13 | Dividend - Rs.1.25 | - |
| 530077 | Freshtrop Fruit | 13-Sep-13 | Dividend - Rs.1.00 | - |
| 508980 | Frontier Leas | 13-Sep-13 | Final Dividend - Rs.1.00 | - |
| 533213 | Frontline Securities | 13-Sep-13 | Dividend - Rs.0.75 | - |
| 505576 | Goldcrest Fin | 13-Sep-13 | Dividend - Rs.1.00 | - |
| 500184 | Himadri Chem | 13-Sep-13 | Dividend - Rs.0.10 | - |
| 513599 | Hindustan Copp | 13-Sep-13 | Dividend - Rs.1.00 | - |
| 533181 | Intrasoft Tech | 13-Sep-13 | Dividend - Rs.1.00 | - |
| 507981 | Jindal Hotels | 13-Sep-13 | Dividend - Rs.0.80 | - |
| 532286 | Jindal Steel | 13-Sep-13 | Dividend - Rs.1.60 | - |
| 590082 | LOHIA SECURI | 13-Sep-13 | Dividend - Rs.0.20 | - |
| 517449 | Magna Electro-\$ | 13-Sep-13 | Dividend - Rs.1.80 | - |
| 521109 | Nagreeka Expo-\$ | 13-Sep-13 | Dividend - Rs.0.50 | - |
| 512634 | Savera Inds | 13-Sep-13 | Dividend - Rs.1.20 | - |
| 511108 | Shiva Taxyarn | 13-Sep-13 | Dividend - Rs.1.20 | - |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|-------------------------------------|--------|----------|----------|
| 09-Sep-13 | JPY | Current Account n.s.a. | | 0.49T | 0.34T |
| 09-Sep-13 | JPY | GDP (QoQ) | | 0.90% | 0.60% |
| 09-Sep-13 | CNY | Chinese CPI (YoY) | | 2.60% | 2.70% |
| 09-Sep-13 | CNY | Chinese PPI (YoY) | | -1.80% | -2.30% |
| 10-Sep-13 | USD | Consumer Credit | | 12.50B | 13.80B |
| 10-Sep-13 | GBP | RICS House Price Balance | | 40% | 36% |
| 10-Sep-13 | CNY | Chinese Industrial Production (YoY) | | 9.90% | 9.70% |
| 10-Sep-13 | CNY | Chinese Retail Sales (YoY) | | 13.20% | 13.20% |
| 10-Sep-13 | USD | NFIB Small Business Optimism | | | 94.1 |
| 11-Sep-13 | JPY | CGPI (YoY) | | 2.40% | 2.20% |
| 11-Sep-13 | GBP | Jobless Claims Change | | -22.0K | -29.2K |
| 11-Sep-13 | GBP | Unemployment Rate | | 7.80% | 7.80% |
| 11-Sep-13 | USD | Wholesale Inventories (MoM) | | 0.30% | -0.20% |
| 12-Sep-13 | JPY | Core Machinery Orders (MoM) | | 2.40% | -2.70% |
| 12-Sep-13 | EUR | Industrial Production (YoY) | | -0.10% | 0.30% |
| 12-Sep-13 | USD | Import Price Index (MoM) | | 0.40% | 0.20% |
| 12-Sep-13 | USD | Initial Jobless Claims | | 328K | 323K |
| 12-Sep-13 | USD | Federal Budget Balance | | -152.0B | -97.6B |
| 13-Sep-13 | JPY | Industrial Production (MoM) | | | 3.20% |
| 13-Sep-13 | USD | PPI (MoM) | | 0.20% | |
| 13-Sep-13 | USD | Retail Sales (MoM) | | 0.40% | 0.20% |
| 13-Sep-13 | USD | Michigan Consumer Sentiment | | 82 | 82.1 |
| 13-Sep-13 | USD | Business Inventories (MoM) | | 0.20% | |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|------------------------------------|--------|----------|----------|
| 10-Sep-13 | INR | Indian Trade Balance | | | -12.27B |
| 12-Sep-13 | INR | Indian CPI (YoY) | | | 9.60% |
| 12-Sep-13 | INR | Indian Industrial Production (YoY) | | | -2.20% |
| 12-Sep-13 | INR | Indian Manufacturing Output (MoM) | | | -2.20% |

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