

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6493	(0.37)	CNX IT	9463	(4.20)
Sensex	21775	(0.37)	BANK NIFTY	12141	0.98
DowJones	16109	(1.41)	S&P CNX 500	5007	(0.43)
Nasdaq	4260	(1.46)	CNX FMCG	17352	0.30
Hangseng	21603	(0.70)	CNX REALTY	177	(3.70)
Shanghai	2011	(0.38)	CNX AUTO	5509	0.49
Nikkei	14468	(2.35)	CNX ENERGY	8029	1.04
Strait Times	3069	(0.40)	CNX PHARMA	7690	(1.24)
Kospi	1924	(0.54)	Advances / Declines	BSE	NSE
Taiwan	8706	(0.48)	Advances	1287	599
FTSE	6554	(1.01)	Declines	1506	839
CAC	4251	(1.29)	Unchanged	145	105
DAX	9018	(1.86)	Total	2938	1543

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BPCL	444.40	7.63
M&M	1017.50	2.65
DRREDDY	2754.00	2.47
KOTAKBANK	763.25	2.47
ONGC	324.40	2.35

Nifty Losers		
Company	Price(Rs)	Chg(%)
INFY	3361.00	(8.45)
DLF	167.70	(6.39)
SUNPHARMA	573.35	(5.12)
JPASSOCIAT	46.55	(3.72)
RANBAXY	352.00	(3.04)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
HSIL	37.23	0.24	155
Westlife Dev	2.08	0.02	123
Shriram City Uni	4.71	0.16	29
STAMPEDE	23.69	1.00	24
MPMC	31.63	1.56	20

Indian Forex	Closing	Chg	% Chg
USD/INR	61.016	(0.075)	(0.12)
GBP/INR	101.652	0.059	0.06
EUR/INR	85.023	0.369	0.44
JPY/INR	59.460	0.070	0.12

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30360	(50)
Silver (Rs/1kg)	46833	783

Commodities	Price	% Chg.
Crude (US\$/BBL)	98.1	(0.04)
Brent (US\$/BBL)	107.3	(0.85)
Gold (US/oz)	1376.0	0.23
Silver (US\$/oz)	21.3	(0.56)
Copper (US\$/MT)	6495.0	(0.05)
Alum (US\$/MT)	1703.0	(0.79)
Zinc(US\$/MT)	1993.0	(1.09)

ADR	Cl. Values	% Chg.
ICICI Bank	40.38	(1.16)
HDFC Bank	37.54	(0.19)
Infosys	54.50	(1.51)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	44.63	(0.15)
Wipro	13.03	(0.38)
Tata Motors	32.48	(0.63)

Market Sensor

US market declined on Thursday, with the Dow Jones Industrial Average dropping over 200 points, as worries mounted about China's economy and escalating tensions in Ukraine. Dow Jones Industrial Average was down 1.41% or 231.19 points at 16108.89. Nasdaq Composite was down 1.46% or 62.91 points at 4260.42. Standard & Poor's 500 was down 1.17% or 21.86 points at 1846.34.

Indian equity market nosedived in late trade due to profit booking activity. Favorable IIP and CPI data gave market a good opening but crash in IT major Infosys on reports that the management expected sluggish growth in the current quarter weighed on overall market sentiment. Nifty ended the previous trading session with a decline of 0.37% or 23.80 points at 6493.10. On Thursday's trading session, FIIs bought net Rs.616.62 Cr in cash market and sold net Rs.377.82 in derivative segment. Whereas, DII sold net Rs.314.4 Cr in cash segment.

Coming to today's trade day Nifty to remain volatile with crucial intraday support exists at 6450 followed by 6420 while resistance is seen at 6560 followed by 6590.

Global News

❖ China's weakest start to a year for investment growth since 2001 and unexpectedly slow industrial production add pressure for economic stimulus, just as Premier Li Keqiang signals he wants to avoid such a move. (Bloomberg)

❖ Retail Sales at U.S. retailers rose in February for the first time in three months, claims for jobless benefits dropped last week and consumer confidence improved, pointing to an economy regaining traction after a harsh winter slowed demand even more than previously estimated. (Bloomberg)

❖ European Central Bank President Mario Draghi said his forward guidance may help to weaken the euro and lower real interest rates, easing the risk that inflation won't return to the goal set by policy makers. (Bloomberg)

❖ The number of Americans filing applications for unemployment benefits unexpectedly fell last week to the lowest level since the end of November, a sign of further improvement in the labor market. (Bloomberg)

Economic News

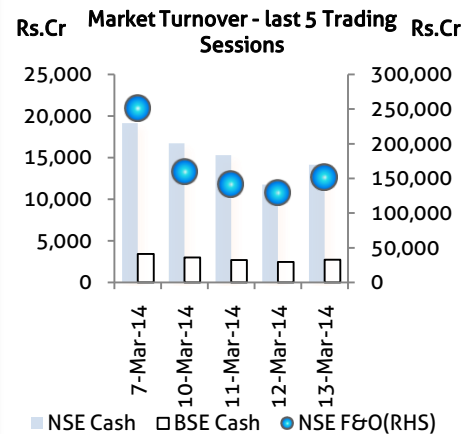
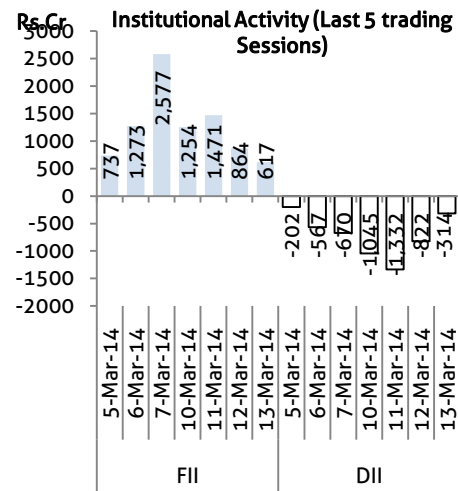
- ❖ The next generation of banking structure will be the first step to a thousand mile journey to make India the third largest banking economy in the world. The issue of "on-tap" new banking licenses will prove to be a game changer for the Indian banking industry. (BS)
- ❖ The latest version of a bill in the U.S. Congress for expedited approval of exportation of natural gas to World Trade Organization countries that seeks to accelerate exports of US natural gas could help India in meeting its gas requirement. (BS)
- ❖ The rupee has been on a winning streak since the start of this year. Despite the US cutting back its bond buying programme, the rupee has held its own. In fact, it has appreciated 1.5% over the last one month, largely driven by steady foreign capital flows into Indian bonds and stocks. The sharp improvement in the current account deficit has contributed in equal measure to the rupee's stability. (BS)
- ❖ More rain and snow are forecast in the days ahead as another system of rain-bearing clouds is expected in a couple of days, raising serious concerns about the impact on crops, which need the usually dry weather at this time of the year. (ET)
- ❖ The UPA government may have designed the direct cash transfer scheme for distributing subsidies as a game changer that will help it retain power, but clearly bureaucrats are not so convinced and very few have joined the programme. Direct benefit transfer (DBT) mission has only three people working on the project despite repeated advertisements for the post of undersecretary and below. (ET)
- ❖ Bank of America Merrill Lynch (BofA-ML) warned of a rising risk of El Nino and said in case it kicks in, the Reserve Bank will be unable to achieve its glided path for CPI. (ET)
- ❖ Indian wheat is likely to fetch a price as high as US \$ 290 a tonne in global markets in coming weeks as supply from Ukraine is likely to be hit by the escalating political turmoil there, traders said . (ET)

Domestic News

- ❖ Seasonal weakness, foreign exchange volatility and an exceptional loss led mid-size information technology (IT) services company Mphasis to posted a 2% year-on-year decline in consolidated net profit for November-January (Q1FY2014) quarter at Rs 180.6 crore, even as the company's net sales rose 24.4% to Rs 1,564 crore. (BS)
- ❖ The outlook on Tata Power was revised to positive from negative by rating agency Standard & Poor's . This move came after the central power regulator allowed the company to recover its increased costs at Mundra power plant, in the form of hiked tariff. (BS)
- ❖ The country's largest retailer, Future, will launch its biggest marketing campaign in a decade on March 24. The Rs 100-crore marketing exercise, which will run for a year, will feature a new a ad film every week for Big Bazaar, the flagship hypermarket of the group. (BS)
- ❖ Tata Motors said global sales, including Jaguar Land Rover (JLR) vehicles, declined 19.06% to 79,996 units in February from a year ago. (BS)
- ❖ SBICAP Trustee Company has sold 1.69 crore shares worth over Rs 4.52 crore of crisis-ridden Kingfisher Airlines. (BS)
- ❖ Drug-maker Jubilant Life Sciences has increased price of its nutrition product Niacin feed-grade by 18 per cent, the company said in a statement on Thursday. (BS)

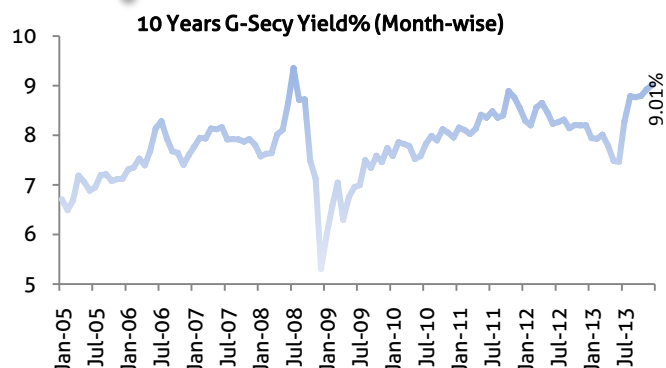
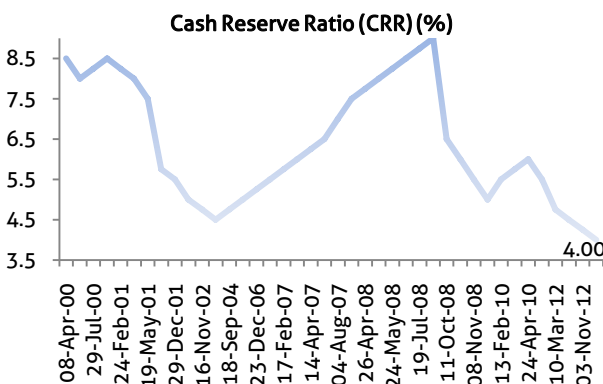
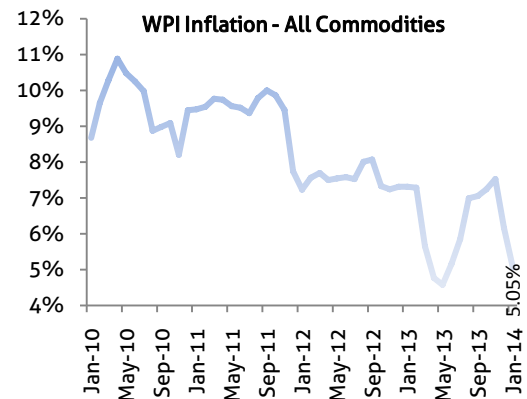
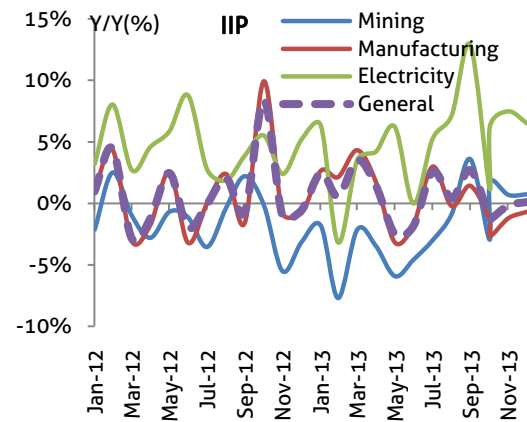
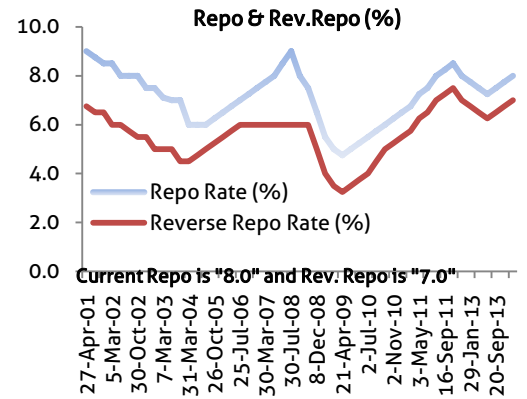
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3867	(0.0001)	(0.01)
GBP-USD	1.6621	(0.0003)	(0.02)
USD-JPY	101.80	(0.04)	(0.04)

Bond Markets	Closing	Chg
10-yr bond	9.02	-1.6 bps
Interbank call	8.08	-5.0 bps



Domestic News (Cont...)

- ❖ Private sector general insurer, Future Generali India Insurance posted a profit of Rs 28.4 crore during April-December period of the current financial year and hopes to end this fiscal with a gross written premium of Rs 1,300 crore. (BS)
- ❖ The Competition Commission of India has ordered a fresh probe against realty major DLF for allegedly imposing unfair and unreasonable conditions on apartment buyers at one of its projects in Gurgaon. (BS)
- ❖ State-owned Indian Oil Corp (IOC) is mulling setting up a Rs 30,000 crore refinery at Mundra in Gujarat as part of a plan to increase its processing capacity to 100 million tonnes. (BS)
- ❖ In a setback to the country's largest drug maker SunPharmaceuticals, the US FDA has issued an import alert for all products manufactured at its cephalosporin facility located at Karkhadi, Gujarat. The company manufactures API and formulations in this unit. (BS)
- ❖ Country's largest manganese ore producer MOIL Ltd has earmarked Rs 500 crore for mining assets' buy abroad. (BS)
- ❖ Infrastructure major Larsen & Toubro has won a Rs 3,655 crore road project in Qatar, its single largest road order in the international market. (BS)
- ❖ Pure-play loan-against-gold firm Manappuram Finance said it has signed a pact to acquire Milestone Home Finance Company from Jaypee Hotels to enter the home loan market, for an undisclosed sum. (BS)
- ❖ The Competition Appellate Tribunal will hear next month the Coal India plea challenging the Rs 1,773 crore penalty imposed on it by CCI for unfair business practices. (BS)
- ❖ Manpower requirement of the aviation sector in India is expected to grow nearly two-fold to 1.17 lakh by 2017 as carriers induct new aircrafts in the fleet, says a report. (BS)
- ❖ The country's largest two-wheeler maker Hero MotoCorp launched its all-new Splendor iSmart bike, equipped with stop-and-start i3S technology, priced at Rs 47,250 (ex-showroom Delhi). (BS)
- ❖ Generic drugmaker Dr Reddy's Laboratories Ltd is recalling about 58,656 bottles of the heartburn drug lansoprazole in the United States due to a microbial contamination, the US Food and Drug Administration said. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
13-Mar-14	Shriram City Union Financ	VONTOBEL INDIA SELECT FUND	SELL	409000	980.0
13-Mar-14	Mastek Ltd	MASTEK LIMITED BUYBACK OFFER	BUY	576000	219.8
13-Mar-14	HSIL Limited	T.ROWE PRICE INTERNATIONAL DISCOVERY FUND	SELL	580000	120.6
13-Mar-14	MBL Infrastructures Ltd	JAI ART N IMAGE PRIVATE LIMITED	SELL	100000	128.9
13-Mar-14	Mangalam Timber Pro Ltd	CENTURY TEXTILE & INDUSTRIES L	BUY	300000	11.6

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
13-Mar-14	Shriram City Uni	VONTOBEL INDIA SELECT FUND	S	471,000	980.0
13-Mar-14	HSIL	T. ROWE PRICE INTERNATIONAL DISCOVERY FUND	S	3,280,000	111.1
13-Mar-14	Financial Tech	OM KEDAR INVESTMENTS	S	700,000	389.0
13-Mar-14	Sterling Hol Res-\$	MACQUARIE BANK LIMITED	S	570,000	92.5
13-Mar-14	Dhampur Sug Mil	SECURITIES HOLDINGS INDIA PVT LTD	S	991,566	38.1

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532751	Easun Reyrolle	13-Mar-14	Right12:25	17-Mar-14
532481	Noida Toll	13-Mar-14	Interim Dividend - Rs.1.50	14-Mar-14
534060	Priti Mercantile	13-Mar-14	BONUS 8:10	15-Mar-14
580001	Standard Chartered	13-Mar-14	Final Dividend - Rs.-	14-Mar-14
513335	Ahmednagar Forg	14-Mar-14	Dividend - Rs.1.00	-
530479	ATLINFRA	14-Mar-14	Stock Split from Rs.10/- to Re.1/-	18-Mar-14
530579	GOLDEN GOEN	18-Mar-14	Right9:5	19-Mar-14
531731	Aarya Global Shares	19-Mar-14	Consolidation of Shares	20-Mar-14
517354	Havells India	19-Mar-14	Interim Dividend - Rs.-	20-Mar-14
511016	Premier Cap	19-Mar-14	Stock Split from Rs.10/- to Re.1/-	20-Mar-14
500400	Tata Power	19-Mar-14	Right7:50	20-Mar-14
512067	Vishvjyoti Trd	19-Mar-14	Stock Split from Rs.10/- to Re.1/-	20-Mar-14
520077	Amtek Auto-\$	20-Mar-14	Dividend - Rs.0.50	-
532282	Amtek India-\$	20-Mar-14	Dividend - Rs.0.10	-
532178	Engineers India	20-Mar-14	Interim Dividend - Rs.-	21-Mar-14
532129	Hexaware Tech	20-Mar-14	Final Dividend - Rs.1.00	-
524330	Jayant Agro	20-Mar-14	Interim Dividend - Rs.2.50	21-Mar-14
500249	KSB Pumps	20-Mar-14	Final Dividend - Rs.4.50	-
513544	Mardia Samyoung	20-Mar-14	Reduction of Capital	21-Mar-14
536666	STAR FERRO	20-Mar-14	Interim Dividend - Rs.0.33	21-Mar-14
500410	ACC	24-Mar-14	Final Dividend - Rs.19.00	-
520056	Sundaram Clayton	24-Mar-14	2nd Interim Dividend - Rs.-	25-Mar-14

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
10-Mar-14	JPY	Current Account n.s.a.		-1.411T	-0.639T
10-Mar-14	JPY	GDP (YoY)		1.00%	1.00%
10-Mar-14	EUR	Sentix Investor Confidence		14	13.3
11-Mar-14	GBP	Industrial Production (YoY)		3.00%	1.80%
11-Mar-14	GBP	Manufacturing Production (YoY)		3.30%	1.50%
11-Mar-14	USD	NFIB Small Business Optimism			94.1
11-Mar-14	USD	Wholesale Inventories (MoM)		0.30%	0.30%
12-Mar-14	JPY	CGPI (YoY)		2.10%	2.40%
12-Mar-14	GBP	Trade Balance		-8.70B	-7.72B
12-Mar-14	EUR	Industrial Production (YoY)		1.90%	0.50%
12-Mar-14	USD	Federal Budget Balance		-170.0B	-10.4B
13-Mar-14	JPY	Core Machinery Orders (YoY)		18.80%	6.70%
13-Mar-14	GBP	RICS House Price Balance		53%	53%
13-Mar-14	CNY	Chinese Industrial Production (YoY)		9.50%	9.70%
13-Mar-14	USD	Initial Jobless Claims			
13-Mar-14	USD	Import Price Index (MoM)		0.30%	0.10%
13-Mar-14	USD	Retail Sales (MoM)		0.20%	-0.40%
13-Mar-14	USD	Business Inventories (MoM)		0.30%	0.50%
14-Mar-14	JPY	Industrial Production (MoM)			4.00%
14-Mar-14	USD	Michigan Consumer Sentiment			81.6
14-Mar-14	USD	PPI			

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
11-Mar-14	INR	Indian Exports (USD)			26.75B
11-Mar-14	INR	Indian Imports (USD)			36.67B
11-Mar-14	INR	Indian Trade Balance			-9.92B
12-Mar-14	INR	Indian CPI (YoY)			8.79%
12-Mar-14	INR	Indian Industrial Production (YoY)			-0.60%
12-Mar-14	INR	Indian Manufacturing Output (MoM)			-1.60%
14-Mar-14	INR	Indian WPI (YoY)			5.05%

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