

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 7534 | (0.11) | CNX IT | 9580 | 1.39 |
| Sensex | 25190 | (0.15) | BANK NIFTY | 15030 | (0.51) |
| DowJones | 16781 | 0.03 | S&P CNX 500 | 6057 | (0.01) |
| Nasdaq | 4321 | 0.24 | CNX FMCG | 17958 | 0.56 |
| Hangseng | 23204 | (0.42) | CNX REALTY | 3712 | (0.69) |
| Shanghai | 2071 | (0.72) | CNX AUTO | 6669 | (1.04) |
| Nikkei | 15008 | 0.50 | CNX ENERGY | 10063 | (0.10) |
| Strait Times | 3276 | (0.42) | CNX PHARMA | 8023 | 0.46 |
| Kospi | 1998 | 0.20 | Advances / Declines | BSE | NSE |
| Taiwan | 9222 | 0.20 | Advances | 1377 | 529 |
| FTSE | 6755 | (0.34) | Declines | 1576 | 597 |
| CAC | 4510 | (0.73) | Unchanged | 116 | 27 |
| DAX | 9884 | (0.29) | Total | 3069 | 1153 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| GAIL | 435.25 | 4.77 |
| BPCL | 588.50 | 3.29 |
| TCS | 2270.00 | 2.55 |
| SUNPHARMA | 645.00 | 2.43 |
| DLF | 209.85 | 2.42 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| M&M | 1192.70 | (2.94) |
| AXISBANK | 1771.90 | (2.54) |
| LT | 1646.90 | (2.32) |
| HDFC | 960.00 | (2.01) |
| TATAMOTORS | 429.60 | (1.97) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|------------------|-----------------|------------------|------------------|
| Solar Inds | 0.92 | 0.0 | 25 |
| Trent | 1.91 | 0.1 | 18 |
| Mahindra Lifesp | 1.11 | 0.2 | 7 |
| Luminaire Tech | 23.34 | 5.7 | 4 |
| Indraprastha Gas | 1.61 | 0.4 | 4 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|-------|-------|
| USD/INR | 60.006 | 0.528 | 0.89 |
| GBP/INR | 101.998 | 1.063 | 1.05 |
| EUR/INR | 81.254 | 0.542 | 0.67 |
| JPY/INR | 58.960 | 0.680 | 1.17 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 27575 | 575 |
| Silver (Rs/1kg) | 42248 | 684 |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 106.6 | (0.25) |
| Brent (US\$/BBL) | 112.7 | 0.20 |
| Gold (US/oz) | 1271.7 | (0.19) |
| Silver (US\$/oz) | 19.6 | (0.25) |
| Copper (US\$/MT) | 6735.0 | 0.95 |
| Alum (US\$/MT) | 1802.0 | 0.06 |
| Zinc(US\$/MT) | 2085.0 | 0.58 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 48.97 | (1.18) |
| HDFC Bank | 46.81 | (0.52) |
| Infosys | 54.30 | 0.32 |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 40.08 | (0.34) |
| Wipro | 11.63 | 0.10 |
| Tata Motors | 38.75 | 0.56 |

Market Sensor

US market on Monday managed to end mildly up for a second session as unease over escalating unrest in Iraq curbed enthusiasm over upbeat economic reports and activity on the corporate deal-making front. Dow Jones Industrial Average was up 0.03% or 5.27 points at 16781.01. Nasdaq Composite was up 0.24% or 10.45 points at 4321.11. Standard & Poor's 500 was up 0.08% or 1.62 points at 1937.78.

Indian Equity market opened on a negative note on the backdrop of concerns over the situation in Iraq which was further exacerbated by higher than expected numbers of WPI inflation coming in at 5 months high at 6.1%. Nifty ended the previous trading session with a decline of 0.11% or 8.55 points at 7533.55. On Monday's trading session, FIIs sold net Rs.194.1 Cr in cash market and bought net Rs.215.30 in derivative segment. Whereas, DII sold net Rs.448.3 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7485 followed by 7450 while resistance is seen at 7590 followed by 7650.

Global News

❖The International Monetary Fund cut its growth forecast for the U.S. economy this year and said the Federal Reserve may have scope to keep interest rates at zero for longer than investors expect. (Bloomberg)

❖China Minsheng Investment Corp., the country's largest private-sector investment group, will invest \$1.5 billion and open its European headquarters in London, the U.K. said, as Chinese Premier Li Keqiang began a visit. (Bloomberg)

❖Brent crude was projected by Wall Street analysts to average as much as \$116 a barrel by the end of the year. Now, with violence escalating in Iraq, how far the price will rise has become anyone's guess. (Bloomberg)

❖Russia's central bank, which has raised borrowing costs twice in 2014, kept its benchmark interest rate unchanged with inflation set to peak this month and the ruble recovering from a five-year low. (Bloomberg)

❖American manufacturers are churning out more goods and homebuilders are regaining confidence as evidence mounts that the world's largest economy is making a comeback after a slow start to 2014. (Bloomberg)

Economic News

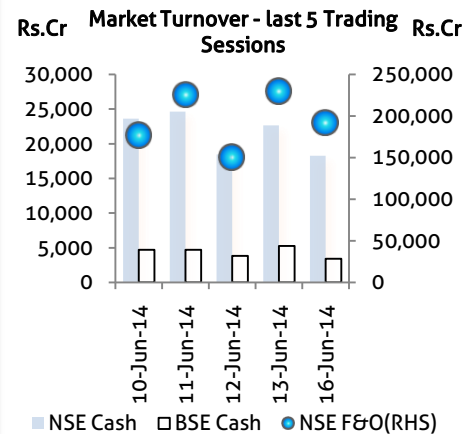
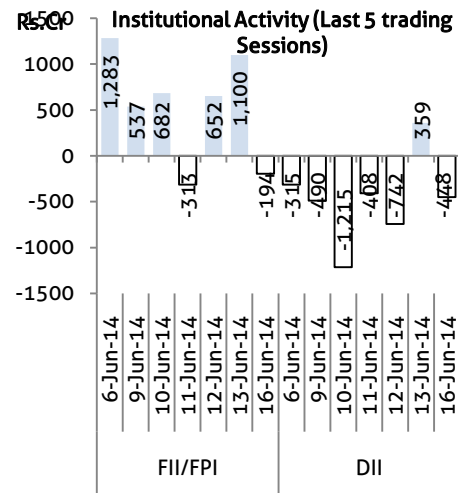
- ❖ The fate of more than 100 projects requiring green clearances, including the Narcondam Island project, will be decided by Prime Minister Narendra Modi. (BS)
- ❖ Vegetable oil imports in the month of May saw a rise of 13% compared to the same period last year at 1 million tonnes compared to 917,964 tonnes last year on the back of lower soybean crushing in the country as the availability of soybean is on the lower side this year, according to data released by Solvent Extractors' Association of India. (BS)
- ❖ Foreign direct investment in defence sector will help in increasing defence preparedness of the country and at the same time reduce dependence on imports, Commerce and Industry Minister Nirmla Sitharaman said. (BS)
- ❖ Rising prices of food and beverages like coffee, tea, poultry, fish and vegetables pushed up inflation to 5-month high of 6.01 per cent in May. The Wholesale Price Index (WPI)-based inflation was 5.20 per cent in April and 4.58 per cent a year ago in May. (BS)
- ❖ Amid buzz of a one-time higher dose of diesel price hike, the under recovery on diesel prices came down further to Rs 1.62 a litre for the current fortnight. The under-recoveries for the financial year 2014-15 are projected to be Rs 91,665 crore while the figure was Rs 1,39,869 in the 2013-14. (BS)
- ❖ The new government has decided to keep the idea of convergence of financial and commodities market regulator as recommended by the FSLRC on the back burner for the time being. (BS)
- ❖ Indian Renewable Energy Development Agency Ltd (IREDA), the financing agency supporting renewable energy projects in India, has said it is expecting around Rs 150-200 crore equity infusion from the Centre. The Agency also requested the Centre to reduce its guarantee fee, so that it can bring down the interest rate. (BS)
- ❖ Coal and Power Minister Piyush Goyal has met top officials of both the ministries to thrash out the issues related to coal pricing and the quality of the fuel. (BS)
- ❖ Prime Minister Narendra Modi said India is committed to good neighbourly relations and assured Bhutan that change in government will not alter the dynamics of Indo-Bhutan ties. (BS)
- ❖ The Tamil Nadu Government plans to set up a Financial City on the outskirts of Chennai. Reports stated that the state administration is looking at Sriperumbudur or Oragadam for the proposed city, which is expected to create around 30,000 jobs. (BS)
- ❖ After the last year's widespread devastation caused by the flash floods in Uttarakhand, the state government appeared to have learnt no lesson. (BS)

Domestic News

- ❖ Ore-starved KIOCL Ltd, the public sector miner, has embarked on a slew of measures to not only cut costs but also to sustain its stand-alone pellet plant. Signing an operation and maintenance (O&M) contract, VRS Plan and disposal of mining assets are among the measures initiated by the company to keep itself slim and profitable. (BS)
- ❖ POSCO Engineering & Construction India, a wholly-owned subsidiary of POSCO E&C Co, Korea, signed a memorandum of understanding with India's PNC Infratech to jointly develop and execute infrastructure projects in India and neighbouring countries. (BS)

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.3564 | (0.0010) | (0.07) |
| GBP-USD | 1.6969 | (0.0015) | (0.09) |
| USD-JPY | 102.00 | 0.17 | 0.17 |

| Bond Markets | Closing | Chg |
|----------------|---------|----------|
| 10-yr bond | 8.67 | 6.90 bps |
| Interbank call | 8.65 | 0.45 bps |



Domestic News (Cont...)

❖ In a major blow to Tata Steel, the Orissa High Court ordered the local government to restrain from allocating Sukinda chromite deposits to the private sector steel behemoth till June 19, the scheduled date of next hearing of the case. The court issued a notice to Tata Steel. (BS)

❖ In a violation of court order, the employees of Metcore Steel and Alloys Ltd restrained inspection of ferrochrome stocks to the representatives of the public sector Steel Authority of India (SAIL) and scam hit National Spot Exchange Ltd (NSEL) on Thursday. (BS)

❖ A British court has ruled in Batelco's favour, ordering the Bahraini telecom operator's former Indian partner to pay it \$211.1 million for failing to fulfil a previous agreement, a statement to Manama's bourse said on Monday. (BS)

❖ JPMorgan Asset Management India announced the launch of JPMorgan Emerging Markets Opportunities Equity Offshore Fund, an open ended fund of funds scheme that seeks to provide long term capital growth to its investors. (BS)

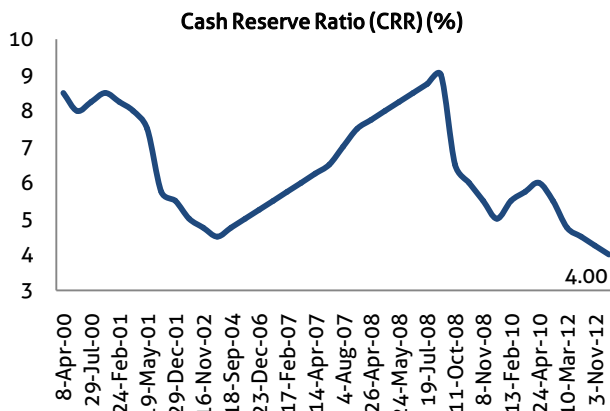
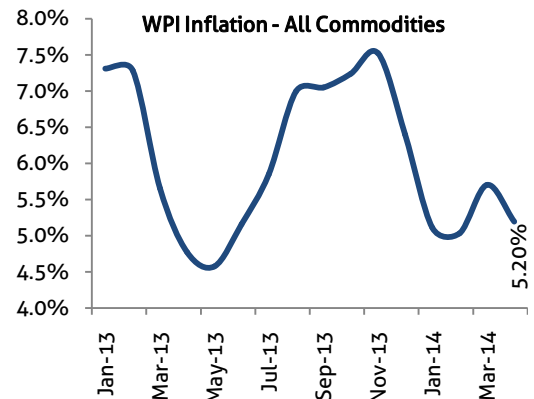
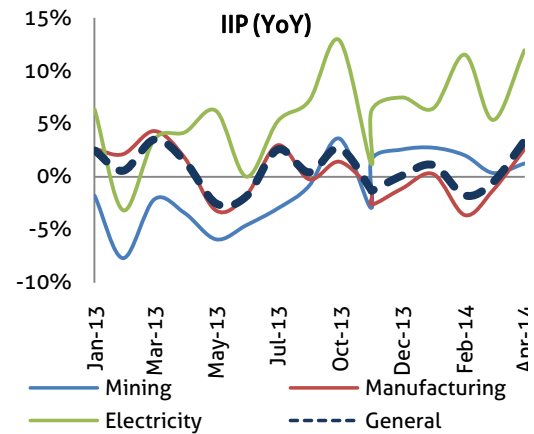
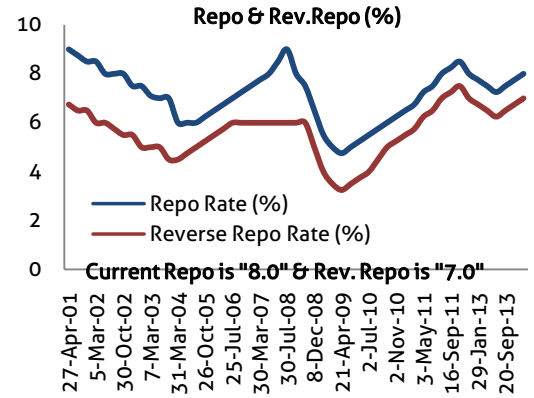
❖ Wipro has won a transformational IT applications and infrastructure contract from 7-Eleven, a leading convenience store chain in Australia. (BS)

❖ A former secretary in the Civil Aviation department has been examined by CBI as a witness in connection with alleged irregularities in the supply of 43 aircraft to the erstwhile Indian Airlines by Airbus. (BS)

❖ Suryoday Micro Finance got next round of funding of Rs 27 crore. International Financial Corporation (IFC) invested about Rs 15 crore while current investors Aavishkaar Goodwell and Lok Capital invested Rs 6.2 crore each in the company. Intelicap Investment Banking practice acted as the sole advisor for Suryoday in this transaction. (BS)

❖ State-owned ONGC may raise its stake in Cairn India's prolific Rajasthan oil fields as a condition for agreeing to allow the Anil Agarwal-group firm operate the block after expiry of contractual period. (BS)

❖ In order to streamline and speed up its work and improve efficiency, the Gujarat Food and Drug Control Administration (FDCA) is set to launch a system wherein dedicated softwares would be utilised and gadgets would be given to field officers. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------------------|---|----------|-------------|-------|
| 16-Jun-14 | Unitech Ltd | ADROIT SHARE & STOCK BROKER PVT. LTD. | SELL | 15412610 | 31.9 |
| 16-Jun-14 | Alok Industries Limited | ADROIT FINANCIAL SERVICES PRIVATE LIMITED | BUY | 10474192 | 13.8 |
| 16-Jun-14 | KNR Constructions Limited | DSP BLACKROCK INDIA T.I.G.E.R. FUND | BUY | 185427 | 185.0 |
| 16-Jun-14 | Orbit Corporation Limited | IFCI LTD. | SELL | 747290 | 24.3 |
| 16-Jun-14 | Burnpur Cement Limited | PROMPT CORPORATE SERVICES LTD. | BUY | 400000 | 12.8 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|------------------|---|----------|-------------|-------|
| 16-Jun-14 | Ponni Sugar Erod | LUCKY VALLEY INVESTMENTS AND HOLDINGS LIMITED | S | 165,405 | 155.0 |
| 16-Jun-14 | STAMPEDE | AJAY MULTI PROJECTS LIMITED | S | 142,000 | 113.0 |
| 16-Jun-14 | GPT Infra | DIVYAM TIE UP PRIVATE LTD | B | 125,000 | 104.5 |
| 16-Jun-14 | ARNOLD HOLD | RAMESH SAWALRAM SARAOGI | B | 30,000 | 256.0 |
| 16-Jun-14 | CDR INDUSTRI | SHRADDHA INVESTMENT | B | 19,900 | 320.9 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|-------------------|-----------|------------------------------------|-------------|
| 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 |
| 500730 | NOCIL | 19-Jun-14 | Dividend - Rs.0.60 | - |
| 512626 | Orbit Exports | 19-Jun-14 | Final Dividend - Rs.1.25 | - |
| 522152 | Solitaire Mach | 19-Jun-14 | Dividend - Rs.0.50 | - |
| 532477 | Union Bank | 19-Jun-14 | Final Dividend - Rs.1.30 | - |
| 532144 | WELCORP | 19-Jun-14 | Dividend - Rs.0.50 | - |
| 514162 | Welspun India | 19-Jun-14 | Dividend - Rs.3.00 | - |
| 500027 | Atul | 20-Jun-14 | Dividend - Rs.7.50 | - |
| 506401 | Deepak Nitrite-\$ | 20-Jun-14 | BONUS 1:1 | 23-Jun-14 |
| 506401 | Deepak Nitrite-\$ | 20-Jun-14 | Stock Split from Rs.10/- to Rs.2/- | 23-Jun-14 |
| 532401 | Vijaya Bank | 20-Jun-14 | Final Dividend - Rs.1.00 | - |
| 526433 | ASM Tech | 23-Jun-14 | Final Dividend - Rs.1.80 | - |
| 521220 | Damodar Ind-\$ | 23-Jun-14 | Final Dividend - Rs.1.00 | - |
| 532814 | Indian Bank | 23-Jun-14 | Final Dividend - Rs.1.70 | - |
| 532859 | Hinduja Glob | 24-Jun-14 | Final Dividend - Rs.10.00 | - |
| 532505 | Uco Bank | 24-Jun-14 | Final Dividend - Rs.1.00 | - |
| 513353 | Cochin Mnrl-\$ | 25-Jun-14 | Dividend - Rs.1.00 | - |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|--------------------------------------|--------|----------|----------|
| 16-Jun-14 | EUR | CPI (YoY) | | 0.50% | 0.50% |
| 16-Jun-14 | USD | NY Empire State Manufacturing Index | | 15.7 | 19.01 |
| 16-Jun-14 | USD | Overall Net Capital Flow | | | -126.10B |
| 16-Jun-14 | USD | TIC Net Long-Term Transactions | | | 4.0B |
| 16-Jun-14 | USD | Industrial Production (MoM) | | 0.40% | -0.60% |
| 17-Jun-14 | GBP | CPI (YoY) | | 1.70% | 1.80% |
| 17-Jun-14 | GBP | PPI Input (MoM) | | 0.20% | -1.10% |
| 17-Jun-14 | GBP | RPI (YoY) | | 2.50% | 2.50% |
| 17-Jun-14 | USD | Building Permits | | 1.075M | 1.059M |
| 17-Jun-14 | USD | CPI (YoY) | | 2.00% | 2.00% |
| 17-Jun-14 | USD | Housing Starts | | 1.034M | 1.072M |
| 18-Jun-14 | JPY | Trade Balance | | -1,173B | -809B |
| 18-Jun-14 | USD | MBA 30-Year Mortgage Rate | | | 4.34% |
| 18-Jun-14 | USD | Current Account | | -95.9B | -81.1B |
| 19-Jun-14 | GBP | Retail Sales (MoM) | | -0.50% | 1.30% |
| 19-Jun-14 | GBP | CBI Industrial Trends Orders | | 2 | |
| 19-Jun-14 | USD | Continuing Jobless Claims | | | 2,603K |
| 19-Jun-14 | USD | Initial Jobless Claims | | | 312K |
| 19-Jun-14 | USD | Philadelphia Fed Manufacturing Index | | 14.8 | 15.4 |
| 20-Jun-14 | EUR | Consumer Confidence | | -6.8 | -7.1 |
| 20-Jun-14 | EUR | Current Account n.s.a. | | 15.0B | 20.9B |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|------------------|--------|----------|----------|
| 16-Jun-14 | INR | Indian WPI (YoY) | | 5.40% | 5.20% |

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