

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 7632 | 1.30 | CNX IT | 9620 | 0.42 |
| Sensex | 25521 | 1.31 | BANK NIFTY | 15373 | 2.28 |
| DowJones | 16808 | 0.16 | S&P CNX 500 | 6139 | 1.36 |
| Nasdaq | 4337 | 0.37 | CNX FMCG | 17906 | (0.29) |
| Hangseng | 23212 | 0.03 | CNX REALTY | 3825 | 3.05 |
| Shanghai | 2062 | (0.21) | CNX AUTO | 6704 | 0.53 |
| Nikkei | 15041 | 0.44 | CNX ENERGY | 10316 | 2.51 |
| Strait Times | 3273 | (0.06) | CNX PHARMA | 8037 | 0.17 |
| Kospi | 1994 | (0.36) | Advances / Declines | BSE | NSE |
| Taiwan | 9253 | 0.13 | Advances | 2047 | 1156 |
| FTSE | 6767 | 0.18 | Declines | 952 | 376 |
| CAC | 4536 | 0.58 | Unchanged | 111 | 44 |
| DAX | 9920 | 0.37 | Total | 3110 | 1576 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| ONGC | 445.80 | 4.43 |
| AXISBANK | 1843.80 | 3.99 |
| ASIANPAINT | 561.10 | 3.94 |
| PNB | 982.35 | 3.77 |
| INDUSINDBK | 553.75 | 3.61 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| M&M | 1182.00 | (1.34) |
| MCDOWELL-N | 2759.00 | (0.89) |
| HEROMOTOCO | 2590.00 | (0.82) |
| HINDUNILVR | 630.00 | (0.75) |
| DRREDDY | 2411.85 | (0.52) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|----------------|-----------------|------------------|------------------|
| INFOTECH ENR | 11.20 | 0.1 | 121 |
| Hinduja Glob | 1.16 | 0.1 | 21 |
| Natco Pharma | 1.86 | 0.1 | 14 |
| Repco Home Fin | 2.03 | 0.2 | 11 |
| Ceat | 4.39 | 0.6 | 7 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|-------|-------|
| USD/INR | 60.368 | 0.362 | 0.60 |
| GBP/INR | 102.481 | 0.483 | 0.47 |
| EUR/INR | 81.867 | 0.612 | 0.75 |
| JPY/INR | 59.210 | 0.250 | 0.42 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 27275 | (300) |
| Silver (Rs/1kg) | 41934 | (314) |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 106.7 | 0.08 |
| Brent (US\$/BBL) | 113.4 | 0.59 |
| Gold (US/oz) | 1270.4 | (0.10) |
| Silver (US\$/oz) | 19.7 | 0.61 |
| Copper (US\$/MT) | 6711.0 | (0.36) |
| Alum (US\$/MT) | 1808.5 | 0.36 |
| Zinc(US\$/MT) | 2112.0 | 1.29 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 49.35 | 0.38 |
| HDFC Bank | 46.98 | 0.17 |
| Infosys | 53.83 | 0.24 |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 39.86 | (0.22) |
| Wipro | 11.73 | 0.10 |
| Tata Motors | 39.39 | 0.64 |

Market Sensor

US market on Tuesday extended gains into a third session after a May rise in consumer prices came in larger than expected, with the data coming a day ahead of the Federal Reserve's monetary-policy decision. Dow Jones Industrial Average was up 0.16% or 27.48 points at 16808.49. Nasdaq Composite was up 0.37% or 16.13 points at 4337.23. Standard & Poor's 500 was up 0.22% or 4.21 points at 1941.99.

Indian Equity market witnessed a choppy session but late hour rally as crude oil prices eased led the Bulls to regain momentum. Nifty ended the previous trading session with a gain of 1.30% or 98.15 points at 7631.70. On Tuesday's trading session, FII's bought net Rs.48.02 Cr in cash market and bought net Rs.469.77 in derivative segment. Whereas, DII sold net Rs.236.79 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7590 followed by 7550 while resistance is seen at 7675 followed by 7720.

Global News

❖ Japan's exports fell in May for the first time in 15 months on weak demand from the U.S. and Asia, adding to challenges for Prime Minister Shinzo Abe as he tries to steer the economy through a forecast contraction this quarter. (Bloomberg)

❖ BP Plc (BP/) signed a \$20 billion deal to supply liquefied natural gas to China National Offshore Oil Corp. (883), one of a number of contracts announced during a visit by Chinese Premier Li Keqiang to the U.K. (Bloomberg)

❖ U.K. Prime Minister David Cameron and his Chinese counterpart, Li Keqiang, agreed to work together to spur growth in their two countries after talks in London. (Bloomberg)

❖ Consumer prices rose in May by the most in more than a year, showing U.S. companies are gaining some pricing power as the economy strengthens, and the homebuilding industry stabilized after a first-quarter swoon. (Bloomberg)

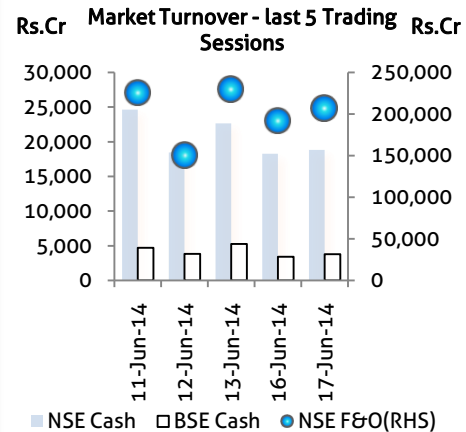
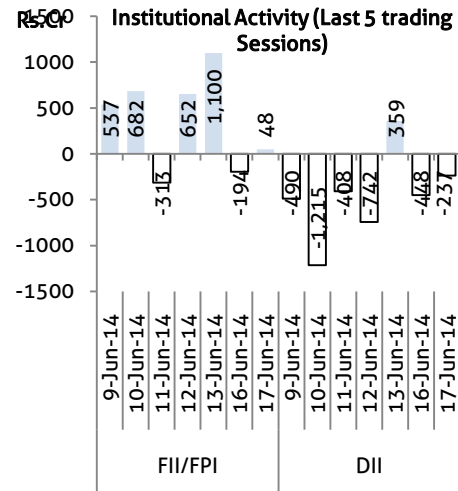
❖ Bond buyers are betting more than ever on the mercy of Mother Nature as they seek to boost yields being suppressed by central banks. (Bloomberg)

Economic News

- ❖ The Government has not lost the estimated Rs 2,400 crore in permitting merger of service areas - Chennai and Tamil Nadu, while not allowing the same in services areas like Maharashtra and Mumbai, Kolkata and West Bengal, UP (east and UP (west), according to a recent discussion of the Department of Telecommunications (DoT). (BS)
- ❖ With inflation touching a five-month high, the Reserve Bank said its efforts would be focused on containing any spurt in prices and keeping a close eye on developments in Iraq, which have already jacked up oil prices. (BS)
- ❖ With foreign investment almost drying up in India's oil and gas sector, Petroleum Minister Dharmendra Pradhan promised an overhaul to make policies predictable, transparent and fair to investors. (BS)
- ❖ Concerned over rising onion rates, the government imposed a minimum export price (MEP) of \$300 per tonne on the kitchen staple to curb overseas sales and check retail prices. (BS)
- ❖ Satellite communications companies will now be able to operate in India at a lower cost. The Telecom Commission has decided to reduce the licence fee for these companies based on recommendations from the Telecom regulatory Authority of India (Trai) and a committee of the Department of Telecommunications (DoT). (BS)
- ❖ Major highways builders in India have an opportunity to bid for 13 PPP road projects in Ghana including a few that are being build through assistance by the World Bank, officials said here. (BS)
- ❖ The central government is mulling several options to bring down the subsidy burden on account of the Food Security Bill. (BS)
- ❖ Revenue from entry tax collection declined in the last financial year as compared to the previous fiscal, West Bengal Finance Minister Amit Mitra told the Assembly here. (BS)
- ❖ Opposition leaders attacked Finance Minister Arun Jaitley for saying that hoarding and poor rainfall were responsible for rising inflation. (BS)
- ❖ Indian coal imports climbed 12% in May from the year before, provisional data from research firm OreTeam showed, with power companies scrambling to meet demand as scorching weather drove customers to crank up fans or air conditioning. (BS)
- ❖ The Reserve Bank said it is closely watching inflation situation and hoped that proper food management will help in easing of food prices. (BS)

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|--------|-------|
| EUR-USD | 1.3548 | 0.0001 | 0.01 |
| GBP-USD | 1.6965 | 0.0000 | 0.00 |
| USD-JPY | 102.15 | 0.00 | 0.00 |

| Bond Markets | Closing | Chg |
|----------------|---------|----------|
| 10-yr bond | 8.66 | -1.4 bps |
| Interbank call | 8.46 | 19 bps |



Domestic News

- ❖ Hindustan Aeronautics Limited (HAL), the defence ministry undertaking, plans to undertake a massive modernization of its facilities across the country involving an investment of Rs 6,000 crore. (BS)
- ❖ Zee Entertainment Enterprises Limited (ZEEL) had expressed confidence that its new general entertainment channel (GEC) to be launched soon would give "positive" return to the investment. (BS)
- ❖ Civil aviation ministry will examine the issue of grant of permit to AirAsia following BJP leader Subramanian Swamy's complaint that it violated government norms. (BS)
- ❖ Tata Steel will seek shareholders nod to raise up to Rs 14,000 crore through privately placed debt securities in domestic as well as global markets. (BS)

Domestic News (Cont...)

❖ Mumbai-based Cipla Ltd has acquired 60% stake in a Sri Lanka-based company for \$14 million. The company, name of which was not yet disclosed, would market Cipla's products in the country, Cipla said on Tuesday. (BS)

❖ Even after the introduction of mechanism for third party sampling of the quality of coal, the Power Ministry has alleged there are multiple grade slippages in the coal being supplied by CIL to NTPC power plants. (BS)

❖ Inox Wind, a subsidiary of India's leading wind power solutions provider Gujarat Fluorochemicals, has bagged Rs 900 crore order for 170 MW project in and around Ratlam and Mandasaur districts of Madhya Pradesh. (BS)

❖ Shriram Transport Finance Ltd plans to borrow up to Rs 3,000 crore through non-convertible debentures (NCDs) to support its financing activities. (BS)

❖ Bharti Airtel and Uninor led subscriber additions in May, when the GSM base in the country grew marginally to 73.3 crore with 61.9 lakh new mobile users, the Cellular Operators Association of India (COAI) said. (BS)

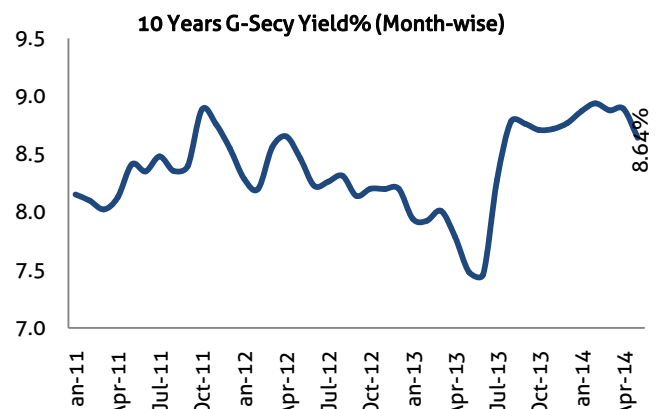
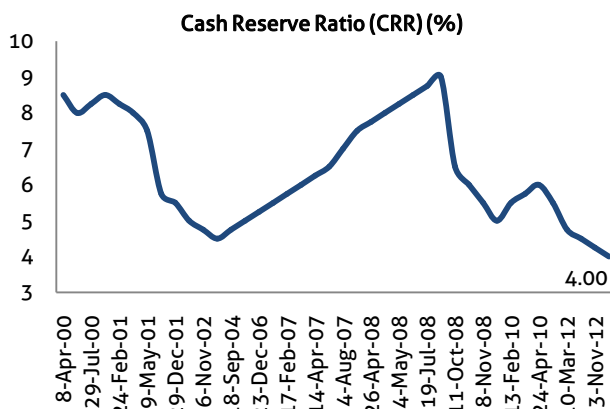
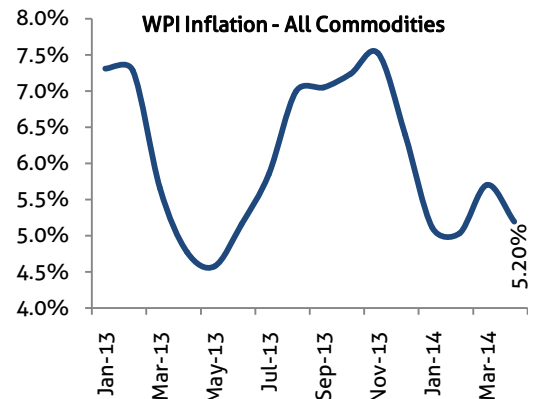
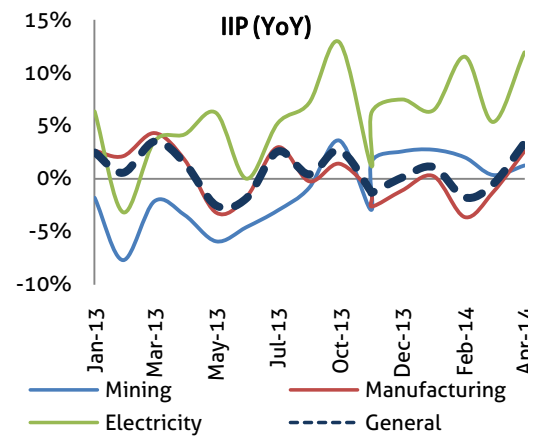
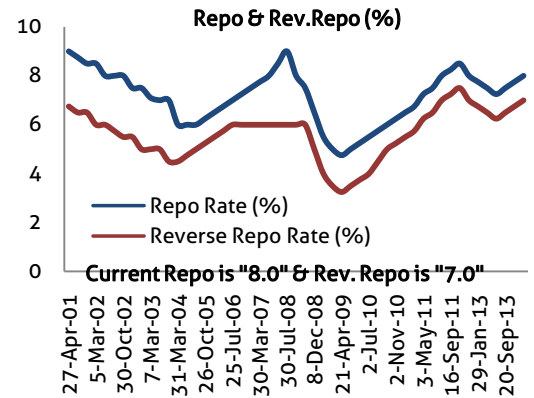
❖ In its biggest fund raising ever, Adani Group is all set to raise \$2.5 billion (Rs 15,000 crore) from investors both in India and abroad as the group companies witness an unprecedented boom in the stock markets with a pro-business government led by Narendra Modi at the Centre. (BS)

❖ Association of Power Producers, a body representing private electricity generation companies, has asked the Power Ministry to halt the bidding process for two proposed 4,000 MW ultra mega power projects in Tamil Nadu and Odisha, saying the projects are not economically viable. (BS)

❖ Cairn India has received environmental nod for raising crude oil production from its prolific Rajasthan fields by 50% to 300,000 barrels per day (15 million tons a year). (BS)

❖ The government is expected to resolve the contentious issue of coal quality supplies between power producer NTPC and Coal India Ltd within a couple of weeks. (BS)

❖ Adani Enterprises Ltd faces a new delay on a planned coal mine in Australia, amid worries that a port expansion to accommodate the project could hurt the World Heritage-listed Great Barrier Reef. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|-------------------------|---|----------|-------------|-------|
| 17-Jun-14 | Alok Industries Limited | ADROIT FINANCIAL SERVICES PRIVATE LIMITED | SELL | 7163724 | 15.2 |
| 17-Jun-14 | Essar Shipping Limited | LEMAR DIVERSIFIED FUND | BUY | 1900000 | 25.0 |
| 17-Jun-14 | Bhartiya Intl Limited | GLOBTECH ADVISORY SERVICES LIMITED | SELL | 100000 | 311.0 |
| 17-Jun-14 | Dr. Datson's Labs Ltd | HESHIKA GROWTH FUND | SELL | 465520 | 18.5 |
| 17-Jun-14 | Bilpower Limited | CHOUDHARY SURESHKUMAR AMANDILAL | SELL | 315366 | 3.8 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|------------------|---|----------|-------------|-------|
| 17-Jun-14 | Essar Shipping | THE ROYAL BANK OF SCOTLAND ASIA MERCHANT BANK (SINGAPORE) LIMITED | S | 1,900,000 | 25.0 |
| 17-Jun-14 | Hinduja Found-\$ | AFRIN DIA | B | 1,000,000 | 41.0 |
| 17-Jun-14 | Inventure Growth | JAYSHREEN RITA | S | 3,500,000 | 11.0 |
| 17-Jun-14 | Bhartiya Intl | GLOBTECH ADVISORY SERVICES LIMITED | S | 100,000 | 311.1 |
| 17-Jun-14 | SIEL | SUSHILA GOYAL | B | 99,800 | 200.4 |

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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