

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8869	0.68	CNX IT	12633	1.17
Sensex	29320	0.63	BANK NIFTY	19297	0.56
DowJones	18030	(0.10)	S&P CNX 500	7229	0.75
Nasdaq	4906	0.14	CNX FMCG	22196	0.85
Hangseng	24832	0.19	CNX REALTY	3887	(0.14)
Shanghai	3247	0.76	CNX AUTO	8885	1.05
Nikkei	18284	0.46	CNX ENERGY	8807	0.19
Strait Times	3436	0.58	CNX PHARMA	11741	0.52
Kospi	1961	0.16	Advances / Declines	BSE	NSE
Taiwan	9530	0.35	Advances	1640	892
FTSE	6898	0.00	Declines	1274	586
CAC	4799	0.95	Unchanged	114	65
DAX	10961	0.60	Total	3028	1543

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HDFC	1323.35	2.74
ACC	1658.40	2.72
HCLTECH	2038.00	2.68
TATAPOWER	86.10	2.38
TCS	2640.00	2.14

Nifty Losers		
Company	Price(Rs)	Chg(%)
HEROMOTOCO	2667.50	(4.90)
DLF	149.30	(3.99)
SSLT	204.40	(3.38)
ONGC	332.40	(2.36)
BHARTIARTL	353.00	(2.31)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
PAGEIND	0.25	0.0	28
SFCL	6.78	0.5	15
HEROMOTOCO	9.06	0.6	15
SAINTGOBAIN	21.60	1.5	14
CUMMINSIND	4.65	0.4	13

Indian Forex	Closing	Chg	% Chg
USD/INR	62.245	0.043	0.07
GBP/INR	95.571	(0.426)	(0.44)
EUR/INR	71.009	0.005	0.01
JPY/INR	52.320	(0.140)	(0.27)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26680	(509)
Silver (Rs/1kg)	36700	(1765)

Commodities	Price	% Chg.
Crude (US\$/BBL)	50.7	(4.74)
Brent (US\$/BBL)	59.6	(4.37)
Gold (US/oz)	1216.5	0.70
Silver (US\$/oz)	16.7	1.40
Copper (US\$/MT)	5690.0	0.43
Alum (US\$/MT)	1797.0	(0.19)
Zinc(US\$/MT)	2083.0	(1.05)

ADR	Cl. Values	% Chg.
ICICI Bank	11.56	(0.06)
HDFC Bank	58.50	(0.06)
Infosys	36.50	0.33
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	53.39	(0.47)
Wipro	13.79	(0.20)
Tata Motors	48.92	0.26

Market Sensor

US market closed mostly lower on Wednesday despite surprisingly dovish Fed minutes, amid apparent progress in the Greece-euro zone negotiations. Dow Jones Industrial Average was down 0.10% or 17.73 points at 18029.85. Nasdaq Composite was up 0.14% or 7.10 points at 4906.36. Standard & Poor's 500 was down 0.03% or 0.66 points at 2099.68.

Indian equity market got boosted on expectation of a growth oriented budget and on speculation that Greece and its euro-area creditors may reach a compromise agreement on its bailout. Nifty ended the previous trading session with a gain of 0.68% or 59.75 points at 8869.10. On Tuesday's trading session, FII's bought Rs.2187.96 Cr in cash market and bought net Rs.553.02 in derivative segment. Whereas, DII bought net Rs.327.87 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8830 followed by 8780 while resistance exist at 8900 and then at 8940.

Global News

❖The European Central Bank has reportedly agreed to raise the emergency funding available to Greek banks to €68.3bn (£50.3bn). The €3.3bn increase in the so-called Emergency Liquidity Assistance (ELA) is critical for Greece's banks. (BBC)

❖Unemployment has continued to fall in Britain, while wage growth outpaced inflation at the fastest rate in almost five years. The number out of work in the UK fell by 97,000 to 1.86 million in the three months to December. (BBC)

❖Officials at the Federal Reserve are unlikely to raise interest rates soon, the latest minutes from the bank's January meeting have revealed. Policymakers worried about lower-than-expected inflation as well as slow wage growth in the US economy, the world's largest. (BBC)

❖The rate of UK Consumer Prices Index inflation fell to 0.3% in January, its lowest level since records began. Cheaper petrol and lower food prices - helped by a supermarket price war - cut the rate from 0.5% in December, Office for National Statistics figures show. (BBC)

❖The US economy added 252,000 jobs in December, while the unemployment rate fell to 5.6% from 5.8%, according to Labor Department figures. (BBC)

Economic News

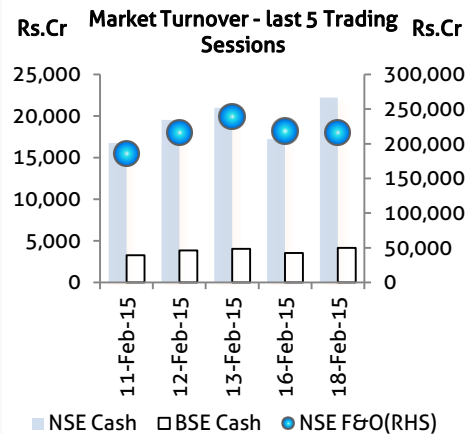
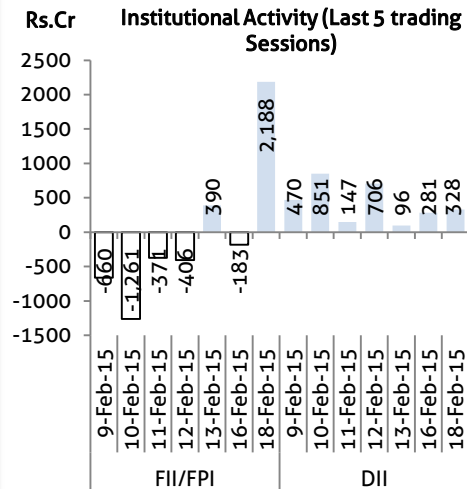
- ❖ In order to explain the design, rules and procedures of the upcoming spectrum auction, the Department of Telecom will hold a presentation on February 26 for all stakeholders. "A presentation is proposed to be held on February 26 on spectrum auction for various stakeholders and government officers to share with them the auction system and procedures," said a DoT official. (BS)
- ❖ Despite the dramatic recent weakening in global energy markets, ongoing economic expansion in Asia - particularly in China and India - will drive continued growth in the world's demand for energy over the next 20 years, says the new edition of the BP Energy Outlook 2035. Global demand for energy is expected to rise 37% from 2013 to 2035, or by an average of 1.4% a year, the outlook suggests. (BS)
- ❖ As government eyes major investments in infrastructure, Law Ministry has proposed to develop a panel of bodies to provide institutional arbitration and advise central departments and public enterprises on ways to include arbitration clause in their contracts. (BS)
- ❖ In January, general wholesale prices fell, but food became more expensive and at a faster pace than in December. It was primarily vegetables such as peas, tomato, cauliflower, cabbage, and brinjal, and pulses such as moong, masur and urad which drove up food prices for the second consecutive month. Overall, wholesale price index (WPI) inflation dipped to minus 0.39% in January, showing deflation on the yearly basis for the second time in three months. There was deflation at 0.17% per cent in November and inflation at 0.11% in December. (BS)
- ❖ Making a strong pitch to end India's dependence on defence imports, Prime Minister Narendra Modi promised a conducive environment for manufacturers, including a discrimination-free tax system, and asked foreign firms not to be just "sellers" but "strategic partners". (BS)
- ❖ Prime Minister Narendra Modi called upon Indian industry and armed forces to develop own capabilities in defence manufacturing and stop reliance on imports. "We dont just want to have assembly of imported equipment any more. We want transfer of technology here in India", Modi said. (BS)
- ❖ The plans of Narendra Modi-led NDA government to bring in a transparent, corruption-free system might take longer than expected, even on paper. In August 2014, all ministries and departments were instructed by the cabinet secretariat to prepare their 'Corruption Mitigation Action Plans' or CMAPs. But out of the 73 ministries and departments, only 32 had prepared and submitted these plans by February 1. (BS)

Domestic News

- ❖ State-run petroleum explorer Oil and Natural Gas Corporation (ONGC) said it has signed a Memorandum of Understanding with Super Wave Technology (SWTPL) for development of an alternative to hydraulic fracturing or fracking technology that is used to produce shale oil and gas. (BS)
- ❖ Telecom regulator Trai is believed to have issued show-cause notices to Airtel, Vodafone and Idea for not signing agreements with companies interested in providing international calling card services directly to consumers that could reduce ISD rates by up to 80%. (BS)
- ❖ New York based news and blogging portal Mashable has joined hands with Zee Entertainment Enterprises Limited (ZEEL) promoted India.com. The JV will launch an India specific variant called Mashable India. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1423	0.0026	0.23
GBP-USD	1.5455	0.0019	0.12
USD-JPY	118.53	(0.26)	(0.22)

Bond Markets	Closing	Chg
10-yr bond	7.71	0.50 bps
Interbank call	7.74	3.94 bps



Domestic News (Cont...)

❖ Supreme Court questioned some provisions of the 2013 Companies Act relating to setting up of National Company Law Tribunal (NCLT) and sent a batch of petitions challenging its constitutional validity to a larger bench. (BS)

❖ Boosting the prospects of Uttar Pradesh Chief Minister Akhilesh Yadav's promise of providing adequate power supply by 2016-17, NTPC Limited said it would supply an additional 1,657 megawatts (Mw) to the state in another two years. (BS)

❖ Coming down hard on cement makers for indulging in price "cartelisation" in roads and highways space, Union Minister Nitin Gadkari warned them against "exaggerated exploitation" in name of earning profits. (BS)

❖ Indian corporate bond issuance this year looks set to surpass 2013 and 2014 as expensive bank loans force companies seeking funding to try their luck in capital markets. So far, they haven't been disappointed. (BS)

❖ Carrying forward its trend of bidding aggressively, Power Grid Corporation of India (PGCIL) has put in aggressive bids for grabbing latest power transmission projects. (BS)

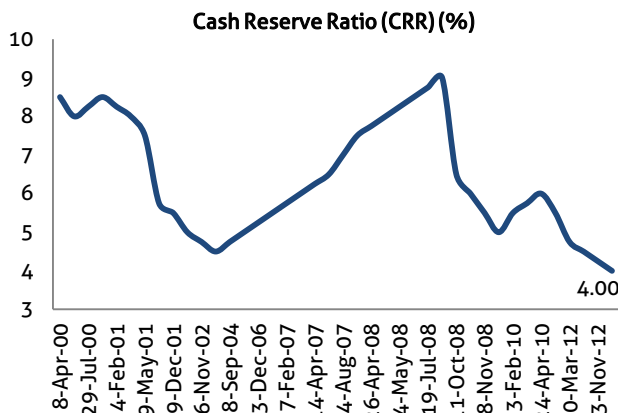
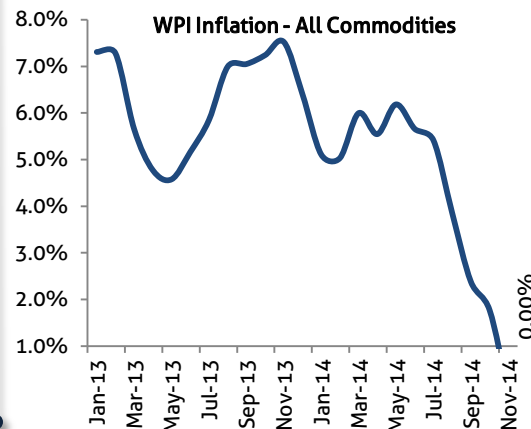
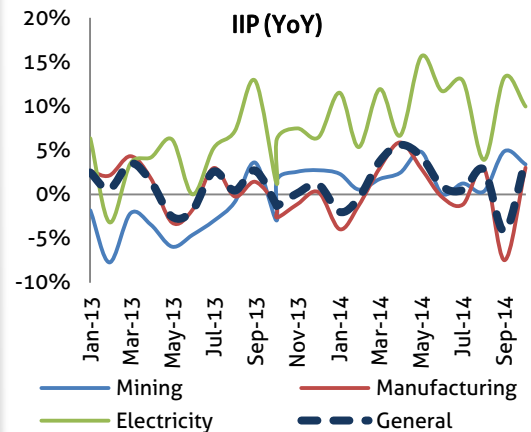
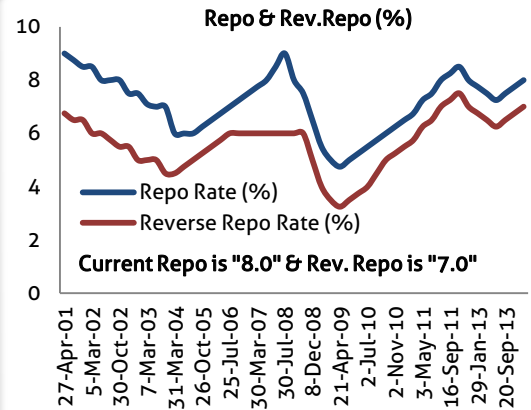
❖ International Finance Corporation (IFC) is planning to make an equity investment of Rs 120 crore in Delhi-based S Chand for a minority stake. The company is backed by Everstone Capital Partners II LLC. (BS)

❖ SpiceJet is yet to receive any funds from new investors under a revival plan led by Ajay Singh, a government official said on Wednesday. (BS)

❖ The Insurance Laws (Amendment) Ordinance, 2014, as promulgated by the President of India, had allowed foreign partners to hold up to 49% stake in a venture. (BS)

❖ Sundaram Finance has decided to buy out its UK partner RSA Group's 26% stake in its insurance venture Royal Sundaram Alliance Insurance for Rs 450 crore. The deal is subject to regulatory approvals. Sundaram Finance's holding will increase to 75.9% from the current 49.9% stake. Following the deal, Sundaram Finance and its associates will hold 100% in the company. (BS)

❖ ITC has acquired the trademarks for 'Savlon' and 'Shower To Shower' in India from Johnson & Johnson for an undisclosed amount. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
18-Feb-15	Hero MotoCorp Limited	BRIJ MOHAN LAL OM PARKASH	SELL	7000000	2664.9
18-Feb-15	Suzlon Energy Limited	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	20441781	26.3
18-Feb-15	Century Plyboards (India)	PREM KUMAR BHAJANKA	SELL	2000000	206.9
18-Feb-15	Star Ferro & Cement Ltd.	PREM KUMAR BHAJANKA	BUY	2568400	144.6
18-Feb-15	Manaksia Limited	SUBHAM AGARWAL	BUY	1100000	64.0

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
18-Feb-15	ECLERX	RELIANCE CAPITAL TRUSTEE CO. LTD. A/C EQ. OPPORTUNITIES FUND	B	500,000	1270.0
18-Feb-15	USHDI	NATASHA GUPTA	S	230,000	330.0
18-Feb-15	FCL	AVASHYAA INFOTECH PVT LTD	B	113,897	134.8
18-Feb-15	PONNIERODE	DHIREN SHEVANTILAL SHAH	S	53,607	228.1
18-Feb-15	INTENTECH-\$	PENGUIN PLANNING & DEVELOPM PVT LTD	S	140,000	63.8

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
535217	HPCBL	20-Feb-15	Stock Split from Rs.10/- to Re.1/-	23-Feb-15
506197	BLISSGVS	24-Feb-15	Interim Dividend - Rs.0.20	25-Feb-15
531344	CONCOR	24-Feb-15	Interim Dividend - Rs.8.00	25-Feb-15
522295	CONTROLPR-\$	24-Feb-15	Interim Dividend - Rs.2.00	25-Feb-15
522073	HITECHGEAR	24-Feb-15	Interim Dividend - Rs.1.00	25-Feb-15
524816	NATCOPHARM	24-Feb-15	Interim Dividend - Rs.5.00	25-Feb-15
520151	SHREYAS	24-Feb-15	Interim Dividend - Rs.0.70	25-Feb-15
511395	BALATECGL	25-Feb-15	Stock Split from Rs.10/- to Re.1/-	26-Feb-15
520008	RICOAUTO	25-Feb-15	Interim Dividend - Rs.1.00	26-Feb-15
523269	ADVANIHOTR	26-Feb-15	Interim Dividend - Rs.0.30	27-Feb-15
500039	BANCOINDIA	26-Feb-15	Interim Dividend - Rs.0.50	27-Feb-15

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
16-Feb-15	JPY	GDP (YoY) (Q4)		0.037	-0.019
16-Feb-15	CNY	FDI (Jan)			0.017
16-Feb-15	JPY	Industrial Production (MoM) (Dec)			0.01
16-Feb-15	EUR	Trade Balance (Dec)		20.5B	20.0B
17-Feb-15	GBP	CPI (YoY) (Jan)			0.005
17-Feb-15	GBP	RPI (YoY) (Jan)			0.016
17-Feb-15	USD	NY Empire State Manufacturing Index (Feb)		9	9.95
17-Feb-15	USD	NAHB Housing Market Index (Feb)		58	57
18-Feb-15	USD	TIC Net Long-Term Transactions (Dec)			33.5B
18-Feb-15	GBP	Claimant Count Change (Jan)			-29.7K
18-Feb-15	GBP	Unemployment Rate (Dec)			0.058
18-Feb-15	USD	MBA 30-Year Mortgage Rate			0.0384
18-Feb-15	USD	Building Permits (Jan)		1.060M	1.058M
18-Feb-15	USD	Housing Starts (Jan)		1.070M	1.089M
18-Feb-15	USD	PPI (MoM) (Jan)		-0.004	-0.003
18-Feb-15	USD	Industrial Production (MoM) (Jan)		0.003	-0.001
19-Feb-15	JPY	Trade Balance (Jan)		-1,691B	-661B
19-Feb-15	EUR	Current Account n.s.a. (Dec)			24.6B
19-Feb-15	USD	CB Leading Index (MoM) (Jan)		0.003	0.005
19-Feb-15	USD	Philadelphia Fed Manufacturing Index (Feb)		9	6.3
19-Feb-15	EUR	Consumer Confidence (Feb)		-7.5	-8.5
20-Feb-15	JPY	Manufacturing PMI (Feb)			52.2
20-Feb-15	EUR	Manufacturing PMI (Feb)		51.4	51
20-Feb-15	GBP	Retail Sales (MoM) (Jan)			0.004
20-Feb-15	USD	Manufacturing PMI (Feb)		54	53.9

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
16-Feb-15	INR	WPI Inflation (YoY) (Jan)		0.41%	0.11%
18-Feb-15	INR	M3 Money Supply (2wk)			11.20%
20-Feb-15	INR	Bank Loan Growth (2wk)			10.70%
20-Feb-15	INR	Deposit Growth (2wk)			11.60%

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