

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8895	0.30	CNX IT	12726	0.74
Sensex	29462	0.48	BANK NIFTY	19218	(0.41)
DowJones	17986	(0.24)	S&P CNX 500	7242	0.19
Nasdaq	4925	0.37	CNX FMCG	22012	(0.83)
Hangseng	24832	0.19	CNX REALTY	3833	(1.39)
Shanghai	3247	0.76	CNX AUTO	8889	0.05
Nikkei	18310	0.25	CNX ENERGY	8829	0.26
Strait Times	3436	0.58	CNX PHARMA	11707	(0.30)
Kospi	1961	0.16	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9530	0.35	Advances	1379	559
FTSE	6889	(0.13)	Declines	1508	632
CAC	4833	0.71	Unchanged	102	34
DAX	11002	0.37	Total	2989	1225

Nifty Gainers		
Company	Price(Rs)	Chg(%)
JINDALSTEL	199.80	28.61
SSLT	219.80	7.12
LT	1709.50	2.77
HINDALCO	155.70	2.67
M&M	1258.00	2.43

Nifty Losers		
Company	Price(Rs)	Chg(%)
GRASIM	3770.00	(2.52)
BANKBARODA	179.00	(2.29)
TECHM	2830.00	(2.15)
ACC	1619.00	(2.07)
AMBUJACEM	264.50	(2.07)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
KENNAMET	1.53	0.0	48
STCINDIA	2.70	0.1	20
HINDCOPPER	13.53	0.8	18
JINDALSTEL	108.10	7.3	15
PIIND	3.97	0.3	14

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)	26800	120
Silver (Rs/1kg)	36872	172

Commodities	Price	% Chg.
Crude (US\$/BBL)	51.5	1.60
Brent (US\$/BBL)	60.5	1.63
Gold (US/oz)	1208.9	(0.62)
Silver (US\$/oz)	16.5	(1.32)
Copper (US\$/MT)	5720.0	0.53
Alum (US\$/MT)	1802.0	0.28
Zinc(US\$/MT)	2073.0	(0.48)

ADR	Cl. Values	% Chg.
ICICI Bank	11.22	(0.34)
HDFC Bank	58.80	0.30
Infosys	37.20	0.70
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	54.09	0.70
Wipro	13.83	0.04
Tata Motors	49.22	0.30

## Market Sensor

US market closed narrowly mixed on Thursday after the S&P 500 touched a new intraday record, amid lower oil prices and Germany's rejection of a Greece loan extension plan. Dow Jones Industrial Average was down 0.24% or 44.08 points at 17895.77. Nasdaq Composite was up 0.37% or 18.34 points at 4924.70. Standard & Poor's 500 was down 0.11% or 2.23 points at 2097.45.

Indian equity market traded volatile in a broader range but managed to end in green with buying activity in IT majors alongside with recovery in metal and realty space. It seems that the Indian market is likely to be rangebound till Union Budget and might gain momentum post the outcome of the budget. Nifty ended the previous trading session with a gain of 0.30% or 26.20 points at 8895.30. On Thursday's trading session, FII's bought Rs.1542.7 Cr in cash market and sold net Rs.763.54 in derivative segment. Whereas, DII sold net Rs.195.74 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8840 followed by 8780 while resistance exist at 8940 and then at 8990.**

## Global News

❖Eurozone finance ministers are preparing for a key meeting to consider the proposal by Greece to extend its European loan programme. Friday's meeting in Brussels is the eurozone's third attempt to reach a deal to manage Greece's debt. (BBC)

❖Inflation in France, the eurozone's second-biggest economy, turned negative in January, adding to worries over deflation in the eurozone. Prices fell 0.4% from a year earlier, with energy costs down 7.1% following the drop in global oil prices. (BBC)

❖The ECB's chief economist warned central bankers from around the euro zone of the perils of delaying quantitative easy, according to records of a January meeting that shed light on how policy makers 'broadly' agreed to launch the scheme. (Reuters)

❖Swiss lawmakers plan to question the country's financial watchdog about HSBC's Swiss bank to determine whether parliament needs to take a more active role in investigation of a trove of details on alleged tax evasion by some of the bank's wealthy clients. (Reuters)

## Economic News

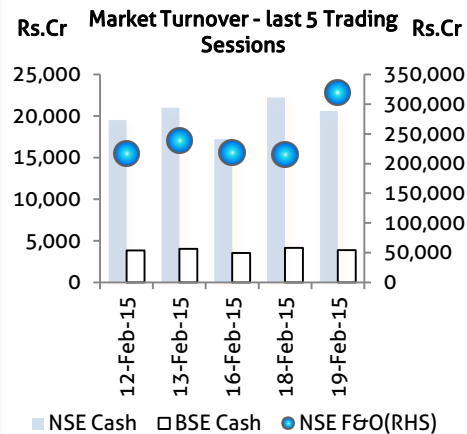
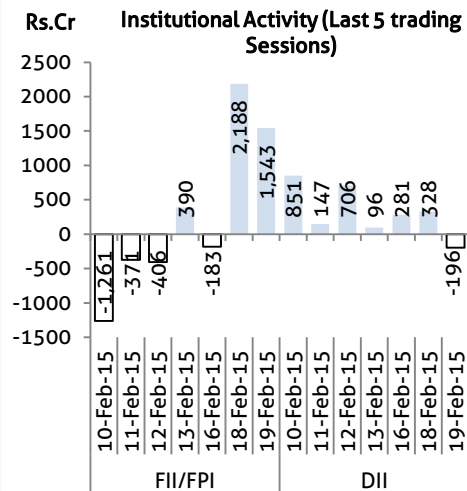
- ❖ Petroleum Minister Dharmendra Pradhan said strong action would be taken against the two employees of his ministry who were arrested by police for allegedly leaking confidential government documents to private companies. (BS)
- ❖ Federation of Indian Chambers of Commerce and Industry (FICCI) has suggested Finance Ministry to incentivise cashless transactions and introduce agriculture as few of the numerous measures in order to tackle black money. (BS)
- ❖ The Government of India is working on reviving the low cost drug store model Jan Aushadhi and plans are to source drugs from the small and medium pharma manufacturers for the proposed 3,000 stores, said Union Minister of States for Chemical and Fertilizer Hansraj Gangaram Ahir. (BS)
- ❖ By gearing up its plans to elevate Uttar Pradesh as a major tourist destination in the world, the state government is hosting UP Travel Mart 2015 from February 22. (BS)
- ❖ The rules and regulations for the auction of major minerals like iron ore and manganese ore will be finalised by May this year, Mines and Steel Minister Narendra Singh Tomar said here. "The rules and papers for mines auction will be readied by May. Then these will be sent to the states," Tomar said at an event organised by PHD Chamber of Commerce. (BS)
- ❖ The food ministry's opposition of the Shanta Kumar committee's suggestion is likely to rekindle the debate over subsidy burden. The committee, for reform of the Food Corporation of India (FCI), had recommended lowering of coverage under the food Act. (BS)
- ❖ Reserve Bank of India governor Raghuram Rajan cautioned "large rich countries" against turning their back on globalisation, while saying he was keen for India to start "setting the agenda" in policy debates with other countries. (BS)
- ❖ Confident of signing the much delayed \$10 billion contract for Rafale fighter jets with India 'soon', French Defence major Dassault said its pricing remains the same from day one and it has not wavered from the request for proposal (RPF). (BS)

## Domestic News

- ❖ Apollo Munich Health Insurance Company, a joint venture between Apollo Hospitals Group and Germany-based Munich Re's healthcare business Munich Health, is expecting its Gross Written Premium to cross Rs 1,000 crore next fiscal year. The company is entering into a bancassurance tie up with Indian Overseas Bank (IOB), anticipating access to the latter's 35,000 customers. (BS)
- ❖ Chennai-based Inasra Technologies Pvt Ltd, which runs hotel service Stayzilla.com, has raised \$20 million in a Series B funding from Nexus Capital and existing investor Matrix Partners. The company plans to use these funds to expand its footprint into new towns and cities and strengthen the 'alternate stay' market in India by bringing on board more options for home-stays, guesthouses and serviced apartments. (BS)
- ❖ Maheswar Sahu, IAS (Retd), has joined the Board of Directors of Reliance Industries Limited (RIL), as an Independent Director with immediate effect. With this, the Board will comprise 14 members, with eight being independent directors. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1369	0.0001	0.01
GBP-USD	1.5428	0.0014	0.09
USD-JPY	118.94	(0.01)	(0.01)

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



## Domestic News (Cont...)

❖ Videocon Telecom plans to invest Rs 1,200 crore over three years on launch of 4G services in three circles. The services will be launched in UP (E), UP (W) and Bihar across 29 cities, according to a company statement. (BS)

❖ Bharat Electronics Limited (BEL), the public sector defence undertaking based in Bengaluru, is set to commence mass production of Akash Missile System (AMS) for the Indian Army, a top company official said. (BS)

❖ The Central Electricity Regulatory Commission (CERC) proposes to include related party transactions in power exchanges as one of the terms of reference in its review of the power exchanges. (BS)

❖ Bengaluru-based Hindustan Aeronautics Limited (HAL) will soon set up a greenfield manufacturing facility in Tumakuru district of Karnataka to manufacture light utility helicopters (LUH), a top company official said. (BS)

❖ TeamLease Skill University, a Public Private Partnership with Gujarat government, announces a partnership with the Ministry of Labour & Employment to substantially expand the number of apprenticeships in the country. (BS)

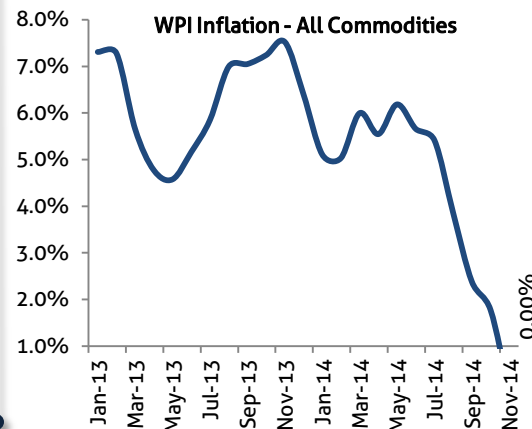
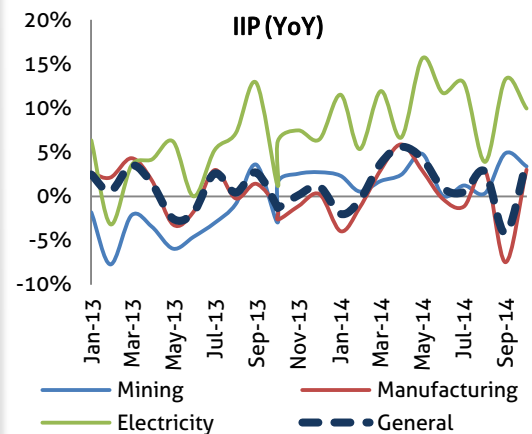
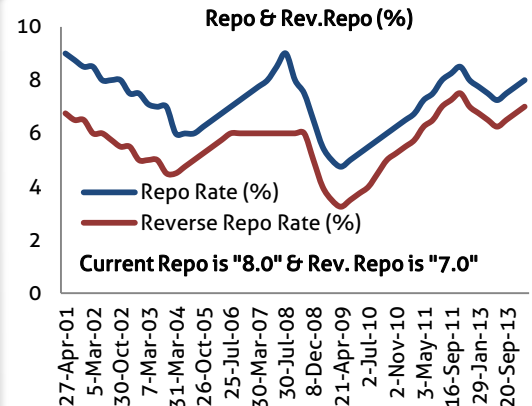
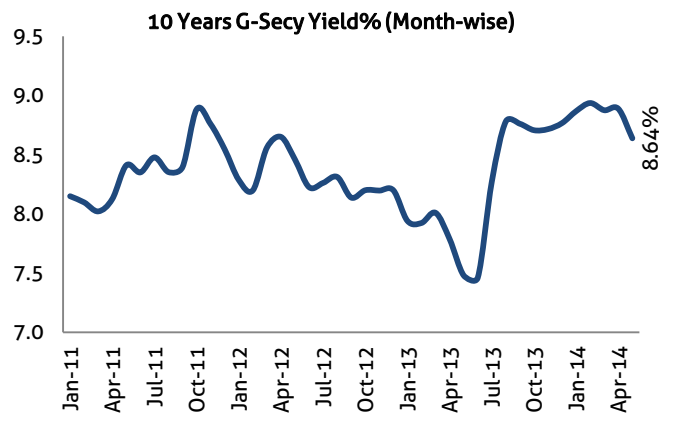
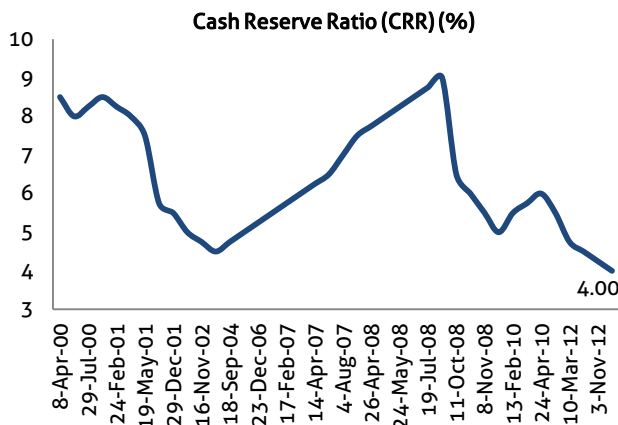
❖ Private lender IndusInd Bank said it will raise up to Rs 2,000 crore through issuance of long-term infrastructure bonds and subordinated non-convertible debentures/bonds on a private placement basis. (BS)

❖ Hyderabad-based Zen Technologies and US-headquartered communications and avionics firm Rockwell Collins on Thursday entered the Indian military flight simulation market by unveiling a next-generation rotary wing simulator at the ongoing Aero India 2015. (BS)

❖ India's Kalyani Group on Thursday announced a joint venture with Israel's Rafael Advanced Defence Systems Israel to develop and manufacture a wide range of technology and systems. (BS)

❖ KG Basin Isolated Wells Consumers Association (KGBICA), an association of gas-based small and medium industries, is opposing ONGC's proposal to re-auction isolated gas wells instead of extending the current gas supply agreements (GSAs). (BS)

❖ CBI filed its final probe report in a coal block allocation case allegedly involving former Coal Secretary P C Parakh, Hindalco and others before the special court which will consider it on March 11. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Feb-15	Hero MotoCorp Limited	BRIJ MOHAN LAL OM PARKASH	SELL	3546400	2664.0
19-Feb-15	Unitech Ltd	SW CAPITAL PRIVATE LIMITED	SELL	13467831	17.9
19-Feb-15	Titagarh Wagons Limited	HDFC MUTUAL FUND A/C HDFC PRUDENCE FUND	BUY	211000	535.6
19-Feb-15	Mirza International Ltd.	STRUM INFRA DEVELOPMENT PRIVATE LIMITED	SELL	633162	88.9
19-Feb-15	LML Ltd.	ANJALI CAPFIN PRIVATE LIMITED	SELL	900000	8.5

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Feb-15	MAXWELL	RELIANCE CAPITAL PARTNERS	S	1,500,000	49.0
19-Feb-15	ACGL-\$	WOODLAND RETAILS PRIVATE LIMITED	S	75,060	485.0
19-Feb-15	FRSHTRP	PANDIAN ILANGO VAN	B	76,000	187.8
19-Feb-15	GARNETINT	NAVKAR CORPORATION LIMITED	S	115,500	121.0
19-Feb-15	MITL	ELEVATOR BUILDERS PRIVATE LIMITED	B	657,194	19.0

## 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
535043	IDFCYDS3D	24-Feb-15	Temporary Suspension	25-Feb-15
535042	IDFCYDS3G	24-Feb-15	Temporary Suspension	25-Feb-15
535041	IDFCYRS3D	24-Feb-15	Temporary Suspension	25-Feb-15
535040	IDFCYRS3G	24-Feb-15	Temporary Suspension	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
537668	TFM460A	24-Feb-15	Dividend On Mutual Fund	25-Feb-15
537668	TFM460A	24-Feb-15	Redemption of Mutual Fund	25-Feb-15
537666	TFM460B	24-Feb-15	Redemption of Mutual Fund	25-Feb-15
537665	TFM460C	24-Feb-15	Dividend On Mutual Fund	25-Feb-15
537665	TFM460C	24-Feb-15	Redemption of Mutual Fund	25-Feb-15
537667	TFM460D	24-Feb-15	Redemption of Mutual Fund	25-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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