

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7541	(0.23)	CNX IT	9699	1.86
Sensex	25202	(0.18)	BANK NIFTY	15067	(1.01)
DowJones	16921	0.09	S&P CNX 500	6065	(0.33)
Nasdaq	4359	(0.08)	CNX FMCG	17833	0.38
Hangseng	23219	0.22	CNX REALTY	3730	(1.34)
Shanghai	2018	(0.31)	CNX AUTO	6659	0.24
Nikkei	15405	0.29	CNX ENERGY	9920	(2.51)
Strait Times	3266	(0.10)	CNX PHARMA	8119	0.90
Kospi	1971	(1.04)	Advances / Declines	BSE	NSE
Taiwan	9313	(0.04)	Advances	1406	648
FTSE	6808	0.44	Declines	1586	862
CAC	4563	0.72	Unchanged	93	46
DAX	10004	0.74	Total	3085	1556

Nifty Gainers		
Company	Price(Rs)	Chg(%)
INDUSINDBK	556.15	2.60
TCS	2280.15	2.38
INFY	3307.00	2.05
ASIANPAINT	568.10	1.83
SUNPHARMA	642.50	1.44

Nifty Losers		
Company	Price(Rs)	Chg(%)
MCDOWELL-N	2580.20	(7.93)
BPCL	562.25	(4.98)
ONGC	421.50	(4.79)
KOTAKBANK	922.15	(3.97)
MARUTI	2371.25	(2.62)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
D B CORP	36.14	0.1	328
SANOFI	0.58	0.1	9
PVR	0.95	0.2	6
HDFC	10.02	1.6	6
Max India	11.85	2.0	6

Indian Forex	Closing	Chg	% Chg
USD/INR	60.003	(0.121)	(0.20)
GBP/INR	102.047	0.047	0.05
EUR/INR	81.711	0.280	0.34
JPY/INR	58.940	0.130	0.22

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27500	(50)
Silver (Rs/1kg)	42600	123

Commodities	Price	% Chg.
Crude (US\$/BBL)	106.7	0.38
Brent (US\$/BBL)	114.9	0.56
Gold (US/oz)	1312.8	2.80
Silver (US\$/oz)	20.7	4.28
Copper (US\$/MT)	6730.5	(0.13)
Alum (US\$/MT)	1844.0	0.85
Zinc(US\$/MT)	2138.5	0.45

ADR	Cl. Values	% Chg.
ICICI Bank	49.58	(0.22)
HDFC Bank	47.12	(0.28)
Infosys	54.64	0.44
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	40.45	(0.08)
Wipro	11.64	0.05
Tata Motors	39.47	(0.06)

Market Sensor

US market on Thursday were little changed, with the S&P 500 again finishing at a record high, a day after Wall Street rallied on reassurances from the Federal Reserve that interest rates would remain low as the U.S. economy continues to recover. Dow Jones Industrial Average was up 0.09% or 14.84 points at 16921.46. Nasdaq Composite was down 0.08% or 3.51 points at 4359.33. Standard & Poor's 500 was up 0.13% or 2.50 points at 1959.48.

Indian Equity market ended on a negative note as crude oil climbed close to \$115/bbl with the escalating geopolitical tension in Iraq. Nifty ended the previous trading session with a decline of 0.23% or 17.50 points at 7540.70. On Thursday's trading session, FII sold net Rs.420.51 Cr in cash market and bought net Rs.1005.76 in derivative segment. Whereas, DII sold net Rs.117.81 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7490 followed by 7450 while resistance is seen at 7590 followed by 7635.

Global News

❖ Sales of new and existing homes in the U.S. will fall in 2014 for the first time in four years, the Mortgage Bankers Association said in a forecast. (Bloomberg)

❖ Fewer Americans are filing applications for unemployment benefits, consumer confidence is rising and manufacturing is picking up as the world's largest economy shows additional signs of strengthening. (Bloomberg)

❖ Bill Gross said Pacific Investment Management Co., manager of the world's biggest bond fund, has been betting that volatility across asset classes will remain very low, as gauges of price swings fall to their lowest levels on record. (Bloomberg)

❖ Chinese property trusts face record repayments next year as the real-estate market cools, fueling speculation among bond funds that more developers will collapse. (Bloomberg)

❖ Shorter-maturity government bonds are heading for their worst first half in six years as Britain prepares to become the first major economy to begin exiting emergency stimulus. (Bloomberg)

Economic News

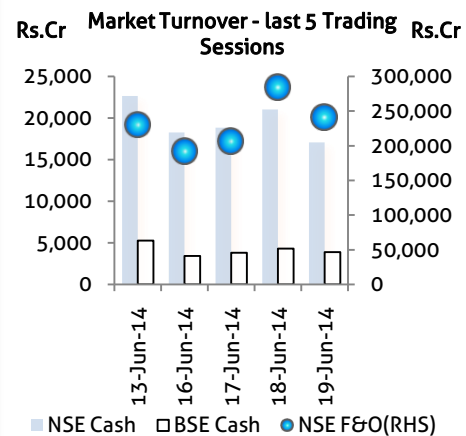
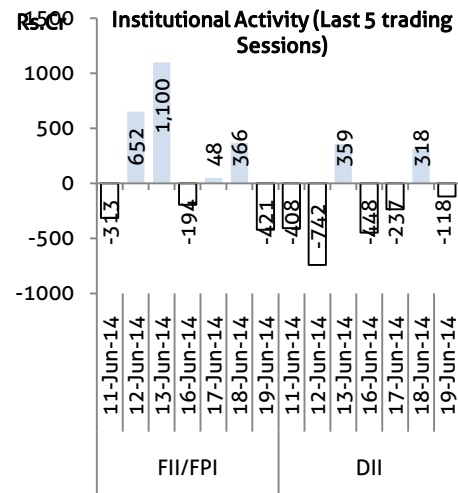
- ❖ Clearing environmental clearances and enhancing production seems to be key area of focus for the coal ministry rather than restructuring of Coal India Ltd at the moment. (BS)
- ❖ Tax Administration Reform Commission (TARC) has accepted the recommendation of the Bangalore Chamber of Industry and Commerce (BCIC) relating to realignment of the administration of CBDT and CBEC which will help move towards a more "unified management structure". (BS)
- ❖ An indication that a change in industrial scenario will take place in about six months' has been given by Mysore-Kodagu MP Pratap Simha in Mysore. (BS)
- ❖ The World Bank said it has approved funding of \$107 million (nearly Rs 650 crore) for a road project in Mizoram, connecting Myanmar and Bangladesh. (BS)
- ❖ Ahead of the Budget, direct-to-home (DTH) service providers have asked government to rationalise tax structure for the sector and reduce the licence fee. (BS)
- ❖ The government is considering to exempt the proposed mega manufacturing zones from certain restrictive labour laws with a view to boost industrial output which has stagnated for the past two years. (BS)
- ❖ Calling for major reforms in housing sector, top industry leader Deepak Parekh has said transparency and timely approvals from different authorities can reduce home prices by almost 20%. (BS)
- ❖ India plans to clear some pending oil payments to Iran through the United Arab Emirates central bank, three sources with knowledge of the matter said, under an interim nuclear deal that has allowed Tehran access to \$4.2 billion in blocked funds globally. (BS)
- ❖ The Department of Telecom is expected to finalise a National Broadband Policy within 100 days that would treat high-speed Internet access a basic right like education and health. (BS)
- ❖ A decision on hiking passenger fares and on allowing foreign direct investment in railways is likely to be taken before the Rail Budget, the government said. (BS)
- ❖ The government may well end up being amongst the biggest suppliers of paper in the capital markets over the next three years, with new regulations mandating higher public shareholding for even government-backed companies. (BS)
- ❖ Concerned over iron ore exports falling sharply to 14.42 million tonnes last fiscal, miners body FIMI has requested the Centre to do away with export duty to help the sector. (BS)

Domestic News

- ❖ Minister of Communications and IT Ravi Shankar Prasad met the senior management of BSNL and MTNL to discuss the blueprint for reviving the loss-making PSU telecom companies. (BS)
- ❖ The Chatterjee Group is finally set to takeover Haldia Petrochemicals Ltd and TCG chief Purnendu Chatterjee is likely to become the chairman of the beleaguered company soon. (BS)
- ❖ The Gujarat High Court on Thursday issued notices to Petroleum & Natural Gas Regulatory Board (PNGRB) and Adani Gas Limited over collection of additional security deposit from the latter's customers in Ahmedabad city. (BS)

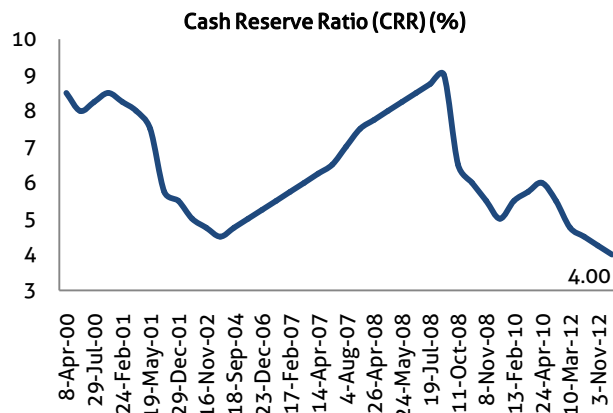
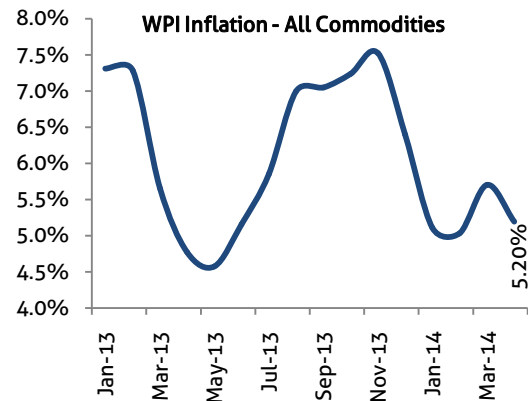
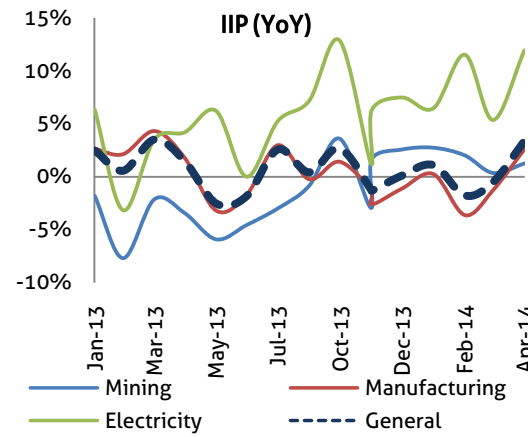
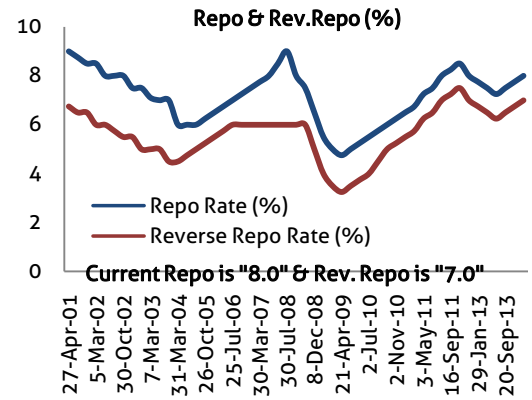
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3619	0.0011	0.08
GBP-USD	1.7047	0.0008	0.05
USD-JPY	101.80	(0.08)	(0.08)

Bond Markets	Closing	Chg
10-yr bond	8.70	1.3 bps
Interbank call	7.95	2.0 bps



Domestic News (Cont...)

- ❖ Bajaj Auto, India's second largest two-wheeler manufacturer, has said that it will begin retail sales of its four-wheeled passenger vehicle, popularly called as quadricycle, by October. (BS)
- ❖ Two wheeler manufacturer TVS Motor Company has launched a new motorcycle, StaR HLX 125, specially designed to suit riding conditions in African Continent. (BS)
- ❖ Popularity of phablets and regulatory hurdles impacted the overall tablet shipments in the first quarter of 2014. Tablet shipments for the first quarter of CY2014 at 746,463 saw a dip of 17.5% year-on-year. (BS)
- ❖ The GMR Group, which had to exit the Male airport project, said a tribunal has declared the Maldivian government and the nation's airport agency "jointly and severally liable in damages" to the company for loss caused by the wrongful repudiation of the agreement. (BS)
- ❖ GMR Infrastructure, the Bangalore-based infrastructure developer, has said that it has won the arbitration proceedings which it had initiated against the Government of Maldives (GoM), after the earlier Government in Maldives unilaterally cancelled the \$500 million contract given to GMR to upgrade and maintain the Male International Airport during late 2012. (BS)
- ❖ Tata Motors-owned Jaguar Land Rover has announced an investment of 200 million pounds at its Halewood plant in the UK to support introduction of its upcoming SUV Discovery Sport. (BS)
- ❖ Wind turbine maker Suzlon Energy has been given a go-ahead by the power generation firm CLP India to start manufacturing equipment for the latter's project in Rajasthan. (BS)
- ❖ Car market leader Maruti Suzuki India (MSI) has commissioned a solar power plant at its Manesar facility to harness renewable energy source in line with its policy of adopting Eco-friendly technologies. (BS)
- ❖ The Mumbai-based Cipla has collaborated with Hetero Drugsto launch a biosimilar version of 'Darbepoetin alfa' under the brand name 'Actorise'. The co-marketing deal offers Cipla a license to make the drug for Indian market. The product is indicated for the treatment of anaemia caused due to chronic kidney disease. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Jun-14	SKS Microfinance Ltd	WESTBRIDGE VENTURES II LLC	SELL	1482500	270.4
19-Jun-14	Pricol Limited	HDFC MUTUAL FUND	BUY	2540000	39.0
19-Jun-14	Navin Fluorine Internatio	SHAH RAKESH HASMUKHLAL	BUY	58191	615.9
19-Jun-14	Autoline Industries Limit	ARKAYA INVESTMENTS	BUY	141478	98.2
19-Jun-14	Navin Fluorine Internatio	SHAH RAKESH HASMUKHLAL	SELL	16999	639.1

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Jun-14	D B CORP	HDFCFACMIPLONGTERMPAN	B	3,072,000	303.0
19-Jun-14	Cosco India-\$	INDO WEBSEC LTD	S	149,000	52.5
19-Jun-14	IFL Promoters	HEENA RAMESHBHAI PATEL	S	1,371,299	5.6
19-Jun-14	Naisargik Agri	PARUL NILESH PANDYA	S	45,000	153.9
19-Jun-14	VMS Inds	MANJIT KUMAR TARA	S	100,000	36.2

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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	-
509945	Thacker & Co	24-Jun-14	Stock Split from Rs.5/- to Re.1/-	25-Jun-14
532505	Uco Bank	24-Jun-14	Final Dividend - Rs.1.00	-
522275	Alstom T&D	25-Jun-14	Dividend - Rs.1.80	-
513353	Cochin Mnrl-\$	25-Jun-14	Dividend - Rs.1.00	-
523405	JM Financial-\$	25-Jun-14	Final Dividend - Rs.0.55	-
533289	Kesar Terminals	25-Jun-14	Final Dividend - Rs.1.50	-
511218	Shriram Trans	25-Jun-14	Final Dividend - Rs.4.00	-
506105	Stanrose Mafat	25-Jun-14	Dividend - Rs.6.00	-
532051	SWELECT-\$	25-Jun-14	Final Dividend - Rs.9.00	-
504387	ELF Trading	26-Jun-14	Final Dividend - Rs.2.00	-
517354	Havells India	26-Jun-14	Final Dividend - Rs.10.00	-
500116	IDBI Bank	26-Jun-14	Final Dividend - Rs.0.28	-
500304	NIIT	26-Jun-14	Dividend - Rs.1.60	-
532541	NIIT Tech	26-Jun-14	Dividend - Rs.9.00	-

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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