

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6091	(1.00)	CNX IT	9972	(0.61)
Sensex	20537	(0.90)	BANK NIFTY	10428	(1.71)
DowJones	16133	0.58	S&P CNX 500	4716	(0.77)
Nasdaq	4268	0.70	CNX FMCG	16336	(1.00)
Hangseng	22531	0.61	CNX REALTY	155	(0.19)
Shanghai	2127	(0.54)	CNX AUTO	5260	(0.30)
Nikkei	14740	2.01	CNX ENERGY	7435	(0.76)
Strait Times	3105	0.60	CNX PHARMA	7901	0.17
Kospi	1951	1.04	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8593	0.81	Advances	1180	554
FTSE	6813	0.24	Declines	1492	844
CAC	4355	0.33	Unchanged	148	88
DAX	9619	(0.43)	Total	2820	1486

Nifty Gainers		
Company	Price(Rs)	Chg(%)
JPASSOCIAT	41.45	5.47
DRREDDY	2718.50	1.88
BAJAJ-AUTO	1849.00	1.54
TATAPOWER	78.50	1.42
LT	1036.50	0.50

Nifty Losers		
Company	Price(Rs)	Chg(%)
BANKBARODA	513.05	(3.47)
KOTAKBANK	669.20	(2.43)
GRASIM	2427.00	(2.24)
INDUSINDBK	384.45	(2.15)
ICICIBANK	1009.00	(2.12)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Bayer Crop	1.35	0.01	184
Tata Sponge	7.81	0.28	27
Indian Hotels	13.68	0.57	24
J&K Bank	0.51	0.03	15
NIIT Tech	1.41	0.16	9

Indian Forex	Closing	Chg	% Chg
USD/INR	62.284	0.162	0.26
GBP/INR	103.840	(0.090)	(0.09)
EUR/INR	85.700	0.531	0.62
JPY/INR	61.170	0.660	1.09

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30500	100
Silver (Rs/1kg)	47330	(71)

Commodities	Price	% Chg.
Crude (US\$/BBL)	102.7	(0.43)
Brent (US\$/BBL)	110.3	0.21
Gold (US/oz)	1320.1	0.77
Silver (US\$/oz)	21.7	0.88
Copper (US\$/MT)	7185.0	(0.48)
Alum (US\$/MT)	1717.5	(0.52)
Zinc(US\$/MT)	2035.0	(1.93)

ADR	Cl. Values	% Chg.
ICICI Bank	34.15	0.35
HDFC Bank	33.30	(0.07)
Infosys	60.84	0.92
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	43.88	1.20
Wipro	13.11	0.09
Tata Motors	32.30	0.48

## Market Sensor

US market drifted higher to close at session highs Thursday, with the S&P nearing its all-time high, as investors seemed to shrug off a mixed bag of economic and earnings reports. Dow Jones Industrial Average was up 0.58% or 92.67 points at 16133.23. Nasdaq Composite was up 0.70% or 29.59 points at 4267.55. Standard & Poor's 500 was up 0.60% or 11.03 points at 1839.78.

Indian equity market witnessed profit booking activity and ended steeply lower. Nifty ended the previous trading session with a decline of 1.00% or 61.30 points at 6091.45. On Thursday's trading session, FII bought net Rs.206.46 Cr in cash market and sold net Rs.653.52 in derivative segment. Whereas, DII sold net Rs.600.71 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile with crucial intraday support in Nifty exists at 6080 followed by 6050 while resistance is seen at 6130 followed by 6190.**

## Global News

❖ Japan's record trade deficit adds to sinking consumer confidence and an April sales-tax increase, threatening to undermine Prime Minister Shinzo Abe's bid to engineer a sustained recovery. (Bloomberg)

❖ A Chinese manufacturing slowdown fueled speculation that President Xi Jinping's officials will switch focus in coming months from taming credit growth and financial risks to supporting economic expansion. (Bloomberg)

❖ Global finance chiefs will use weekend talks to recommend monetary policy is carefully calibrated and clearly communicated as they try to settle a spat between the U.S. and emerging markets over the wind-down of Federal Reserve stimulus. (Bloomberg)

❖ Fewer Americans filed applications for unemployment benefits last week, a sign employers are holding the line on firings even as cold weather slowed industries from manufacturing to housing. (Bloomberg)

❖ The euro-region recovery showed signs of cooling this month, with weaker-than-forecast manufacturing and services keeping pressure on the European Central Bank to loosen policy. (Bloomberg)

## Economic News

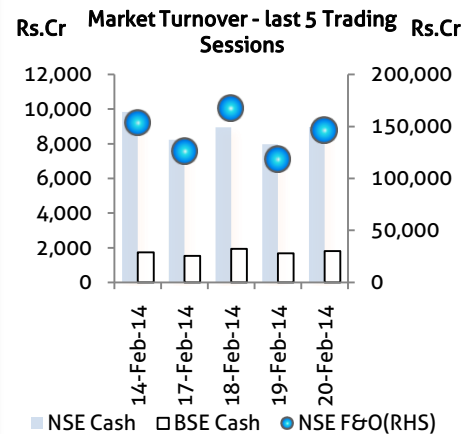
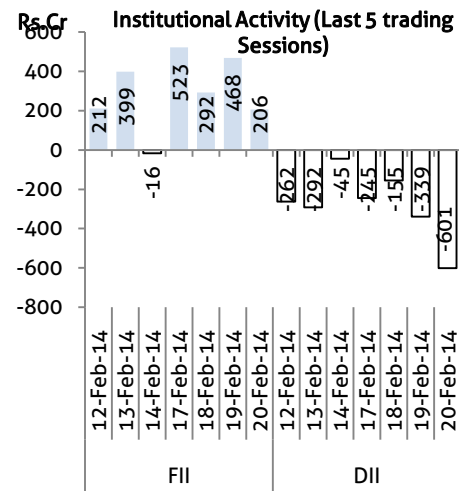
- ❖ The ministry of small, micro and medium enterprises (MSME) has decided to continue with its scheme of development of small and medium enterprises (SME) through incubators in the twelfth five year plan. (BS)
- ❖ The union cabinet gave its go-ahead for setting up an independent coal regulator to infuse transparency and efficiency in the coal sector. The approval came after seven years, two cabinet meetings and five sittings of a 12-member Group of Ministers (GoM) headed by Finance Minister P Chidambaram. (BS)
- ❖ India has recorded an average annual economic growth rate of 8% during the 11th Five Year Plan (2007-12) compared to targeted 9%, Parliament was informed. (BS)
- ❖ The Inter-Ministerial Group which is meeting next week will not immediately take a call on deallocation of 10 mines but will give one last chance to companies like JSPL, Tata Steel and JSW Steel which are yet to obtain forest clearances to seek green nod within a given time frame. (BS)
- ❖ The government deferred a decision on supply of coal to some thermal power projects with tapering linkages beyond the three-year period. (BS)
- ❖ Amid the recent spate of de-allocation of coal blocks, PFC Consulting Ltd (PFCCL), a fully-owned subsidiary of Power Finance Corporation (PFC), has invited bids to select a consultant for developing coal blocks allocated for the Bhedabahal ultra mega power project (UMPP) in Odisha. (BS)
- ❖ The government decided to convert 7,200 kms of states roads into national highways. (BS)
- ❖ The hearing in the additional spectrum case, in which Bharti Cellular CMD Sunil Mittal, Essar Group promoter Ravi Ruia and others have been summoned as accused, was fixed for April 4 by a Delhi court. (BS)

## Domestic News

- ❖ Once a major market for the Surat-based synthetic textile industry, the state split of Andhra Pradesh (AP) has brought down sales to the southern state by almost 70 per cent. (BS)
- ❖ United Bank of India (UBI), which markets itself as 'the bank that begins with U', has taken a U-turn a day after it blamed deficiencies in Infosys' Finacle software for failing to identify non-performing assets (NPAs) in its small loan accounts. (BS)
- ❖ Thomas Cook India has registered a growth of 36 per cent its net profit at Rs 68.7 crore for the year ending December 2013 compared to last year. The company's income from operations increased by 201 per cent to Rs 1,296 crore in in 2013, compared to Rs 430 crore in 2012. (BS)
- ❖ Power Finance Corp and Rural Electrification Corp have disbursed transitional loans worth Rs 33,694 crore to state-owned power distribution companies, the government said. (BS)
- ❖ The telecom regulatory authority of India has issued recommendation on migration to phase III for private radio broadcasters in the country and said that the permission period for existing operators who migrate to Phase III be raised to 15 years from the existing 10 years. (BS)

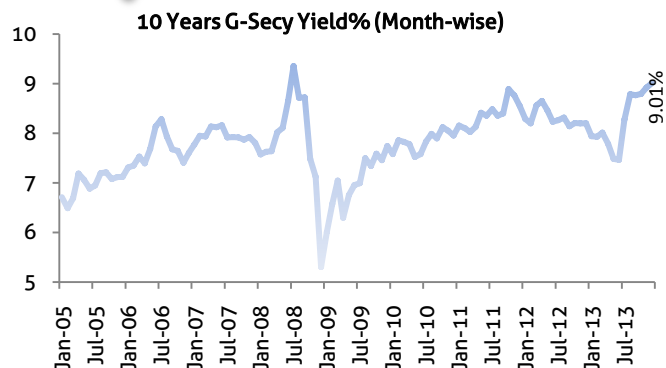
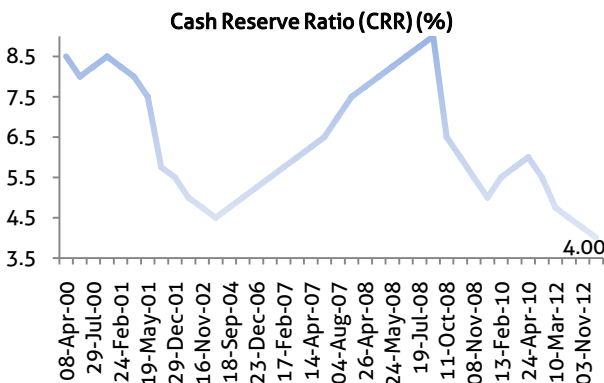
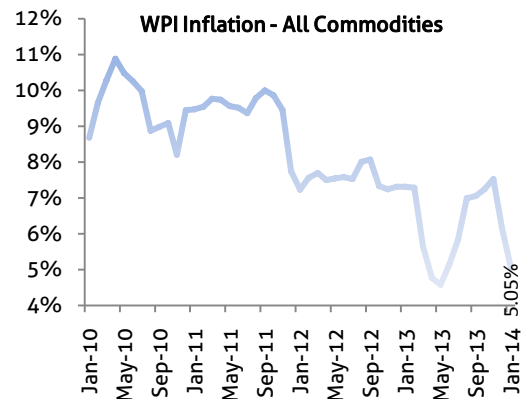
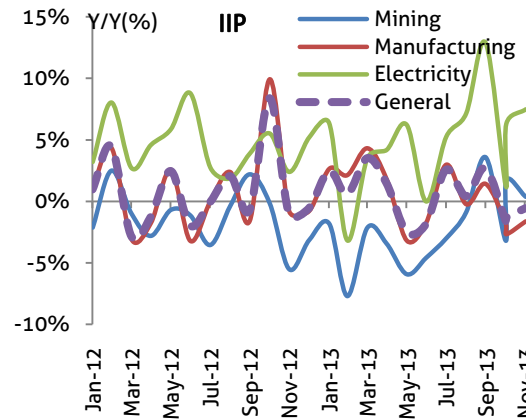
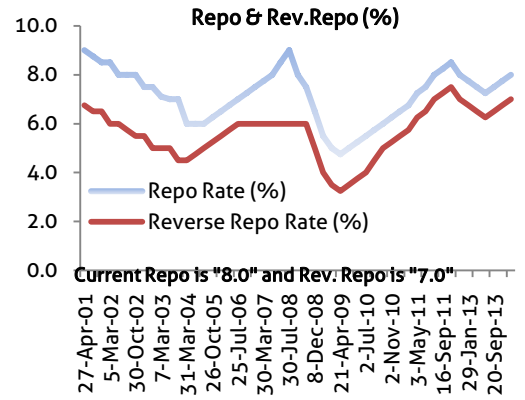
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3719	0.0000	0.00
GBP-USD	1.6661	0.0010	0.06
USD-JPY	102.41	0.13	0.13

Bond Markets	Closing	Chg
10-yr bond	9.07	0.6 bps
Interbank call	7.89	-41.0 bps



## Domestic News (Cont...)

- ❖ India Infoline Housing Finance Ltd (IIHFL) is planning to garner up to Rs 200 crore through non-convertible debentures to support its financing activities. (BS)
- ❖ The Securities Appellate Tribunal has upheld Sebi's Rs 10 lakh penalty on Keynote Corporate Services in a matter related to regulatory violations in Initial Public Offering (IPO) of Edserv Softsystems in 2009. (BS)
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- ❖ Jubilant Biosys, an arm of Jubilant Life Sciences, announced expansion of its drug discovery alliance with Janssen Pharmaceutica NV into multiple therapeutic areas. (BS)
- ❖ Drug majors Cipla and MSD announced an India specific strategic partnership under which the former will have a non-exclusive license to market, promote and distribute MSD's 'raltegravir' 400 mg tablet, an HIV drug, under a different brand name, in the country. (BS)
- ❖ The government cleared Rs 6,400 crore FDI proposal of global healthcare company GlaxoSmithKline to acquire additional 24.33% stake in its India arm. (BS)
- ❖ The government approved the proposal for acquisition of Prizm Payment Services by Japanese firm Hitachi, a move that would result in foreign investment of around Rs 1,540 crore. (BS)
- ❖ Government announced a financial package of about Rs 77.4 crore for the state-run HMT Limited and its subsidiary HMT Machine tools Ltd to make payments of salary, wages and statutory dues such as PF and gratuity to its employees. (BS)
- ❖ Diageo, the leading premium player in the drinks business, has selected Tata Consultancy Services (TCS), as its new global IT provider. The financial details of the details have not been disclosed. (BS)
- ❖ Facebook's decision to buy messaging service WhatsApp for \$19 billion (Rs.1.18 lakh crore), makes the 'early stage' tech company from Silicon Valley more valuable than 99% of India's listed companies. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Feb-14	Financial Technologies (I	SVS SECURITIES PVT. LTD.	SELL	239736	338.48
20-Feb-14	Financial Technologies (I	SVS SECURITIES PVT. LTD.	BUY	237936	340.06
20-Feb-14	Tata Sponge Iron Ltd.	CROSSEAS CAPITAL SERVICES PVT. LTD.	BUY	84534	415.65
20-Feb-14	Tata Sponge Iron Ltd.	CROSSEAS CAPITAL SERVICES PVT. LTD.	SELL	84584	415.02
20-Feb-14	Southern Ispat Ltd	LILAC FARMS PRIVATE LIMITED	SELL	1630136	2.05

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Feb-14	Tata Sponge	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	S	85,234	416.5
20-Feb-14	Tata Sponge	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	85,234	415.54
20-Feb-14	Intellivate Cap	OLUMPUS CONSTRUCTION PRIVATE LIMITED	B	364,100	85.47
20-Feb-14	Intellivate Cap	HAWCOPLAST INVESTMENT & TRADING LIMITED	S	264,000	86.5
20-Feb-14	Alliance Integrat	ALLIANCE INTEGRATED METALIKS LIMITED	B	136,500	160

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
533229	Bajaj Corp	20-Feb-14	Interim Dividend - Rs.6.50	21-Feb-14
500039	Banco Products-\$	20-Feb-14	Interim Dividend - Rs.1.70	21-Feb-14
526881	Financial Tech	20-Feb-14	3rd Interim Dividend - Rs.2.00	21-Feb-14
532129	Hexaware Tech	20-Feb-14	Interim Dividend - Rs.7.50	21-Feb-14
532955	REC	20-Feb-14	Interim Dividend - Rs.7.75	21-Feb-14
532908	Sharon Bio-\$	20-Feb-14	BONUS 1:1	21-Feb-14
532908	Sharon Bio-\$	20-Feb-14	Stock Split from Rs.10/- to Rs.2/-	21-Feb-14
533289	Kesar Terminals	21-Feb-14	Interim Dividend - Rs.1.50	24-Feb-14
512381	Nivedita Merc	21-Feb-14	Interim Dividend - Rs.0.50	24-Feb-14
523642	PI Inds	21-Feb-14	Interim Dividend - Rs.0.50	24-Feb-14
503162	Reliance Chem-\$	21-Feb-14	Interim Dividend - Rs.0.75	24-Feb-14
506414	DIL	24-Feb-14	Interim Dividend - Rs.7.50	25-Feb-14
532859	Hinduja Glob	24-Feb-14	2nd Interim Dividend - Rs.5.00	25-Feb-14
524816	Natco Pharma	24-Feb-14	Interim Dividend - Rs.5.00	25-Feb-14
531717	Vidhi Dyestuffs-\$	24-Feb-14	Interim Dividend - Rs.0.20	25-Feb-14
522073	Hitech Gears	25-Feb-14	Interim Dividend - Rs.1.00	26-Feb-14
517380	Igarashi Motors	25-Feb-14	Interim Dividend - Rs.1.00	26-Feb-14
533154	INFINITE	25-Feb-14	Interim Dividend - Rs.2.00	27-Feb-14
532440	MPS	25-Feb-14	3rd Interim Dividend - Rs.7.00	26-Feb-14
532468	KAMAHOLDING-\$	26-Feb-14	2nd Interim Dividend - Rs.-	28-Feb-14
532899	Kaveri Seed	26-Feb-14	Interim Dividend - Rs.2.40	28-Feb-14
523539	Precision Wires	26-Feb-14	2nd Interim Dividend - Rs.4.00	28-Feb-14

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
17-Feb-14	JPY	GDP (YoY)		2.80%	1.10%
17-Feb-14	JPY	Industrial Production (MoM)			1.10%
18-Feb-14	EUR	Current Account n.s.a.		20.0B	27.4B
18-Feb-14	GBP	CPI (YoY)		2.00%	2.00%
18-Feb-14	GBP	PPI Input (YoY)		-2.90%	-1.20%
18-Feb-14	GBP	PPI Output (YoY)		0.80%	1.00%
18-Feb-14	GBP	RPI (YoY)		2.70%	2.70%
18-Feb-14	USD	NY Empire State Manufacturing Index		10	12.51
18-Feb-14	USD	TIC Net Long-Term Transactions			-29.3B
19-Feb-14	GBP	Claimant Count Change		-20.0K	-24.0K
19-Feb-14	GBP	Unemployment Rate		7.10%	7.10%
19-Feb-14	USD	Jobless Claims Change			
19-Feb-14	USD	MBA 30-Year Mortgage Rate			4.45%
19-Feb-14	USD	Building Permits (MoM)			-2.60%
19-Feb-14	USD	Housing Starts (MoM)			-9.80%
19-Feb-14	USD	PPI (YoY)		1.20%	1.20%
20-Feb-14	JPY	Trade Balance		-2,489B	-1,302B
20-Feb-14	CNY	Chinese HSBC Manufacturing PMI			49.5
20-Feb-14	EUR	Manufacturing PMI		54	54
20-Feb-14	EUR	Services PMI		51.9	51.6
20-Feb-14	GBP	Retail Sales (YoY)		5.00%	5.30%
20-Feb-14	USD	Initial Jobless Claims			
20-Feb-14	USD	CPI (YoY)		1.50%	1.50%
20-Feb-14	USD	Manufacturing PMI			53.7
20-Feb-14	USD	CB Leading Index (MoM)		0.20%	0.10%
20-Feb-14	USD	Philadelphia Fed Manufacturing Index		10	9.4
21-Feb-14	EUR	Trade Balance		14.5B	16.0B
21-Feb-14	USD	Existing Home Sales		4.70M	4.87M

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
19-Feb-14	INR	Indian M3 Money Supply			14.50%
21-Feb-14	INR	Indian Bank Loan Growth			14.70%

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