

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6483	(0.63)	CNX IT	9314	1.69
Sensex	21740	(0.42)	BANK NIFTY	12017	(1.39)
DowJones	16331	0.67	S&P CNX 500	5015	(0.58)
Nasdaq	4319	0.27	CNX FMCG	17888	(0.32)
Hangseng	21247	0.31	CNX REALTY	172	(2.63)
Shanghai	1997	0.20	CNX AUTO	5494	(0.85)
Nikkei	14224	(1.65)	CNX ENERGY	8049	(0.40)
Strait Times	3070	0.43	CNX PHARMA	7821	0.17
Kospi	1931	0.60	Advances / Declines	BSE	NSE
Taiwan	8605	0.09	Advances	1269	581
FTSE	6542	(0.47)	Declines	1534	877
CAC	4328	0.46	Unchanged	137	82
DAX	9296	0.21	Total	2940	1540

Nifty Gainers		
Company	Price(Rs)	Chg(%)
TCS	2107.00	3.31
HINDUNILVR	573.00	2.03
CIPLA	387.80	1.31
WIPRO	552.00	1.27
SUNPHARMA	591.00	0.97

Nifty Losers		
Company	Price(Rs)	Chg(%)
DLF	167.15	(3.91)
BPCL	430.70	(3.90)
AMBUJACEM	182.60	(3.64)
JPASSOCIAT	47.00	(3.09)
POWERGRID	99.20	(3.03)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Excel Crop	4.19	0.02	230
EID Parry	16.24	0.38	43
Eclerx Serv	0.82	0.03	28
Glaxosmithkl Phar	3.10	0.12	27
Sandur Mang	2.47	0.14	18

Indian Forex	Closing	Chg	% Chg
USD/INR	61.131	0.034	0.06
GBP/INR	101.172	(0.243)	(0.24)
EUR/INR	84.593	(0.487)	(0.57)
JPY/INR	59.760	(0.420)	(0.70)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29796	(322)
Silver (Rs/1kg)	44850	(651)

Commodities	Price	% Chg.
Crude (US\$/BBL)	98.4	(2.05)
Brent (US\$/BBL)	106.1	(0.05)
Gold (US/oz)	1332.8	0.14
Silver (US\$/oz)	20.4	(1.59)
Copper (US\$/MT)	6434.5	(0.18)
Alum (US\$/MT)	1674.0	0.12
Zinc(US\$/MT)	1957.0	(0.03)

ADR	Cl. Values	% Chg.
ICICI Bank	41.83	(0.54)
HDFC Bank	38.37	0.00
Infosys	54.62	0.78
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	45.63	(0.33)
Wipro	13.05	(0.01)
Tata Motors	33.00	0.40

Market Sensor

US market climbed on Thursday, recovering much of the prior day's losses, as reports on U.S. leading indicators and regional manufacturing spurred optimism the nation's economy would strengthen after first-quarter weakness, helping offset concerns that interest rates could climb quicker than had been anticipated. Dow Jones Industrial Average was up 0.67% or 108.88 points at 16331.05. Nasdaq Composite was up 0.27% or 11.68 points at 4319.29. Standard & Poor's 500 was up 0.60% or 11.24 points at 1872.01.

Indian equity market closed lower as the global sentiment was down and Asian market also turned weak as a feeble signal came from the new Fed Chairman that monetary tightening may start sometime earlier than thought. Nifty ended the previous trading session with a decline of 0.63% or 40.95 points at 6483.10. On Thursday's trading session, FIIs bought net Rs.722.02 Cr in cash market and sold net Rs.848.01 in derivative segment. Whereas, DII sold net Rs.563.29 Cr in cash segment.

Coming to today's trade day Nifty to remain volatile with crucial intraday support exists at 6460 followed by 6420 while resistance is seen at 6560 followed by 6590.

Global News

❖ China's economy slowed this quarter, with industries including retail and mining showing weaker revenue growth while loans through non-traditional channels became more expensive, according to a private survey. (Bloomberg)

❖ Fewer Americans are seeking jobless benefits in March, manufacturing in some areas is rebounding and a gauge of the economy's prospects climbed more than forecast in February, signs U.S. growth will pick up as temperatures warm. (Bloomberg)

❖ European Union lawmakers struck a deal on legislation to create a single agency to handle failing euro-area banks after an all-night negotiating marathon ahead of a summit of EU leaders starting in Brussels. (Bloomberg)

❖ President Barack Obama's plans to confront Russian aggression and aid Ukraine are complicated by a domestic roadblock: House Republicans wary of bailouts and suspicious of empowering the International Monetary Fund. (Bloomberg)

Economic News

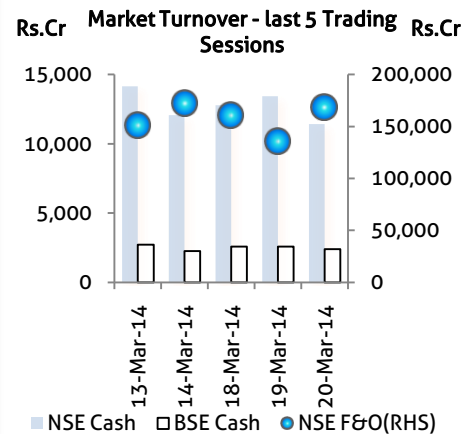
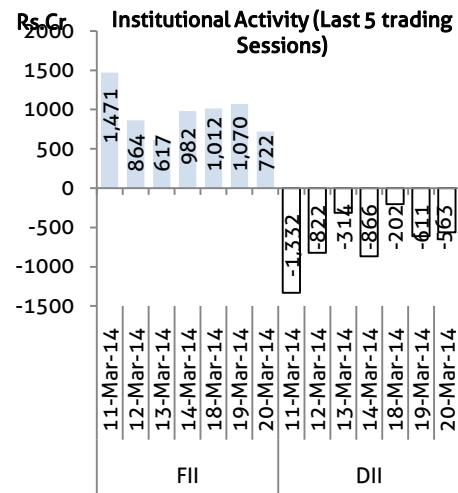
- ❖ To strengthen the urban transport system, the country needs to invest around \$140 billion by FY'30, according to a Barclays report. (BS)
- ❖ The government of Maharashtra will revise the norms for use of sugar cane purchase tax exemption for the year 2013-14 by sugar factories that are also engaged in co-generation of power plants. (BS)
- ❖ The Corporate Affairs Ministry is seeking Election Commission's nod to notify many sections of the new companies law which will be operational from April 1. (BS)
- ❖ While the hullabaloo over allowing or banning foreign direct investment (FDI) in multi-brand retail trading (MBRT) is keeping every political party on toes before the upcoming Lok Sabha elections, foreign multi-brand retailers seem to be avoiding India, at least for now. (BS)
- ❖ The Cabinet Committee on Economic Affairs (CCEA) approved Rs 458.56 crore support for setting up 2.92 lakh tonnes of foodgrains storage capacity in the north eastern region during the 12th Five Year Plan. (BS)
- ❖ Foreign direct investment (FDI) into India grew by a meagre 1.5% to \$2.18 billion in January, according to the data by the Department of Industrial Policy and Promotion. (BS)
- ❖ Riding on a good investor response being generated for the Rs 3,000 crore CPSE Exchange Traded Fund (ETF) the Government of India is expected to achieve the revised disinvestment target of Rs 16,000 crore with the closure of the new fund offer tomorrow.
- ❖ Gold jewellery exports from India edged higher by 1% in February to \$718.36 million from a year earlier, an industry body statement said on Thursday.
- ❖ India might suspend exports of wheat even without achieving the scheduled target of 2 million tonnes due to fears of crop damage from the recent hailstorms across the country.
- ❖ After topping the growth chart, economic growth in Gujarat is now slipping in line with economic slowdown in India. In the last five years Gujarat GDP growth slowed down to 8% in FY13 from 11% in FY08 and 11.2% in FY11.
- ❖ The Reserve Bank of India (RBI) has announced a host of liquidity boosting measures. RBI will infuse liquidity for an amount of about Rs 40,000 crore on Friday through 14 day term repo variable rate auction.

Domestic News

- ❖ Recent manufacturing problems in India suggest some makers of generic drugs will struggle to compete in the face of a rising quality bar, pointing to a likely shake-out in the low-cost sector, according to Novartis. (BS)
- ❖ Losses to be borne by Indian Oil Corporation (IOC) and other retailers of diesel, kerosene and cooking gas may quadruple to Rs 3,700 crore in this financial year as the finance ministry is unwilling to provide additional subsidy. (BS)
- ❖ State-owned Canara Bank said it plans to raise Rs 1,000 crore from bonds to fund business growth. (BS)
- ❖ The government ordered deduction of Rs 2.24 crore from bank guarantee given by Andhra Pradesh Mineral Development Corporation for delay in developing a coal mine in Madhya Pradesh. (BS)

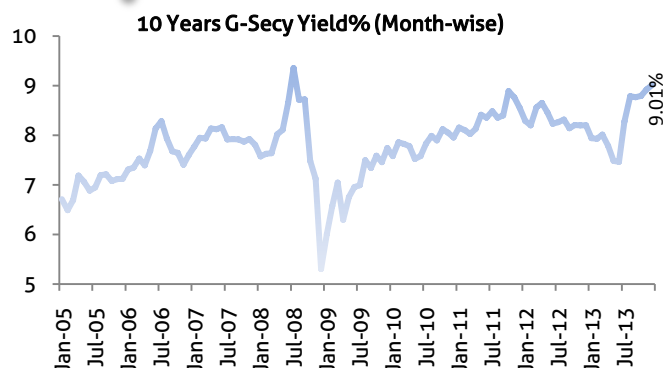
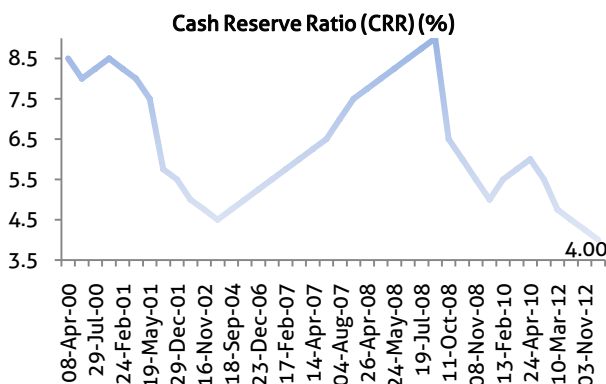
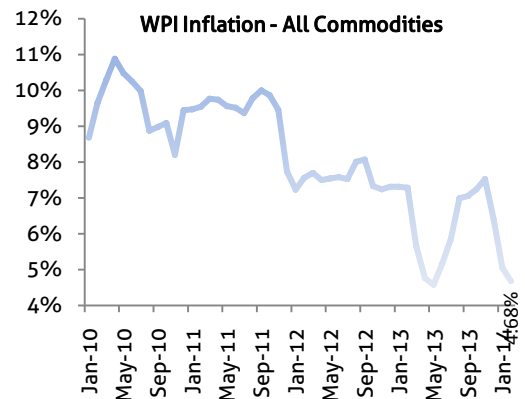
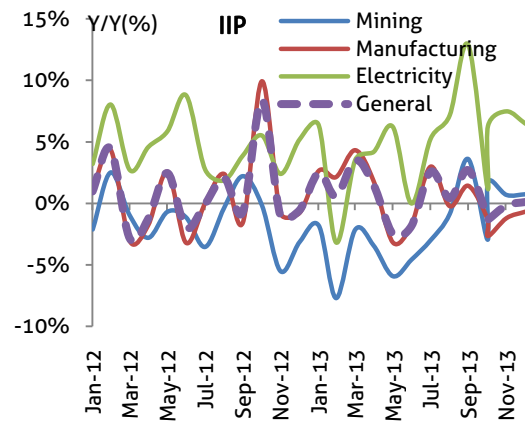
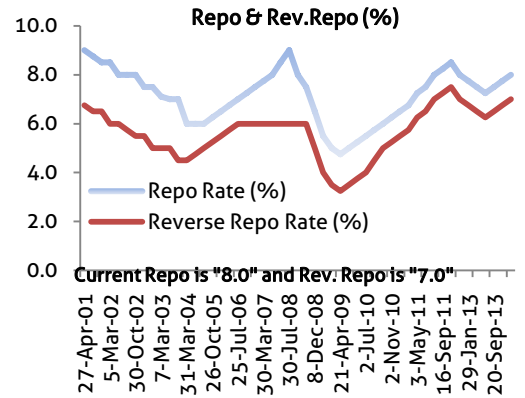
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3787	0.0008	0.06
GBP-USD	1.6518	0.0014	0.08
USD-JPY	102.34	(0.05)	(0.05)

Bond Markets	Closing	Chg
10-yr bond	9.05	3.0 bps
Interbank call	8.94	3.0 bps



Domestic News (Cont...)

- ❖ Realty major Tata Housing said it will invest over Rs 700 crore to develop a new housing project in Chennai. (BS)
- ❖ Awarding a compensation of Rs 4.25 lakh to a resident of Dombivili in Thane district the Thane District Consumer Redressal Forum held the Life Insurance Corporation (LIC) responsible for delaying processing an insurance policy. (BS)
- ❖ Hinduja group flagship Ashok Leyland launched its intermediate commercial vehicle Boss in the Delhi market priced between Rs 10.5 lakh and Rs 12 lakh. (BS)
- ❖ State-owned NTPC will make a presentation within a week to electricity regulator CERC to consider its case against the new 5-year tariff regulations. (BS)
- ❖ After two months of increase, natural gas production from Reliance Industries' eastern offshore KG-D6 block has again started to drop. (BS)
- ❖ The Chairman-cum-Managing Director (CMD) of a telecom firm here has been arrested for allegedly evading service tax of about Rs 32 crore.
- ❖ Rating agency Standard & Poor's believes that the Indian telecom industry is all set to revive, with improving regulatory risk and moderating competition.
- ❖ Tata Motors-owned Jaguar Land Rover has invested 45 million pounds in a new press line at its Halewood Operations, near Liverpool, England in a bid to speed up delivery of the company's vehicles globally.
- ❖ IT services and solutions firm Tech Mahindra, announced the inauguration of its third near shore delivery centre in Düsseldorf, Germany. The company already serves its European customers through 26 offices across 31 cities.
- ❖ IDFC Alternatives, a multi-asset class fund managers with a corpus of Rs 14,414 crore, announced the close of its first real estate fund - IDFC Real Estate Yield Fund, a domestic fund focused on the residential real estate segment in India.
- ❖ Billionaire Mukesh Ambani's Reliance Retail is poised to perform a rare feat in India's notoriously complex retail market by finally turning a profit.



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Mar-14	Mastek Ltd	MASTEK LIMITED BUYBACK OFFER	BUY	825000	221.1
20-Mar-14	Polaris Fin Tech Ltd	GAJANAN ENTERPRISES	SELL	525262	200.4
20-Mar-14	Geometric Limited	IDBI TRUSTESHIP SERV. LTD. (IAF-V)	SELL	364690	119.7
20-Mar-14	Dynamatic Tech. Ltd.	FIL INVESTMENTS (MAURITIUS) LIMITED	SELL	51000	607.9
20-Mar-14	Sudar Industries Limited	SPS CAPITAL & MONEY MANAGEMENTSERVICES PVT.LTD.	BUY	530141	18.5

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Mar-14	Excel Crop	RATNABALI INVESTMENT PRIVATE LIMITED	B	407,585	529.4
20-Mar-14	Oscar Invest	VITOBA COSMETICS PRIVATE LIMITED	S	175,000	191.7
20-Mar-14	Forbes & Co-\$	SPS CAPITAL & MONEY MANAGEMENT SERVICES PVT LTD	S	66,000	497.5
20-Mar-14	Dynamatic Tech-\$	FIL INVESTMENTS MAURITIUS LTD	S	50,850	607.9
20-Mar-14	STAMPEDE	TAX AND FINANCE SERVICES INDIA PVT LTD	B	450,000	66.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
520077	Amtek Auto-\$	20-Mar-14	Dividend - Rs.0.50	-
532282	Amtek India-\$	20-Mar-14	Dividend - Rs.0.10	-
532178	Engineers India	20-Mar-14	Interim Dividend - Rs.3.50	21-Mar-14
532129	Hexaware Tech	20-Mar-14	Final Dividend - Rs.1.00	-
524330	Jayant Agro	20-Mar-14	Interim Dividend - Rs.2.50	21-Mar-14
500249	KSB Pumps	20-Mar-14	Final Dividend - Rs.4.50	-
513544	Mardia Samyoung	20-Mar-14	Reduction of Capital	21-Mar-14
536666	STAR FERRO	20-Mar-14	Interim Dividend - Rs.0.33	21-Mar-14
513121	Oricon Enter-\$	21-Mar-14	Interim Dividend - Rs.0.25	24-Mar-14
500410	ACC	24-Mar-14	Final Dividend - Rs.19.00	-
520056	Sundaram Clayton	24-Mar-14	2nd Interim Dividend - Rs.3.75	25-Mar-14
532826	Raj Television	25-Mar-14	BONUS 1:1	26-Mar-14
532826	Raj Television	25-Mar-14	Stock Split from Rs. 10/- to Rs.5/-	26-Mar-14
531680	Mayur Leather	26-Mar-14	Interim Dividend - Rs.-	27-Mar-14
513683	Neyveli Lignite	26-Mar-14	Interim Dividend - Rs.-	27-Mar-14
533106	OIL INDIA	26-Mar-14	2nd Interim Dividend - Rs.-	27-Mar-14
531092	Om Metals	26-Mar-14	Interim Dividend - Rs.0.10	27-Mar-14
505790	FAG Bearings	27-Mar-14	Dividend - Rs.6.00	-
500312	ONGC	27-Mar-14	2nd Interim Dividend - Rs.-	29-Mar-14
513418	Shimoga Tech	27-Mar-14	Reduction of Capital	28-Mar-14
501061	State Bank BkJpr	27-Mar-14	Interim Dividend - Rs.-	31-Mar-14
530961	Vikas Globalone	27-Mar-14	Stock Split from Rs.10/- to Re.1/-	30-Mar-14

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
17-Mar-14	EUR	CPI (YoY)		0.80%	0.80%
17-Mar-14	USD	NY Empire State Manuf Index		6	4.48
17-Mar-14	USD	Industrial Production (MoM)		0.10%	-0.30%
18-Mar-14	EUR	Trade Balance		14.5B	16.0B
18-Mar-14	USD	Building Permits		0.960M	0.945M
18-Mar-14	USD	CPI (MoM)		0.10%	0.10%
18-Mar-14	USD	Housing Starts		0.910M	0.880M
19-Mar-14	JPY	Trade Balance		-590B	-2,790B
19-Mar-14	GBP	Unemployment Rate		7.20%	7.20%
19-Mar-14	USD	MBA 30-Year Mortgage Rate			4.52%
19-Mar-14	USD	Current Account		-88.0B	-94.8B
19-Mar-14	USD	FOMC Meeting Announcement			
20-Mar-14	USD	Initial Jobless Claims		322K	315K
20-Mar-14	USD	CB Leading Index (MoM)		0.20%	0.30%
20-Mar-14	USD	Existing Home Sales		4.61M	4.62M
20-Mar-14	USD	Philadelphia Fed Manuf Index		3.8	-6.3
21-Mar-14	GBP	Public Sector Net Borrowing		8.6B	-6.4B
21-Mar-14	EUR	Consumer Confidence		-12.4	-12.7

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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