

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8529	(0.86)	CNX IT	11655	3.45
Sensex	28182	(0.84)	BANK NIFTY	18723	(1.63)
DowJones	17919	(1.00)	S&P CNX 500	7070	(1.09)
Nasdaq	5208	(0.21)	CNX FMCG	20143	(1.80)
Hangseng	25363	(0.68)	CNX REALTY	3560	(1.12)
Shanghai	4034	0.41	CNX AUTO	8440	(0.42)
Nikkei	20581	(1.25)	CNX ENERGY	8804	(1.75)
Strait Times	3368	(0.10)	CNX PHARMA	3865	0.68
Kospi	2063	(0.99)	Advances / Declines	BSE	NSE
Taiwan	8927	(0.88)	Advances	946	337
FTSE	6769	(0.29)	Declines	1883	1165
CAC	5107	(0.70)	Unchanged	101	47
DAX	11605	(1.12)	Total	2930	1549

Nifty Gainers		
Company	Price(Rs)	Chg(%)
INFY	1116.35	11.50
BHARTIARTL	445.00	3.62
HCLTECH	970.05	2.47
ZEEL	387.00	2.21
WIPRO	578.05	1.66

Nifty Losers		
Company	Price(Rs)	Chg(%)
SUNPHARMA	805.00	(15.08)
LUPIN	1878.30	(5.05)
VEDL	136.00	(5.03)
ASIANPAINT	814.95	(4.38)
ULTRACEMCO	3215.05	(4.14)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
BLUESTINFO	2.99	0.1	29
SUNPHARMA	29.63	1.8	17
SADBHAV	2.30	0.2	14
KSK	19.26	1.4	13
WHIRLPOOL	1.81	0.2	12

Indian Forex	Closing	Chg	% Chg
USD/INR	63.651	0.100	0.16
GBP/INR	99.136	0.034	0.03
EUR/INR	68.908	0.076	0.11
JPY/INR	51.170	(0.030)	(0.06)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	25023	(46)
Silver (Rs/1kg)	33966	91

Commodities	Price	% Chg.
Crude (US\$/BBL)	50.2	0.42
Brent (US\$/BBL)	56.6	0.04
Gold (US/oz)	1095.5	(0.61)
Silver (US\$/oz)	14.7	(0.07)
Copper (US\$/MT)	5475.5	0.93
Alum (US\$/MT)	1630.5	(0.37)
Zinc(US\$/MT)	2044.5	0.84

ADR	Cl. Values	% Chg.
ICICI Bank	10.13	(0.21)
HDFC Bank	61.79	(1.95)
Infosys	17.06	1.29
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	60.75	(1.31)
Wipro	12.46	0.30
Tata Motors	30.66	0.16

Market Sensor

US market closed lower on Tuesday, with lackluster earnings from a few blue chips pressuring the Dow Jones industrial average 1 percent. Dow Jones Industrial Average was down 1.00% or 181.12 points at 17919.29. Nasdaq Composite was down 0.21% or 10.74 points at 5208.12. Standard & Poor's 500 was down 0.43% or 9.07 points at 2119.21.

Indian equity market witnessed profit taking on Tuesday and lost close to a percent by the end. Presently market sentiment would be dominated by the development from the monsoon session with GST and Land acquisition bill would be in focus. Nifty ended the previous day with a decline of 0.86% or 74.00 at 8529.45. On Tuesday's trading session, FIIs sold Rs.226.88 Cr in cash market and sold net Rs.261.34 in derivative segment. Whereas, DII bought net Rs.146.32 Cr in cash segment.

Global News

❖ Greek Prime Minister Alexis Tsipras tried to rally his Syriza party on Tuesday before a vote in parliament on the second package of measures demanded by international creditors to open talks on a new bailout deal. (Reuters)

❖ Standard & Poor's on Tuesday upgraded Greece's sovereign credit rating by two notches and revised its outlook to stable from negative, citing euro zone countries initial agreement to start negotiations with the country on a third bailout. (Reuters)

❖ U.S. employers are finding it increasingly difficult to find skilled workers, according to a survey published on Monday, suggesting upward pressure on wage growth down the road. (CNBC)

❖ Ukraine has extended hastily assembled talks with creditors amid predictions that the country could default as early as Friday if an agreement is not reached. (CNBC)

❖ Confidence at Japanese manufacturers in July was subdued and the service sector mood dimmed the most in over a year, a Reuters poll showed, reflecting worries about sluggish consumption and exports as growth cools in major trading partner China. (Reuters)

Economic News

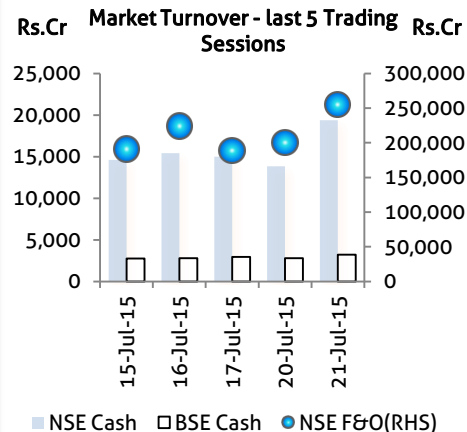
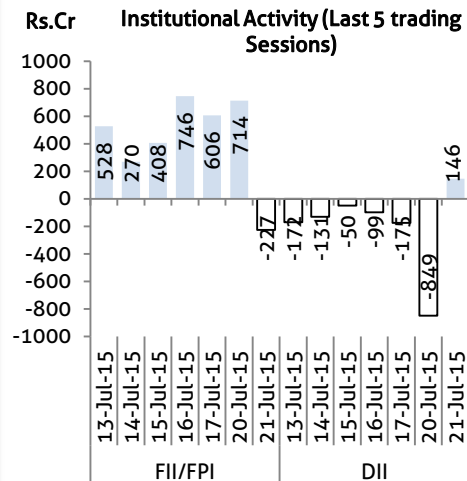
- ❖ Punjab plans to harness the extensive canal network in the state for the generation of an estimated 1,000 Mega watt of solar power. Bikramjit Singh Majithia, Minister of New and Renewable Energy, Punjab, told Business Standard that the state has been allocated 20 MW of solar power generation by the government of India under the pilot project under which a grant of Rs 3 cr per Mw would be provided. The cost of canal top solar power generation is Rs 10 cr per mega watt. Projects worth 5 Mw are under the tendering process those would be allocated under BOO (Built-operate-own basis). (BS)
- ❖ Prime Minister Narendra Modi will release 'Vision 2050' prepared by the Indian Council for Agricultural Research (ICAR) in Patna on July 25, Union Agriculture Minister Radha Mohan Singh said. (BS)
- ❖ States like Maharashtra, Orissa, Chhattisgarh, Jharkhand and Karnataka have launched exercise for the establishment of District Mineral Foundation Trust (DMFT) to work for the interest and benefit of persons and areas affected by mining related operations in the district. (BS)
- ❖ The underlying business sentiment in India during July-September quarter of calendar 2015 is likely to remain subdued amid concerns of weak factory data and potential impact of deficient monsoon, a study said. (BS)
- ❖ The El Nino phenomenon, which has often disrupted rainfall in India, has strengthened to a level that exceeds its record set in 1997. It is likely to persist into early 2016, the Australia Bureau of Meteorology said in an update on Tuesday. Meteorologists are hopeful that a rainboosting phenomenon — a positive Indian Ocean Dipole (IOD) could ensure normal monsoon this year. (ET)
- ❖ India has raised the issues of market access for agrarian and pharma products, and high visa costs with the US during an official-level meeting on Tuesday. Commerce Secretary Rita Teotia took up the matter with Deputy US Trade Representative Robert Holleyman. (ET)
- ❖ The government has given final approval to 13 proposals for setting up of mega food parks in various parts of the country including rural areas during the current Five Year Plan period, parliament was informed on Tuesday. (ET)

Domestic News

- ❖ Indian pharmaceutical major Cipla Limited announced that the company's board has approved a potential investment by Fidelity Growth Partners India and US-based Fidelity Biosciences, through FIL Capital Investments (Mauritius) II Limited or its affiliates, in its recently launched consumer healthcare business. (BS)
- ❖ Civil aviation ministry has said it is not planning to cap fares. The ministry which has been receiving complaints from parliamentarians over unreasonable fare hikes in peak season said it is not considering a mechanism for capping of airfares to curb predatory pricing. (BS)
- ❖ Infrastructure major HCC has been awarded a Rs 785 crore contract by Northeast Frontier Railway in joint venture with Coastal Projects Ltd. (BS)
- ❖ Idea Cellular Ltd posted on Tuesday a better-than-expected 28 percent jump in quarterly profit, helped by higher data revenue, and said it would introduce 4G LTE services in 10 service areas next year. (BS)
- ❖ Infosys said it has invested \$1.4 million (Rs 8.82 crore) for a 5% stake in ANSR Consulting, a Bengaluru firm that helps global firms set up offshore captive centres in India. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.0929	(0.0007)	(0.06)
GBP-USD	1.5561	0.0004	0.03
USD-JPY	123.66	(0.2300)	(0.19)

Bond Markets	Closing	Chg
10-yr bond	7.98	-0.20 bps
Interbank call	6.84	-24.33 bps



Domestic News (Cont...)

❖ With the anti-dumping duty (ADD) on soda ash set to end by 2017, the industry is getting its act together by planning phased capacity additions. However, lack of demand especially in the glass industry is seen as a challenge to capacity expansion of soda ash plants. (BS)

❖ Pipavav Defence and Offshore Engineering announced the signing of a multi-crore agreement with Russia-based JSC Ship Repairing Centre Zvyozdochka for medium refits and life certification of eight EKM 877 submarines in India. (BS)

❖ Asian Paints reported a consolidated net profit of Rs 455.18 crore on higher net sales of Rs 3,577.97 crore for the first quarter ended June 30, 2015. (BS)

❖ Piramal Realty, the real estate development arm of Piramal Group, announced that an affiliate of Warburg Pincus, a leading global private equity firm focused on growth investing, will invest Rs 1,800 crore (\$284 million) for a minority stake in the company. (BS)

❖ Vedanta has scaled down aluminium business and may make "huge" job cuts due to low global prices and rising imports, its chief executive Abhijit Pati told Reuters, urging the government to raise tariffs. (BS)

❖ Adani Transmission India is looking to raise around \$1 billion through a debut offshore bond offering, according to sources familiar with the matter. (BS)

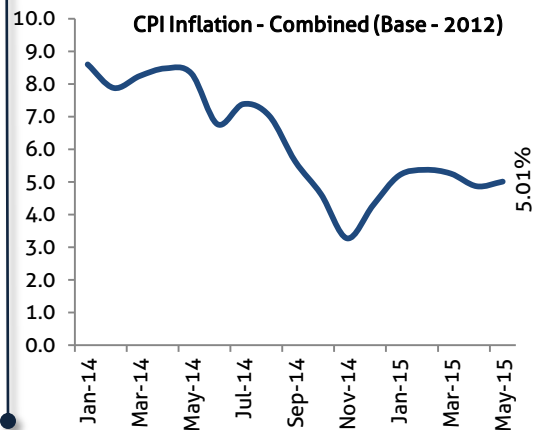
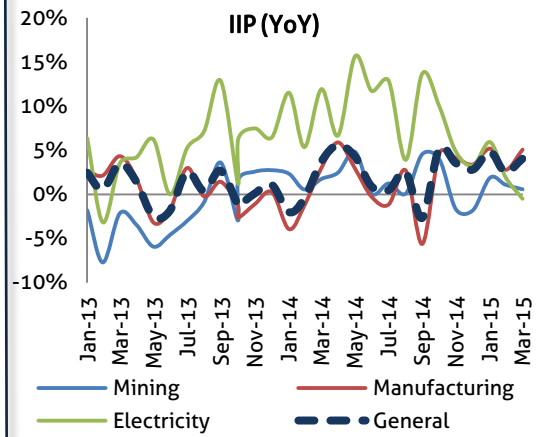
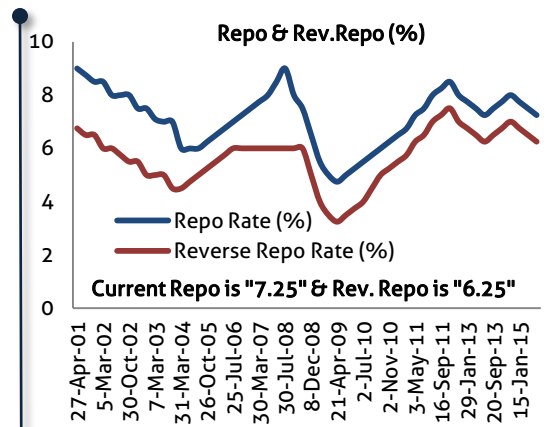
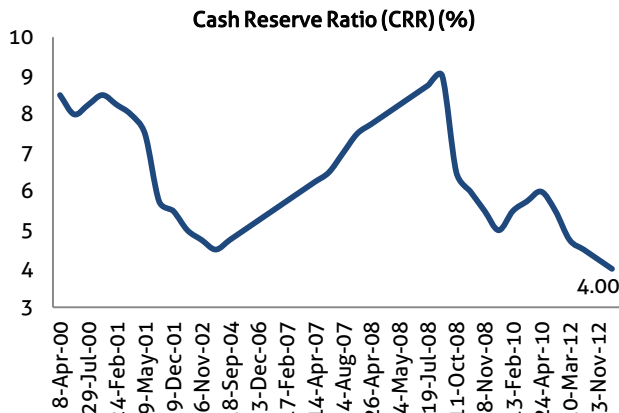
❖ FMCG major Hindustan Unilever Ltd (HUL) reported a 4.03% increase in standalone net profit at Rs 1,059.14 crore for the first quarter ended June 30. (BS)

❖ Drug major Cipla said private equity player Fidelity Growth Partners will make investment in its consumer healthcare business. (BS)

❖ Home appliances major Bosch said it plans to invest Rs 400 crore in its Chennai facility, which currently manufactures washing machines. (BS)

❖ Consumer durables firm Whirlpool India reported a 18.19 per cent increase in standalone net profit at Rs 98.1 crore for the first quarter ended June 30, thanks to lower expenses. (BS)

❖ HDFC Bank, the country's second largest private sector lender, reported a 21% rise in net profit to Rs 2,695.7 crore on the back of an increase in net interest income and robust other income. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
21-Jul-15	Welspun Enterprises Ltd	NIPPON INVESTMENT & FINANCE CO PVT LTD	SELL	936000	53.3
21-Jul-15	Omkar Spl Chem Ltd	CELESTIAL TRADECHEM PRIVATE LIMITED	SELL	174931	181.6
21-Jul-15	Astec LifeSciences Ltd	GKN SECURITIES	SELL	101595	287.4
21-Jul-15	Blue Star Infotech Ltd.	GKN SECURITIES	BUY	57252	242.5
21-Jul-15	Lokesh Machines Limited	ASIT C MEHTA INVESTMENT INTERMEDIATES LTD.	SELL	130317	98.6

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
21-Jul-15	SALZER	RIDDHI PORTFOLIO PRIVATE LIMITED	B	121,111	260.0
21-Jul-15	ASTEC	GKN SECURITIES	B	101,770	287.6
21-Jul-15	CAPITALT	INDO CREDITOP PVT LTD	S	113,698	250.0
21-Jul-15	BLUESTINFO	GKN SECURITIES	S	57,252	242.4
21-Jul-15	PROFINC	GAJANAN ENTERPRISES	B	49,540	268.3

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500488	ABBOTINDIA	22-Jul-15	Final Dividend - Rs. - 31.0000	-
500410	ACC	22-Jul-15	Interim Dividend - Rs. - 11.0000	23-Jul-15
517041	ADORWELD	22-Jul-15	Dividend - Rs. - 5.0000	-
523694	APCOTEXIND	22-Jul-15	Dividend - Rs. - 7.0000	-
533573	APLLTD	22-Jul-15	Dividend - Rs. - 3.5000	-
500084	CESC	22-Jul-15	Dividend - Rs. - 9.0000	-
506894	CHEMFALKAL	22-Jul-15	Final Dividend - Rs. - 1.2500	-
523367	DCMSHRIRAM	22-Jul-15	Final Dividend - Rs. - 0.4000	-
500125	EIDPARRY	22-Jul-15	Final Dividend - Rs. - 1.0000	-
523127	EIHAHOTELS	22-Jul-15	Dividend - Rs. - 3.0000	-
500840	EIHOTEL	22-Jul-15	Dividend - Rs. - 1.1000	-
509675	HYDIND	22-Jul-15	Final Dividend - Rs. - 10.0000	-
504741	INDIANHUME	22-Jul-15	Dividend - Rs. - 3.0000	-
524494	IPCALAB	22-Jul-15	Dividend - Rs. - 1.0000	-
532313	MAHLIFE	22-Jul-15	Final Dividend - Rs. - 6.0000	-
531727	MENNPIS	22-Jul-15	Dividend - Rs. - 4.0000	-
526721	NICCOPAR	22-Jul-15	Dividend - Rs. - 0.1500	-
526721	NICCOPAR	22-Jul-15	Special Dividend - Rs. - 0.1500	-
500314	ORIENTHOT	22-Jul-15	Dividend - Rs. - 0.4000	-
506590	PHILIPCARB	22-Jul-15	Dividend - Rs. - 1.0000	-
532661	RML	22-Jul-15	Dividend - Rs. - 4.5000	-
533168	ROSSELLIND	22-Jul-15	Dividend - Rs. - 0.5000	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
20-Jul-15	EUR	Current Account n.s.a. (May)			20.4B
21-Jul-15	GBP	Public Sector Net Borrowing (Jun)			9.35B
22-Jul-15	USD	MBA 30-Year Mortgage Rate			4.23%
22-Jul-15	USD	House Price Index (May)			221.7
22-Jul-15	USD	Existing Home Sales (Jun)		5.40M	5.35M
23-Jul-15	JPY	Trade Balance (Jun)		5B	-216B
23-Jul-15	GBP	Retail Sales (YoY) (Jun)		4.70%	4.60%
23-Jul-15	USD	Chicago Fed National Activity (Jun)			-0.17
23-Jul-15	USD	CB Leading Index (MoM) (Jun)		0.10%	0.70%
23-Jul-15	EUR	Consumer Confidence (Jul)		-5.5	-5.6
23-Jul-15	USD	Initial Jobless Claims			
23-Jul-15	USD	KC Fed Manufacturing Index (Jul)			-21
24-Jul-15	JPY	Manufacturing PMI (Jul)			50.1
24-Jul-15	CNY	HSBC Manufacturing PMI (Jul)		49.8	49.4
24-Jul-15	EUR	Manufacturing PMI (Jul)		52.5	52.5
24-Jul-15	EUR	Services PMI (Jul)		54.2	54.4
24-Jul-15	USD	Manufacturing PMI (Jul)			53.6
24-Jul-15	USD	New Home Sales (Jun)		543K	546K

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
22-Jul-15	INR	M3 Money Supply (2wk)			11.00%
24-Jul-15	INR	Bank Loan Growth (2wk)			9.30%
24-Jul-15	INR	Deposit Growth (2wk)			11.40%

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