

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5834	0.89	CNX IT	6118	-1.83
Sensex	19170	0.81	BANK NIFTY	12576	2.34
DowJones	14567	0.14	S&P CNX 500	4574	1.05
Nasdaq	3234	0.00	CNX FMCG	15789	0.50
Hangseng	21815	-1.04	CNX REALTY	248	3.65
Shanghai	2206	-1.60	CNX AUTO	4424	0.59
Nikkei	13537	-0.23	CNX ENERGY	7857	0.62
Strait Times	3289	-0.59	CNX PHARMA	6364	0.14
Kospi	1913	-0.71	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	7936	-0.43	Advances	1390	832
FTSE	6281	0.00	Declines	1004	469
CAC	3652	0.00	Unchanged	140	68
DAX	7478	0.00	Total	2534	1369

Nifty Gainers		
Company	Price(Rs)	Chg(%)
RELINFRA	383.55	5.15
COALINDIA	313.35	4.59
LT	1538	4.24
HDFCBANK	701.35	4.12
INDUSINDBK	466.75	3.64

Nifty Losers		
Company	Price(Rs)	Chg(%)
ULTRACEMCO	1869.65	-3.01
INFY	2245	-2.21
HCLTECH	720.4	-2.15
ONGC	327.65	-2.00
TCS	1425	-1.91

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Thermax	2.15	0.25	8.5
Kajaria Cerm	2.82	0.36	7.94
Amara Raja	7.18	1.53	4.69
Strides Arco	3.17	0.71	4.45
Mahindra & Mah Fin	4.71	1.25	3.76

Indian Forex	Closing	Chg	% Chg
USD/INR	54.1665	-0.1367	-0.25%
GBP/INR	82.4522	-0.0216	-0.03%
EUR/INR	70.7045	-0.2112	-0.30%
JPY/INR	54.31	0.83	1.51%

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26430	630
Silver (Rs/1kg)	43845	25

Commodities	Price	% chg.
Crude (US\$/BBL)	88.9	1.03
Brent (US\$/BBL)	100.0	0.39
Gold (US/oz)	1424.1	2.04
Silver (US\$/oz)	23.3	1.52
Copper (US\$/MT)	6875.5	-1.43
Alum (US\$/MT)	1841.0	-1.63
Zinc(US\$/MT)	1836.5	-1.13

ADR	Cl. Values	% Chg.
ICICI Bank	44.78	0.34
HDFC Bank	41.53	1.79
Infosys	41.31	-1.03
Sterlite Inds.	6.43	0.00
Dr Reddy's Labs	35.06	-0.76
Wipro	7.81	-3.94
Tata Motors	26.40	1.50

## Market Sensor

U.S market ended in positive territory Monday, reversing their earlier declines, as strong gains in materials and energy offset weak housing data. Dow Jones Industrial Average was up 0.14% or 19.66 points at 14567.17. Nasdaq Composite was up 0.86% or 27.49 points at 3233.55. Standard & Poor's 500 was up 0.47% or 7.25 points at 1562.50.

Nifty extended its pullback rally for the 6<sup>th</sup> consecutive day in a row and ended the previous trading session with a gain of 0.89%. Decline in commodity prices followed by higher than expected decline in inflation had been acting as a catalyst for the market. Nifty ended the previous trading session with a gain of 0.89% or 51.30 points at 5834.40. On last trading session, FII's bought net Rs.915.82 Cr in cash market and bought net Rs 1272.66 Cr. in derivative segment. Whereas, DII sold net Rs 442.54 Cr in cash segment.

**Coming to today's trade, Nifty is expected to trade volatile and support should emerge around 5790 followed by 5730.**

## Global News

- ❖ Asian stocks fell, erasing earlier gains, after a preliminary report showed Chinese manufacturing expanded less than economist estimated. (Bloomberg)
- ❖ While many investors have greeted the prospect of new Japanese money flooding world markets as a windfall, some strategists warn a sliding yen could yet shock Asia and developing countries. (Bloomberg)
- ❖ Comments by European Central Bank policymakers on Monday stressing falling inflation and poor growth prospects in the Euro zone suggest the ECB may be leaning towards a further cut in its main refinancing rate. (Bloomberg)
- ❖ Malaysian Prime Minister Najib Razak's move in 2009 to open up his party's leadership selection may prove a job-saver should he fail to boost its share of the vote in national elections next month (Bloomberg)
- ❖ In a temporary relief to former military ruler Pervez Musharraf, Pakistan's interim government refused to put him on trial for treason for violating the Constitution, saying such a move was not part of its mandate. (Bloomberg)

## Economic News

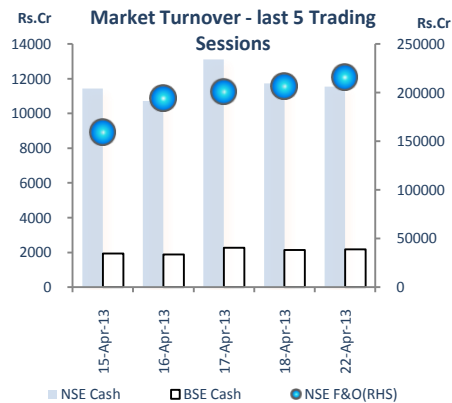
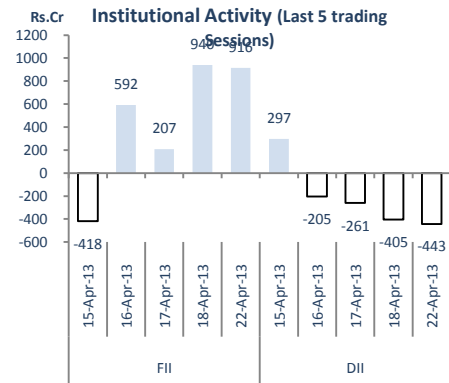
- ❖ The Plan funds allocated to the Ministry of Statistics and Programme Implementation (MOSPI) were not consistent with the capacity of the Ministry to spend as the allocated funds were underutilised in the last three years, a Parliamentary Panel said . (BS)
- ❖ Expressing concerns over the lukewarm response to Rajiv Gandhi Equity Savings Scheme (RGESS), a Parliamentary panel asked the Finance Ministry to review the scheme and formulate alternative proposals to encourage savings. (BS)
- ❖ The business environment gets affected due to lack of security of women as they account for a large chunk of workforce, industry body Assocham said . (BS)
- ❖ A Parliamentary panel asked the government to make strenuous efforts for widening tax base which has not grown in tandem with increase in growth in income and wealth over the years. (BS)
- ❖ The Corporate Affairs Ministry has been asked by a Parliamentary panel to step up its hiring of professional staff for agencies like SFIO and CCI, as also the Registrars of Companies (RoCs), and to increase various fees levied on registered companies to mop up resources. (BS)
- ❖ There was a sharp 44% spurt in the number of medium firms that became sick during 2011-12, although micro and small units witnessed a decline of 5% , Parliament was informed . (BS)

## Domestic News

- ❖ SpiceJet said its promoter Kalanithi Maran's stake in the no-frills airline has increased by nearly six% to 22.05% due to allotment of equity shares following conversion of convertible debentures. (BS)
- ❖ Power and automation technology firm ABB said it will acquire US-based solar energy company Power-One for over \$1 billion (around Rs 5,400 crore) to become a global leader in solar photo-voltaic inverters. (BS)
- ❖ AirAsia has tied up with Tourism Authority of Thailand offering cheap fares and discounts in over 15,000 shops and restaurants in Thailand. As a part of the campaign one way tickets from Chennai and Kolkata to Bangkok are being sold for Rs 3,500 and Rs 5,000 respectively. The sale offer is valid till May 5 and for travel between July and October end. (BS)
- ❖ Tata Sponge Iron reported a 36% decline in standalone net profit for January-March quarter at Rs 9.36 crore despite a rise in total income. (BS)
- ❖ Mahindra Lifespaces, part of the Mahindra group, posted 95 per cent increase in net profit at Rs 82 crore for the quarter ended March 31, mainly on the back of improved sales. (BS)
- ❖ The Sahara group and its promoter Subrata Roy faced a tough time in the Supreme Court which pulled them up for not refunding Rs 24,000 crore to its investors and accused them of "manipulating courts" by approaching different forums for relief. (BS)
- ❖ UltraTech Cement reported a 16.27% decline in its standalone net profit at Rs 726.20 crore for the quarter ended March 2013, largely due to muted sales growth and increased tax outgo. (BS)
- ❖ Videocon Industries and Bharat Petroleum Corp Ltd (BPCL) have reported a fourth huge natural gas discovery in an offshore Mozambique block, where they hold 10% stake each. (BS)
- ❖ Reliance Communications' under- sea cable arm, Reliance Globalcom said Saudi Arabia based Mobily has become its first customer to be activated on the recently launched Hawk submarine cable system. (BS)

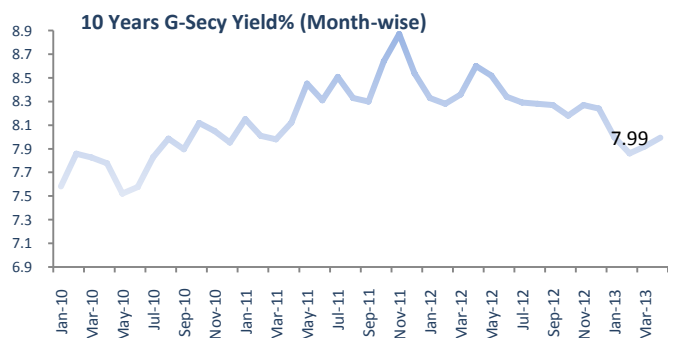
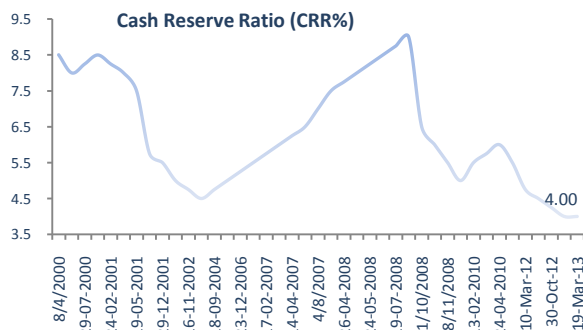
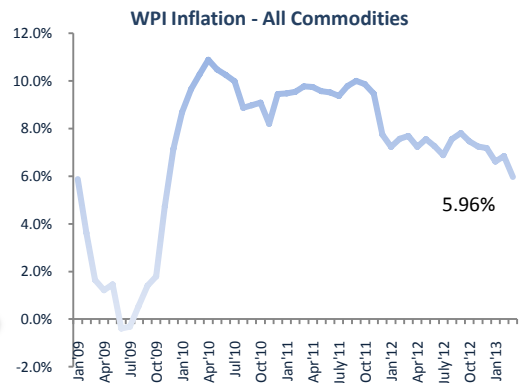
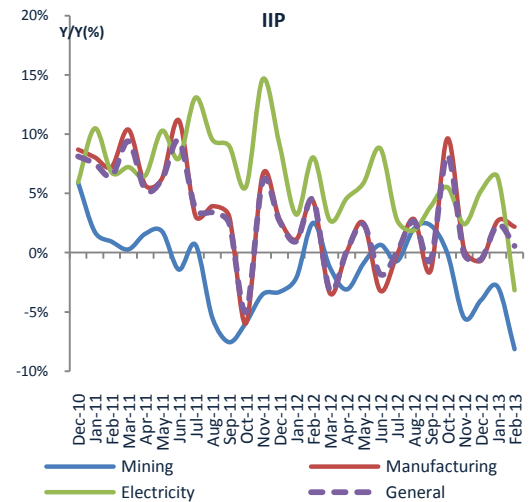
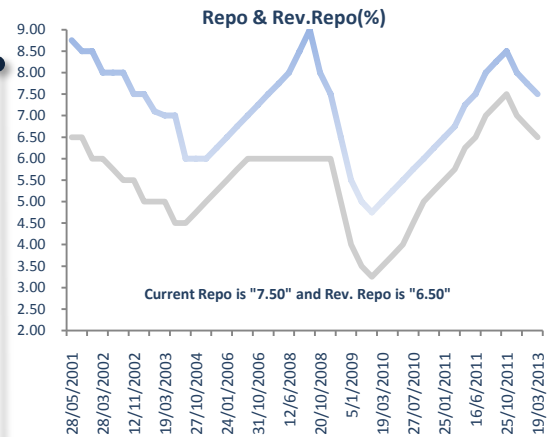
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3051	-0.0015	-0.11%
GBP-USD	1.5272	-0.0018	-0.12%
USD-JPY	98.950	-0.2800	-0.28%

Bond Markets	Closing	Chg
10-yr bond	7.73	-2.1 bps
Interbank call	7.57	5 bps



## Domestic News(Conti..)

- ❖ Honda Cars India Ltd will export diesel engine components to Asian and European markets from India, besides lining up 3-4 new models of cars with diesel engines to boost its sales. (BS)
- ❖ It is likely to be a win-win situation for all players involved- the oil marketing companies (OMCs) such as Indian Oil Corporation (IOC), Bharat Petroleum Corporation (BPCL) and Hindustan Petroleum Corporation (HPCL), the upstream companies (ONGC, OIL India and GAIL) as well as the government of India. (BS)
- ❖ NIIT Technologies secures Rs 185 crore financial management contract, will help Andhra Pradesh govt to transform from current public finance systems to a futuristic world class enterprise solution. (BS)
- ❖ Steel major Tata Steel is hitting the markets tomorrow for a possible Singapore dollar- denominated bond sale, merchant bankers said . (BS)
- ❖ Gitanjali Gems, announced the merger of Gems London with Tokyo based Imacbc. (BS)
- ❖ State-run Coal India has made changes with regard to certain provisions of model fuel supply agreement (FSA) applicable to new power plants, amid Coal India and NTPC at loggerheads over coal quality issue. (BS)
- ❖ Steel Authority of India (SAIL) plans to nearly double the network of its rural dealers to 1,000 in phases from 562 now, Parliament was informed . (BS)
- ❖ A PIL was filed in the Calcutta High Court seeking a CBI investigation into chit fund companies that have allegedly defrauded lakhs of investors in West Bengal following closure of the Saradha Group of companies while also demanding the arrest of Rajya Sabha MP Kunal Ghosh. (BS)
- ❖ IL&FS Engineering and Construction Company Ltd has received a letter of Intent (LoI) from IPTF, Fujairah, FZC for oil pipeline work at Port of Fujairah for an amount of Rs 71.4 crore, the company said in an announcement on the BSE. (BS)
- ❖ Sunil Bharti Mittal, Chairman and Group CEO, Bharti Enterprises has been appointed as the vice chairman of the International Chamber of Commerce (ICC). (BS)
- ❖ After remaining suspended for about two and a half months, land acquisition resumed for Posco Steel's Rs 52,000 crore mega project in Odisha's Jagatsinghpur district. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
22-Apr-13	Housing Development and I	ALIVE CONSULTANTS ALIVE	BUY	3097016	54.12
22-Apr-13	IVRCL Limited	AMBIT SECURITIES BROKING PVT. LTD.	BUY	2631176	20.21
22-Apr-13	Atlas Cycles (Haryana) Lt	VISHWAS FINCAP SERVICES PRIVATE LIMITED	BUY	46110	295.59
22-Apr-13	Autoline Industries Limit	CROSSEAS CAPITAL SERVICES PVT. LTD.	SELL	65069	120.86
22-Apr-13	Taksheel Solutions Ltd	RANGOLI COMMONEAL PRIVATELIMITED	BUY	219492	6.59

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
22-Apr-13	First Financial	UMA SONGAL	S	75000	295.72
22-Apr-13	Aanjaneya Lifecare	BAKULESH TRAMBAKALAL SHAH	B	263000	76.65
22-Apr-13	Autoline Inds	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	64920	120.88
22-Apr-13	EVERONN	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	128783	60.79
22-Apr-13	Aanjaneya Lifecare	PARK HABITATS PRIVATE LIMITED	S	69621	77.1

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Rs.
531448	ARROW SECURI	23-Apr-13	Stock Split from Rs.10/- to Rs.5/-	-
500123	Elantas Beck-\$	23-Apr-13	Dividend	4.5
500123	Elantas Beck-\$	23-Apr-13	Special Dividend	87.5
500092	CRISIL	25-Apr-13	Interim Dividend	3
507488	GM Breweries	26-Apr-13	Dividend	2.5
531695	SHREYCHEM	26-Apr-13	Stock Split from Rs. 10/- to Rs. 5/-	-
506803	Fulford India-\$	29-Apr-13	Final Dividend	1
500002	ABB	30-Apr-13	Final Dividend	3
509496	ITD Cem India	30-Apr-13	Dividend	2
532891	Puravankara Proj	30-Apr-13	Interim Dividend	2.5
532735	R Systems	30-Apr-13	Final Dividend	-
590031	De Nora India	2-May-13	Final Dividend	-
500150	Foseco India	2-May-13	1st Interim Dividend	1.5
531642	Marico	3-May-13	2nd Interim Dividend	-
532819	Mindtree	3-May-13	2nd Interim Dividend	4
500387	Shree Cement	3-May-13	Interim Dividend	-
532343	TVS Motor	3-May-13	2nd Interim Dividend	-
523457	LINDEINDIA	6-May-13	Dividend	1.5
500068	Disa India	7-May-13	Dividend	2.5
532424	Godrej Cons	8-May-13	Interim Dividend	-
500530	Bosch	10-May-13	Dividend	60
500325	RIL	10-May-13	Dividend	9

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
4/22/2013	EUR	Consumer Confidence			-23.5
4/22/2013	USD	Existing Home Sales		5.01M	4.98M
4/23/2013	EUR	Manufacturing PMI		47.1	46.8
4/23/2013	CAD	Core Retail Sales (MoM)			0.50%
4/23/2013	USD	Manufacturing PMI		54.7	54.6
4/23/2013	USD	New Home Sales		420K	411K
4/24/2013	AUD	CPI (QoQ)			0.20%
4/24/2013	GBP	CBI Distributive Trades Survey			
4/24/2013	USD	Core Durable Goods Orders (MoM)		0.60%	-0.70%
4/24/2013	USD	Durable Goods Orders (MoM)		-1.90%	5.60%
4/25/2013	GBP	GBP Gross Domestic Product (YoY) (1Q A)			0.20%
4/25/2013	USD	USD Initial Jobless Claims (APR 19)			346K
4/25/2013	USD	KC Fed Manufacturing			-5
4/26/2013	JPY	Bank of Japan Monetary Policy Statement			
4/26/2013	JPY	Manufacturing PMI			50.4
4/26/2013	JPY	Tokyo Core CPI (YoY)			-0.50%
4/26/2013	USD	GDP (QoQ)		3.00%	0.40%
4/26/2013	USD	Michigan Consumer Sentiment			72.3
4/22/2013	EUR	Consumer Confidence			-23.5
4/22/2013	USD	Existing Home Sales		5.01M	4.98M
4/23/2013	EUR	Manufacturing PMI		47.1	46.8

Date	Curr.	Event	Actual	Forecast	Previous

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