

| Equity       | Latest | % Chg  | NSE Sect. Indices          | Latest     | % Chg      |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty        | 8755   | (0.89) | CNX IT                     | 12531      | (0.32)     |
| Sensex       | 28975  | (0.88) | BANK NIFTY                 | 18913      | (0.84)     |
| DowJones     | 18117  | (0.13) | S&P CNX 500                | 7148       | (0.86)     |
| Nasdaq       | 4961   | 0.10   | CNX FMCG                   | 21903      | (1.12)     |
| Hangseng     | 24712  | (0.50) | CNX REALTY                 | 3806       | (1.78)     |
| Shanghai     | 3247   | 0.76   | CNX AUTO                   | 8804       | (0.79)     |
| Nikkei       | 18490  | 0.13   | CNX ENERGY                 | 8551       | (1.37)     |
| Strait Times | 3419   | (0.05) | CNX PHARMA                 | 11641      | (0.90)     |
| Kospi        | 1979   | 0.53   | <b>Advances / Declines</b> | <b>BSE</b> | <b>NSE</b> |
| Taiwan       | 9627   | 1.02   | Advances                   | 1192       | 526        |
| FTSE         | 6912   | (0.04) | Declines                   | 1697       | 966        |
| CAC          | 4862   | 0.65   | Unchanged                  | 125        | 64         |
| DAX          | 11131  | 0.73   | Total                      | 3014       | 1556       |

| Nifty Gainers |           |        |
|---------------|-----------|--------|
| Company       | Price(Rs) | Chg(%) |
| POWERGRID     | 156.00    | 1.79   |
| KOTAKBANK     | 1316.00   | 1.37   |
| M&M           | 1265.00   | 1.04   |
| TCS           | 2700.00   | 0.91   |
| SSLT          | 218.70    | 0.64   |

| Nifty Losers |           |        |
|--------------|-----------|--------|
| Company      | Price(Rs) | Chg(%) |
| ZEEL         | 342.75    | (4.47) |
| NMDC         | 137.05    | (3.79) |
| JINDALSTEL   | 187.70    | (3.37) |
| DLF          | 146.40    | (3.27) |
| RELIANCE     | 848.10    | (2.86) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| BRFL          | 9.15            | 0.0              | 384              |
| MAFATIND-\$   | 3.43            | 0.1              | 69               |
| PCJEWELLER    | 8.71            | 0.5              | 17               |
| BALRAMCHIN    | 13.58           | 1.0              | 14               |
| MONNETISPA    | 14.04           | 1.2              | 12               |

| Indian Forex | Closing | Chg     | % Chg  |
|--------------|---------|---------|--------|
| USD/INR      | 62.184  | (0.071) | (0.11) |
| GBP/INR      | 95.707  | (0.303) | (0.32) |
| EUR/INR      | 70.759  | 0.037   | 0.05   |
| JPY/INR      | 52.280  | (0.070) | (0.13) |

| Precious Metal  | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm)  | 26400   | (200)     |
| Silver (Rs/1kg) | 36097   | (578)     |

| Commodities      | Price  | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 49.5   | (2.75) |
| Brent (US\$/BBL) | 59.2   | (2.02) |
| Gold (US/oz)     | 1203.0 | 0.05   |
| Silver (US\$/oz) | 16.4   | 0.49   |
| Copper (US\$/MT) | 5657.0 | (0.88) |
| Alum (US\$/MT)   | 1772.5 | (1.34) |
| Zinc(US\$/MT)    | 2032.0 | (0.73) |

| ADR              | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank       | 10.98      | (0.21) |
| HDFC Bank        | 59.78      | 0.13   |
| Infosys          | 36.19      | (0.73) |
| Sterlite Inds.   | 6.22       | 0.00   |
| Dr. Deddy's Labs | 54.19      | (0.41) |
| Wipro            | 13.61      | (0.17) |
| Tata Motors      | 48.97      | (0.59) |

## Market Sensor

US market pulled back from Friday's records to close narrowly mixed on Monday ahead of Fed Chair Janet Yellen's remarks over the next two days. Dow Jones Industrial Average was down 0.13% or 23.60 points at 18116.84. Nasdaq Composite was up 0.10% or 5.01 points at 4960.97. Standard & Poor's 500 was down 0.03% or 0.64 points at 2109.66.

Indian equity market witnessed profit booking activity ahead of some crucial event like that of rail budget on Thursday, Economic survey on Friday and all important budget on Saturday. Nifty ended the previous trading session with a decline of 0.89% or 78.65 points at 8754.95. On Monday's trading session, FIIs bought Rs.601.91 Cr in cash market and sold net Rs.752.58 in derivative segment. Whereas, DII sold net Rs.163.79 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8700 followed by 8650 while resistance exist at 8790 and then at 8840.**

## Global News

- ❖ Greece has unveiled an outline summary of reforms demanded by eurozone leaders in order to secure a bailout extension. The measures include plans to combat tax evasion and tackling fuel and tobacco smuggling. (BBC)
- ❖ The UK offshore oil and gas industry has reported its worst annual performance for four decades. Industry body Oil & Gas UK said falling oil prices and rising costs meant the sector spent and invested £5.3bn more than it earned from sales during 2014. (BBC)
- ❖ February saw retail sales fall back compared with a year ago - against expectations - according to a survey by the business lobby group, the CBI. Its quarterly distributive trades survey of 138 firms showed orders placed with suppliers also dropped off. (BBC)
- ❖ San Francisco Federal Reserve Bank President John Williams said the U.S. central bank needs to keep its options open regarding the possibility of raising interest rates in June, Japanese financial news daily Nikkei reported on Monday. (Reuters)
- ❖ Greece will present its economic reform plans to the euro zone on Tuesday, a government official said, missing a Monday deadline for the list which is a condition for extending the country's financial lifeline. (Reuters)

## Economic News

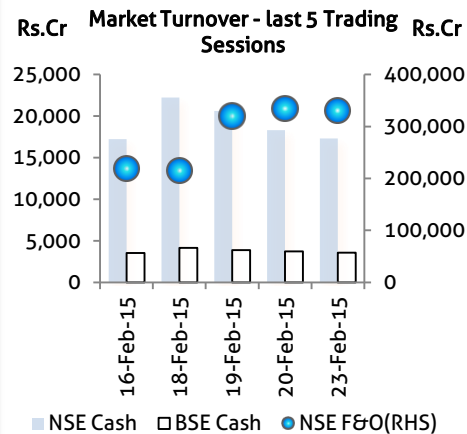
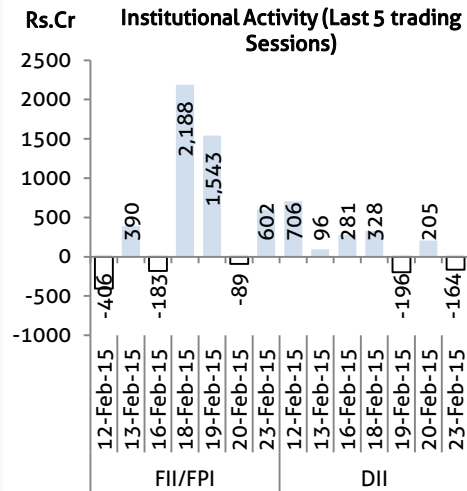
- ❖ Vegetable prices jumped upto 100 per cent so far this month in local market here on reduced supply from state farmers due to acute shortage of water for irrigation. Sudden rise in temperature has also caused damage to harvested crop while on transit in vehicles. (BS)
- ❖ Government sought to allay apprehensions on the Land Acquisition ordinance saying even farmers whose land was acquired for critical projects like atomic energy, petroleum and highways will also get compensation. (BS)
- ❖ Facing a worldwide probe for alleged lapses at its Swiss unit, HSBC said its revenue and profits rose in India last year even as it reported a 17% fall in global profits for 2014. (BS)
- ❖ The ongoing coal block e-auctions will likely fetch Rs 1.47 lakh crore and boost job creation, mining tycoon Anil Agarwal, who heads Vedanta Resources, said Monday. (BS)
- ❖ President Pranab Mukherjee said India has emerged as the fastest growing large economy with an estimated 7.4% growth rate in 2014-15 and the government is taking "decisive measures" to ensure a better future for the people. (BS)
- ❖ Global rating agency Standard & Poor's said India's low income levels and weak fiscal and debt indicators constrain the country's credit profile. (BS)
- ❖ Stressing the need to boost clean energy generation, President Pranab Mukherjee said that the share of renewable power generation will be enhanced to 15% of the total energy mix in the next seven years. (BS)
- ❖ Food, fuel and fertiliser: These three subsidies have been a recurring nightmare for Indian finance ministers trying to present a balanced budget. (BS)
- ❖ The Modi government has reached out to the states to pass the Mines and Minerals (Development and Regulation) (MMDR) Amendment Ordinance, 2015 in the Budget session, but it might not be easy going. (BS)

## Domestic News

- ❖ Car market leader Maruti Suzuki launched refreshed version of its popular compact sedan Dzire with introductory prices ranging from Rs 5.07 lakh to Rs 7.81 lakh (ex-showroom Delhi). (BS)
- ❖ Daimler Trucks has said that sales of BharatBenz trucks rose by 59% to 10,300 vehicles as compared to 6,500 units in India. The truck major attributed the increase to expansion of the product portfolio by five more models and the growth of the dealer network to about 80 operations. (BS)
- ❖ Zee Media Corporation has received capital market regulator Sebi's approval to raise up to Rs 200 crore through rights issue. (BS)
- ❖ Non-banking financial services arm of Edelweiss group, ECL Finance, announced a Rs 800 crore public issue of secured redeemable non-convertible debentures, which will hit the markets on February 26. (BS)
- ❖ Private equity (PE) investment in the realty sector jumped over two-fold to Rs 15,410 crore last year, the highest since 2008, signalling a renewed interest by domestic and global investors in the Indian real estate, according to property consultant Cushman & Wakefield. (BS)

| Global Forex | Closing | Chg      | % Chg  |
|--------------|---------|----------|--------|
| EUR-USD      | 1.1328  | (0.0007) | (0.06) |
| GBP-USD      | 1.5435  | (0.0022) | (0.14) |
| USD-JPY      | 119.09  | 0.28     | 0.24   |

| Bond Markets   | Closing | Chg       |
|----------------|---------|-----------|
| 10-yr bond     | 7.70    | 0.10 bps  |
| Interbank call | 7.84    | 20.09 bps |



## Domestic News (Cont...)

❖ In a bid to boost fixed line phone connections in the country, telecom regulator Trai removed charges that a landline service provider has to pay to the other service providers for transmitting its customers' phone calls - a move that is likely to lead to lower tariffs. (BS)

❖ Research and rating agency ICRA has maintained the subdued revenue growth outlook for the hotel industry over the next 12 months with an expectation of 5-8% growth in revenues by end of this financial year. (BS)

❖ Non-convertible debentures (NCD) seem to be emerging as the preferred fund-raising option for companies as they have lined up plans to raise more than Rs 1,350 crore through this route. (BS)

❖ Drug major Lupin has received approval to market its generic bimatoprost ophthalmic solution in the US market. (BS)

❖ Budget carrier SpiceJet is expected to receive the second tranche of Rs 400 crore of a Rs 1,500 crore fund infusion by new investors led by Ajay Singh by Wednesday. (BS)

❖ Chennai-based truck and bus maker Ashok Leyland has not given up on its maiden car venture, for which it piggybacked on Japanese giant Nissan, despite extremely poor sales. (BS)

❖ Lupin said on Monday that the US Food and Drug Administration (FDA) has raised concerns over production processes at the company's Pithampur plant in central India. (BS)

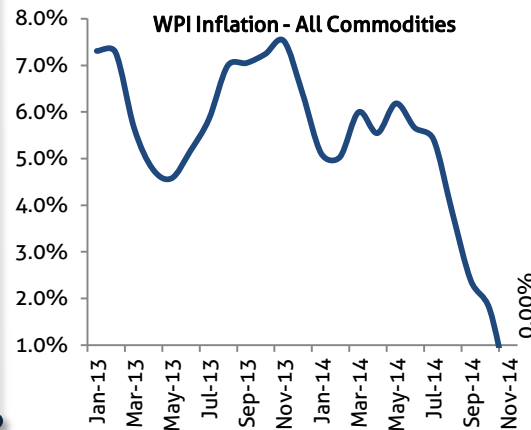
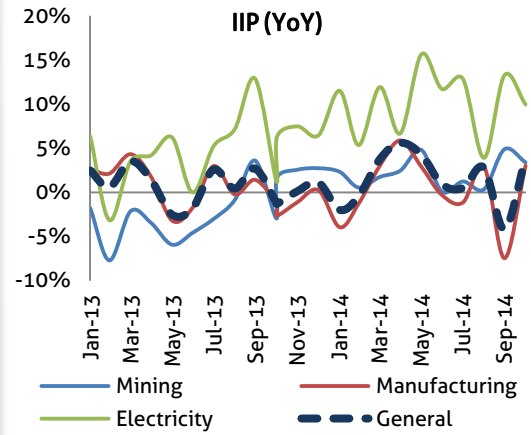
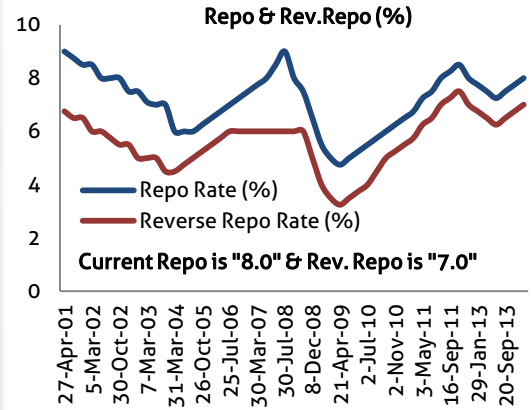
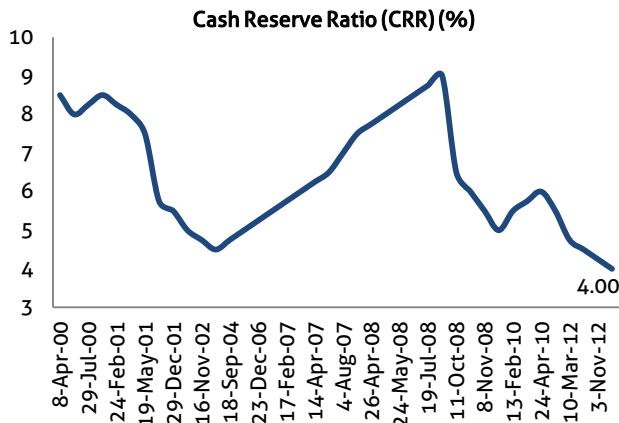
❖ Travel firm Thomas Cook India has signed an agreement with Global Distribution Systems provider Amadeus. (BS)

❖ Mumbai-based Mahindra & Mahindra launched a new premium variant of the XUV500 priced at Rs 14.48 lakh (ex-showroom, Mumbai). (BS)

❖ Sterlite Grid Limited, a subsidiary of Sterlite Technologies Limited has refinanced project loan for India's first 'Ultra Mega Transmission' project - East North Interconnection Company Limited [ENICL] within three months of the project becoming fully operational in November 2014. (BS)

❖ The country's largest lender, State Bank of India, plans to overhaul its transaction banking business, which will include involving trade finance and IT platform-based services for liquidity management. (BS)

❖ GMR Infrastructure said that it has entered into a definitive agreement to sell its 26% stake in Delhi CargoService Centre. (BS)



## Bulk Deal - NSE

| Date      | Security Name             | Client Name                                | Buy/Sell | Traded Qty. | Price |
|-----------|---------------------------|--|----------|-------------|-------|
| 23-Feb-15 | PC Jeweller Ltd           | IDRIA LIMITED                              | BUY      | 4479322     | 244.4 |
| 23-Feb-15 | GVK Power & Infrastructur | VERTEX PROJECTS LIMITED                    | BUY      | 49287340    | 10.2  |
| 23-Feb-15 | Taj GVK Hotels & Resorts  | G INDIRA KRISHNA REDDY                     | BUY      | 2583702     | 74.3  |
| 23-Feb-15 | Simplex Infrastructures L | CITIGROUP GLOBAL MARKETS MAURITIUS PVT LTD | SELL     | 283523      | 427.5 |
| 23-Feb-15 | Titagarh Wagons Limited   | N.K. SECURITIES                            | SELL     | 148323      | 697.4 |

## Bulk Deal - BSE

| Date      | Security Name | Client Name                                | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|--|----------|-------------|-------|
| 23-Feb-15 | SIMPLEXINF    | CITIGROUP GLOBAL MARKETS MAURITIUS PVT LTD | S        | 283,500     | 427.5 |
| 23-Feb-15 | MAFATIND-\$   | MINAL BHARAT PATEL                         | B        | 290,000     | 206.3 |
| 23-Feb-15 | CGCL          | MONEY MATTERS (INDIA) PRIVATE LIMITED      | B        | 235,000     | 180.0 |
| 23-Feb-15 | EXCAST        | AMIT PALA                                  | B        | 452,252     | 39.4  |
| 23-Feb-15 | MITL          | ELEVATOR BUILDERS PRIVATE LIMITED          | B        | 582,717     | 17.6  |

## Corporate Actions

| Scrip Code | Scrip Name   | Ex-Date   | Purpose                            | Record Date |
|------------|--------------|-----------|------------------------------------|-------------|
| 506197     | BLISSGVS     | 24-Feb-15 | Interim Dividend - Rs.0.20         | 25-Feb-15   |
| 531344     | CONCOR       | 24-Feb-15 | Interim Dividend - Rs.8.00         | 25-Feb-15   |
| 522295     | CONTROLPR-\$ | 24-Feb-15 | Interim Dividend - Rs.2.00         | 25-Feb-15   |
| 522073     | HITECHGEAR   | 24-Feb-15 | Interim Dividend - Rs.1.00         | 25-Feb-15   |
| 535043     | IDFCYDS3D    | 24-Feb-15 | Temporary Suspension               | 25-Feb-15   |
| 535042     | IDFCYDS3G    | 24-Feb-15 | Temporary Suspension               | 25-Feb-15   |
| 535041     | IDFCYRS3D    | 24-Feb-15 | Temporary Suspension               | 25-Feb-15   |
| 535040     | IDFCYRS3G    | 24-Feb-15 | Temporary Suspension               | 25-Feb-15   |
| 524816     | NATCOPHARM   | 24-Feb-15 | Interim Dividend - Rs.5.00         | 25-Feb-15   |
| 520151     | SHREYAS      | 24-Feb-15 | Interim Dividend - Rs.0.70         | 25-Feb-15   |
| 537668     | TFM460A      | 24-Feb-15 | Dividend On Mutual Fund            | 25-Feb-15   |
| 537668     | TFM460A      | 24-Feb-15 | Redemption of Mutual Fund          | 25-Feb-15   |
| 537666     | TFM460B      | 24-Feb-15 | Redemption of Mutual Fund          | 25-Feb-15   |
| 537665     | TFM460C      | 24-Feb-15 | Dividend On Mutual Fund            | 25-Feb-15   |
| 537665     | TFM460C      | 24-Feb-15 | Redemption of Mutual Fund          | 25-Feb-15   |
| 537667     | TFM460D      | 24-Feb-15 | Redemption of Mutual Fund          | 25-Feb-15   |
| 511395     | BALATECGL    | 25-Feb-15 | Stock Split from Rs.10/- to Re.1/- | 26-Feb-15   |
| 520008     | RICOAUTO     | 25-Feb-15 | Interim Dividend - Rs.1.00         | 26-Feb-15   |
| 523269     | ADVANIHOTR   | 26-Feb-15 | Interim Dividend - Rs.0.30         | 27-Feb-15   |
| 500039     | BANCOINDIA   | 26-Feb-15 | Interim Dividend - Rs.0.50         | 27-Feb-15   |
| 524332     | BCL-\$       | 26-Feb-15 | Interim Dividend - Rs.0.60         | 27-Feb-15   |
| 504369     | GRANDMA      | 26-Feb-15 | Stock Split from Rs.10/- to Re.1/- | 27-Feb-15   |

## Global Economic Calendar

| Date      | Curr. | Event                                      | Actual | Forecast | Previous |
|-----------|-------|--|--------|----------|----------|
| Time      | Cur.  | Event                                      | Actual | Forecast | Previous |
| 23-Feb-15 | USD   | Existing Home Sales (Jan)                  |        | 5.03M    | 5.04M    |
| 23-Feb-15 | USD   | Dallas Fed Mfg Business Index (Feb)        |        |          | -4.4     |
| 24-Feb-15 | EUR   | CPI (MoM) (Jan)                            |        | -1.60%   | -0.10%   |
| 24-Feb-15 | USD   | S&P/CS HPI Composite - 20 s.a. (MoM) (Dec) |        | 0.80%    | 0.70%    |
| 24-Feb-15 | USD   | CB Consumer Confidence (Feb)               |        | 100      | 102.9    |
| 25-Feb-15 | CNY   | HSBC Manufacturing PMI (Feb)               |        |          | 49.7     |
| 25-Feb-15 | USD   | MBA 30-Year Mortgage Rate                  |        |          | 3.93%    |
| 25-Feb-15 | USD   | New Home Sales (Jan)                       | 487K   |          | 481K     |
| 26-Feb-15 | GBP   | GDP (YoY) (Q4)                             |        | 2.70%    | 2.70%    |
| 26-Feb-15 | EUR   | Business Climate (Feb)                     |        | 0.2      | 0.2      |
| 26-Feb-15 | EUR   | Consumer Confidence (Feb)                  |        | -7       | -8.5     |
| 26-Feb-15 | EUR   | Industrial Sentiment (Feb)                 |        | -5       | -5       |
| 26-Feb-15 | USD   | CPI (MoM) (Jan)                            |        | -0.50%   | -0.40%   |
| 26-Feb-15 | USD   | Durable Goods Orders (MoM) (Jan)           |        | 2.00%    | -3.30%   |
| 26-Feb-15 | USD   | House Price Index (MoM) (Dec)              |        |          | 0.80%    |
| 26-Feb-15 | USD   | KC Fed Manufacturing Index (Feb)           |        |          | -2       |
| 26-Feb-15 | USD   | Initial Jobless Claim                      |        |          |          |
| 27-Feb-15 | JPY   | Household Spending (YoY) (Jan)             |        | -4.10%   | -3.40%   |
| 27-Feb-15 | JPY   | Tokyo CPI (YoY) (Feb)                      |        |          | 2.30%    |
| 27-Feb-15 | JPY   | Unemployment Rate (Jan)                    |        | 3.40%    | 3.40%    |
| 27-Feb-15 | JPY   | Industrial Production (MoM) (Jan)          |        | 2.70%    | 0.80%    |
| 27-Feb-15 | GBP   | GfK Consumer Confidence (Feb)              |        | 2        | 1        |
| 27-Feb-15 | JPY   | Housing Starts (YoY) (Jan)                 |        | -11.30%  | -14.70%  |
| 27-Feb-15 | USD   | GDP (QoQ) (Q4)                             |        | 2.10%    | 2.60%    |
| 27-Feb-15 | USD   | Real Consumer Spending (Q4)                |        |          | 4.30%    |
| 27-Feb-15 | USD   | Chicago PMI (Feb)                          |        | 58.5     | 59.4     |
| 27-Feb-15 | USD   | Michigan Consumer Sentiment (Feb)          |        | 96.5     | 93.6     |
| 27-Feb-15 | USD   | Pending Home Sales (MoM) (Jan)             |        |          | -3.70%   |

## Indian Economic Calendar

| Date      | Curr. | Event                             | Actual | Forecast | Previous  |
|-----------|-------|-----------------------------------|--------|----------|-----------|
| 27-Feb-15 | INR   | Federal Fiscal Deficit (Jan)      |        |          | 5,323.81B |
| 27-Feb-15 | INR   | Infrastructure Output (YoY) (Jan) |        |          | 2.40%     |

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