

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7493	(0.24)	CNX IT	9548	(1.57)
Sensex	25031	(0.30)	BANK NIFTY	15076	0.52
DowJones	16937	(0.06)	S&P CNX 500	6038	(0.01)
Nasdaq	4369	0.01	CNX FMCG	17114	(3.94)
Hangseng	22856	0.22	CNX REALTY	3715	1.16
Shanghai	2027	0.12	CNX AUTO	6652	0.72
Nikkei	15313	(0.36)	CNX ENERGY	9965	1.08
Strait Times	3260	0.07	CNX PHARMA	8082	0.48
Kospi	1993	0.94	Advances / Declines	BSE	NSE
Taiwan	9269	0.44	Advances	1562	774
FTSE	6801	(0.36)	Declines	1387	734
CAC	4516	(0.57)	Unchanged	124	64
DAX	9921	(0.66)	Total	3073	1572

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ONGC	439.50	5.27
JINDALSTEL	328.00	2.95
BHEL	245.40	2.76
ACC	1475.00	2.53
HEROMOTOCO	2579.95	2.34

Nifty Losers		
Company	Price(Rs)	Chg(%)
ITC	317.50	(5.42)
KOTAKBANK	893.95	(3.96)
MCDOWELL-N	2588.00	(3.44)
INFY	3231.45	(2.57)
HCLTECH	1414.00	(2.07)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
APL Apollo Tubes	7.48	0.1	112
Mahindra Ugine	1.96	0.1	15
Prime Focus	33.89	2.8	12
Astrazeneca Phar	0.45	0.0	12
MAHINDCIE	4.98	0.4	11

Indian Forex	Closing	Chg	% Chg
USD/INR	60.193	(0.086)	(0.14)
GBP/INR	102.562	(0.207)	(0.20)
EUR/INR	81.907	(0.214)	(0.26)
JPY/INR	59.050	(0.120)	(0.20)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28288	402
Silver (Rs/1kg)	44380	135

Commodities	Price	% Chg.
Crude (US\$/BBL)	105.7	(1.09)
Brent (US\$/BBL)	113.9	(0.78)
Gold (US/oz)	1317.3	0.05
Silver (US\$/oz)	20.9	(0.43)
Copper (US\$/MT)	6901.0	1.82
Alum (US\$/MT)	1857.0	0.65
Zinc(US\$/MT)	2183.0	0.74

ADR	Cl. Values	% Chg.
ICICI Bank	49.91	0.93
HDFC Bank	47.13	0.68
Infosys	53.47	(1.14)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	40.89	0.30
Wipro	11.40	(0.23)
Tata Motors	39.02	0.16

Market Sensor

US market ended little changed on Monday, with the Dow Jones Industrial Average halting its longest win streak this year. Dow Jones Industrial Average was down 0.06% or 9.82 points at 16937.26. Nasdaq Composite was up 0.01% or 0.64 points at 4368.68. Standard & Poor's 500 was down 0.01% or 0.26 points at 1962.61.

Indian Equity market ended on a negative note as concern of higher crude oil price and geo political tension in Iraq continues followed by delay in monsoon continues to impact the market negatively. Nifty ended the previous trading session with a decline of 0.24% or 18.10 points at 7493.35. On Monday's trading session, FII's sold net Rs.214.49 Cr in cash market and sold net Rs.343.95 in derivative segment. Whereas, DII bought net Rs.117.43 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7490 followed by 7450 while resistance is seen at 7590 followed by 7635.

Global News

❖The Philippines is considering easing rice-import curbs as Asia's second-biggest buyer battles record-high domestic prices and seeks to limit losses at a state agency, Economic Planning Secretary Arsenio Balisacan said. (Bloomberg)

❖U.S. Treasury Secretary Jacob J. Lew will announce expanded programs to help struggling mortgage borrowers on June 26, marking the fifth anniversary of government efforts to aid the real-estate market, the Treasury Department said. (Bloomberg)

❖Americans snapped up previously owned homes in May in the biggest monthly sales gain in almost three years, a sign the residential real estate market is regaining its footing after a stumble early in the year. (Bloomberg)

❖Purchases of previously owned U.S. homes rose more than projected in May, a sign the industry is stabilizing after a weather-depressed quarter. (Bloomberg)

❖Tanzania's government expects the size of the economy to increase by 20 percent after rebasing the country's gross domestic product data to factor in expanding industries such as mining and natural gas. (Bloomberg)

Economic News

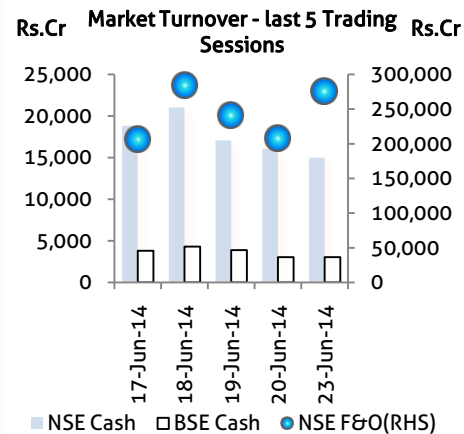
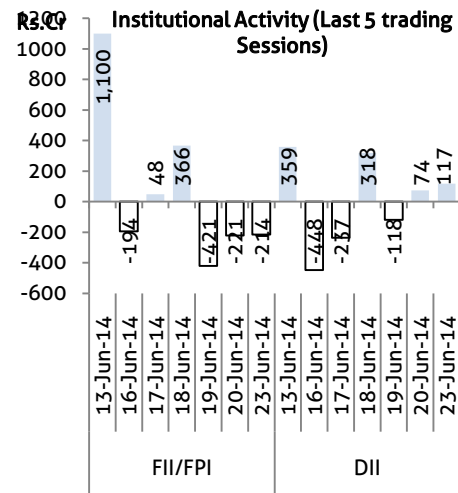
- ❖ An assessment of the Planning Commission by the Independent Evaluation Office has found the plan body exceeds the scope of its authority by acting as a "control commission", particularly its influence on the allocation of funds to the state governments even though it was set up in 1950 by a Cabinet Resolution as a mere recommending body. (BS)
- ❖ The West Bengal government has decided to form a committee consisting of three senior ministers to look into the problems of the jute sector in the state, according to jute industry veteran Sanjay Kajaria. (BS)
- ❖ In a move that could lead to rise in the price of sugar, the government decided to hike the import duty on it and to provide an additional interest-free loan of upto Rs 4,400 crore to pay dues to cane growers. (BS)
- ❖ Officials of the finance and the commerce and industry ministries are scheduled to discuss various issues related to Bilateral Investment Promotion and Protection Agreement (BIPA) including the revised model of the pact tomorrow. (BS)
- ❖ Implementation of goods and services (GST) tax could help government raise tax revenues and reduce fiscal deficit, which has been around 4.5% in the last three years, a CRISIL report said. (BS)
- ❖ The Power Ministry wants a review of a proposal to impose anti-dumping duty on imports of solar gear because the country does not have sufficient capacity to make equipment to harness the sun's energy. (BS)
- ❖ Uttar Pradesh government has put sugar mills on a week's notice over massive cane arrears of over Rs 7,500 crore for 2013-14 crushing season. (BS)
- ❖ The Coal Ministry has asked Central Coalfields Ltd, a CIL subsidiary, to provide details of its 14 projects that are awaiting clearances, including those pertaining to environment and forest. (BS)
- ❖ The government's decision to hike passenger rail fares and freight rates may end up pushing up inflation by up to 50 basis points. Poor rains may have a further adverse impact on inflation, according to a Bank of America Merrill Lynch India Economic Watch report dated June 23rd. (BS)
- ❖ India produced just a little over seven million tonnes (MT) of steel, accounting for five% of the global output of 141 MT in May, World Steel Association (WSA) has said. (BS)
- ❖ The Budget session of Parliament will be held from July 7 to August 14 and the first General Budget of the Narendra Modi government will be presented on July 10. (BS)

Domestic News

- ❖ At least 17 people were injured after clashes between the workers and the security personnel of Tata Steel at its Kalinganagar plant. (BS)
- ❖ Adani Ports and Special Economic Zone (APSEZ) said it has completed the acquisition of Dhamra Port in Odisha from Tata Steel and L&T Infrastructure Development Projects (L&T IDPL). (BS)
- ❖ Videocon Telecom has given its employees a big reason to smile. The Telco has announced best-in-industry increments going up to 38% for its employees in the current financial year, with the average fixed raise being 11% and rest coming in form of bonus which will be in addition to the Performance Linked Incentive (PLI). (BS)

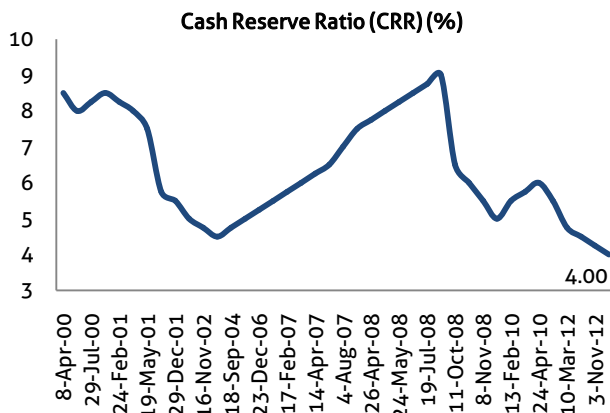
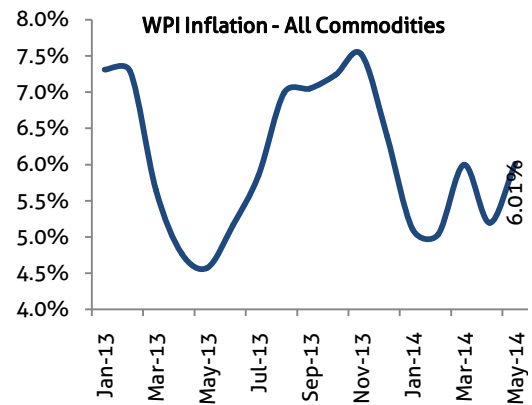
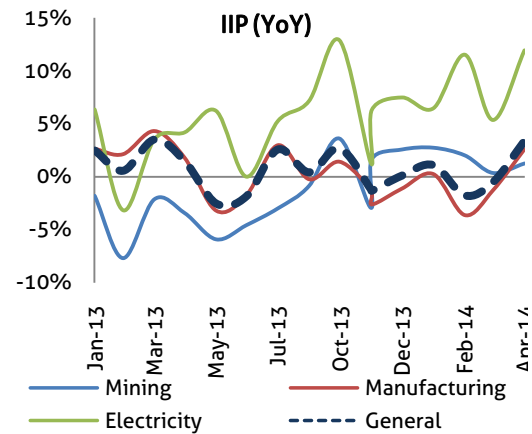
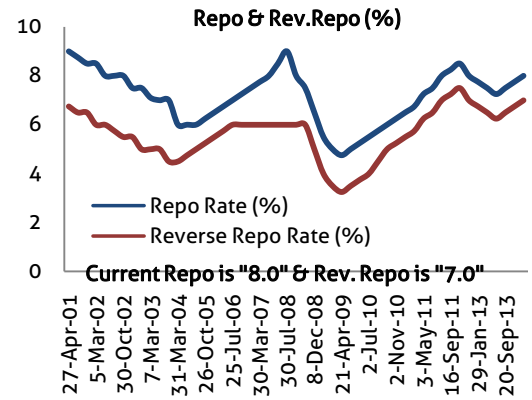
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3594	(0.0011)	(0.08)
GBP-USD	1.7021	(0.0006)	(0.04)
USD-JPY	101.87	(0.06)	(0.06)

Bond Markets	Closing	Chg
10-yr bond	8.79	5.1 bps
Interbank call	8.06	9.0 bps



Domestic News (Cont...)

- ❖ Vodafone India has doubled its mobile Internet rates for 2G and 3G customers across the country, and it is being implemented in a phased manner. (BS)
- ❖ Indian aerospace major HAL said the company has strengthened its human resource by inducting over 400 young officers. (BS)
- ❖ A senior level delegation from the International Coal Ventures (ICVL) is currently touring Mozambique to assess some of the coal assets which are currently under its radar for acquisition. (BS)
- ❖ Tata Advanced Systems Ltd (TASL) has tied up with Europe's RUAG Aviation to manufacture crucial systems for the latter's Dornier 228 NG aircraft. (BS)
- ❖ Multi Screen Media India PVT Ltd's film production arm MSM Motion Pictures will be joining hands with Saraswati Entertainment Creations Limited (SECL) and Shoojit Sircar and Ronnie Lahiri's Rising Sun Films for their next feature film 'Piku'. (BS)
- ❖ Bharti Airtel said it is likely to become the world's third largest telecom operator soon, after China Mobile and UK-based Vodafone, as it continues with a strong subscriber growth. (BS)
- ❖ Kick starting the process of 5% stake sale in SAIL, the Disinvestment Department held meeting with merchant bankers and steel ministry officials to move ahead with it. (BS)
- ❖ Electrical goods maker Arise India is targeting 24% growth in turnover at Rs 1,550 crore in this fiscal as it is expanding products range. (BS)
- ❖ Electrical goods manufacturer Havells India is planning subdivision of its equity shares for which it will seek board approval next week. (BS)
- ❖ The Tata Group said it aims to bring out a fully built aircraft for Ruag Aviation - makers of Dornier 228 new generation aircraft, parts of which are to be made in India by TASL. (BS)
- ❖ Reliance Industries Ltd is expected to invest Rs 30,000 crore, of the total Rs 70,000 crore announced, in its telecom arm Reliance Jio Infocomm over the next two years, credit rating firm Moody's said. (BS)
- ❖ Telecom major Bharti Airtel has signed a definitive agreement with Loop Mobile to acquire the latter's operations in Mumbai. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
23-Jun-14	Ganesh Housing Corp Ltd	JANPATH MARKETING PVT LTD	SELL	341289	180.0
23-Jun-14	Apl Apollo Tubes Ltd	SAROJ RANI GUPTA	SELL	161360	270.1
23-Jun-14	Arvind Remedies Limited	ARYAMAN COMMERCE PVT LTD	SELL	400000	39.5
23-Jun-14	Rushil Decor Limited	RAJVI JAYENDRABHAI SHAH	SELL	148715	65.5
23-Jun-14	Dr. Datson's Labs Ltd	HESHIKA GROWTH FUND (FCCB)	SELL	349122	16.2

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
23-Jun-14	APL Apollo Tubes	SAROJ RANI GUPTA	S	315,000	270.1
23-Jun-14	STAMPEDE	AJAY MULTI PROJECTS LIMITED	B	198,965	123.8
23-Jun-14	BLAZON MARBL	KAILASH FICOM LTD	S	853,768	19.9
23-Jun-14	Valson Inds-\$	LALIT NANAKCHAND MUTREJA	S	657,100	15.1
23-Jun-14	Naisargik Agri	SNOWGOLD IMPEX PRIVATE LIMITED	B	56,000	149.9

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532859	Hinduja Glob	24-Jun-14	Final Dividend - Rs.10.00	-
513010	Tata Sponge	24-Jun-14	Dividend - Rs.10.00	-
509945	Thacker & Co	24-Jun-14	Stock Split from Rs.5/- to Re.1/-	25-Jun-14
532505	Uco Bank	24-Jun-14	Final Dividend - Rs.1.00	-
522275	Alstom T&D	25-Jun-14	Dividend - Rs.1.80	-
513353	Cochin Mnrl-\$	25-Jun-14	Dividend - Rs.1.00	-
523405	JM Financial-\$	25-Jun-14	Final Dividend - Rs.0.55	-
533289	Kesar Terminals	25-Jun-14	Final Dividend - Rs.1.50	-
511218	Shriram Trans	25-Jun-14	Final Dividend - Rs.4.00	-
506105	Stanrose Mafat	25-Jun-14	Dividend - Rs.6.00	-
532051	SWELECT-\$	25-Jun-14	Final Dividend - Rs.9.00	-
504387	ELF Trading	26-Jun-14	Final Dividend - Rs.2.00	-
517354	Havells India	26-Jun-14	Final Dividend - Rs.10.00	-
500116	IDBI Bank	26-Jun-14	Final Dividend - Rs.0.28	-
500304	NIIT	26-Jun-14	Dividend - Rs.1.60	-
532541	NIIT Tech	26-Jun-14	Dividend - Rs.9.00	-
531626	Orosil Smiths-\$	26-Jun-14	Stock Split from Rs.10/- to Rs.5/-	28-Jun-14
526849	Banaras Beads	27-Jun-14	Dividend - Rs.2.00	-
500096	Dabur India	27-Jun-14	Final Dividend - Rs.1.00	-
531209	Nucleus Soft	27-Jun-14	Special Dividend - Rs.3.00	-
531209	Nucleus Soft	27-Jun-14	Special Dividend - Rs.3.00	-
531209	Nucleus Soft	27-Jun-14	Final Dividend - Rs.3.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
23-Jun-14	CNY	Chinese HSBC Manufacturing PMI		49.7	49.4
23-Jun-14	EUR	Manufacturing PMI		52.2	52.2
23-Jun-14	EUR	Services PMI		53.3	53.2
23-Jun-14	USD	Chicago Fed National Activity			-0.32
23-Jun-14	USD	Existing Home Sales		4.73M	4.65M
24-Jun-14	USD	House Price Index (MoM)			0.70%
24-Jun-14	USD	S&P/CS HPI Composite - 20 (YoY)		11.50%	12.40%
24-Jun-14	USD	CB Consumer Confidence		83.5	83
24-Jun-14	USD	New Home Sales		440K	433K
24-Jun-14	USD	Richmond Manufacturing Index			7
25-Jun-14	USD	MBA 30-Year Mortgage Rate			4.36%
25-Jun-14	USD	Durable Goods Orders (MoM)		0.20%	0.60%
26-Jun-14	GBP	Current Account			-22.4B
26-Jun-14	GBP	GDP (YoY)			3.10%
26-Jun-14	USD	Continuing Jobless Claims		2,570K	2,561K
26-Jun-14	USD	Core PCE Price Index (MoM)		0.20%	0.20%
26-Jun-14	USD	Initial Jobless Claims		310K	312K
26-Jun-14	USD	Personal Spending (MoM)		0.40%	-0.10%
26-Jun-14	USD	KC Fed Manufacturing			10
27-Jun-14	JPY	Household Spending (YoY)		-2.00%	-4.60%
27-Jun-14	JPY	National Core CPI (YoY)		3.40%	3.20%
27-Jun-14	JPY	Tokyo CPI (YoY)			3.10%
27-Jun-14	GBP	Current Account		-17.5B	-22.4B
27-Jun-14	GBP	GDP (YoY)		3.10%	3.10%
27-Jun-14	EUR	Consumer Confidence		-7	-7.1
27-Jun-14	EUR	Industrial Sentiment		-3	-3

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
25-Jun-14	INR	Indian M3 Money Supply			
27-Jun-14	INR	Indian Bank Loan Growth			

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