

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6584	1.36	CNX IT	9365	(0.14)
Sensex	22055	1.38	BANK NIFTY	12408	2.75
DowJones	16277	(0.16)	S&P CNX 500	5091	1.07
Nasdaq	4226	(1.18)	CNX FMCG	18089	0.51
Hangseng	21777	(0.32)	CNX REALTY	177	0.68
Shanghai	2073	0.34	CNX AUTO	5616	1.06
Nikkei	14418	(0.40)	CNX ENERGY	8124	2.21
Strait Times	3104	(0.24)	CNX PHARMA	7789	(0.61)
Kospi	1942	(0.21)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8654	0.56	Advances	1273	702
FTSE	6520	(0.56)	Declines	1557	758
CAC	4276	(1.36)	Unchanged	138	90
DAX	9189	(1.65)	Total	2968	1550

Nifty Gainers		
Company	Price(Rs)	Chg(%)
GAIL	371.05	5.29
ONGC	321.35	4.37
INDUSINDBK	491.30	4.20
KOTAKBANK	769.85	3.86
ICICIBANK	1240.85	3.57

Nifty Losers		
Company	Price(Rs)	Chg(%)
HCLTECH	1412.30	(1.81)
DRREDDY	2744.30	(1.30)
WIPRO	563.05	(1.16)
CIPLA	390.75	(1.03)
INFY	3275.60	(0.62)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Grindwell Nor-\$	2.58	0.02	112
Asahi India	20.75	0.23	90
Gateway Distr	34.25	0.38	89
CCL Products	37.32	1.28	29
Redington India	22.15	1.48	15

Indian Forex	Closing	Chg	% Chg
USD/INR	60.703	(0.343)	(0.56)
GBP/INR	100.105	(0.701)	(0.70)
EUR/INR	83.807	(0.368)	(0.44)
JPY/INR	59.260	(0.380)	(0.64)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29440	(358)
Silver (Rs/1kg)	44095	(905)

Commodities	Price	% Chg.
Crude (US\$/BBL)	99.4	(0.09)
Brent (US\$/BBL)	106.6	(0.34)
Gold (US/oz)	1313.7	(1.67)
Silver (US\$/oz)	20.0	(1.53)
Copper (US\$/MT)	6510.0	(0.45)
Alum (US\$/MT)	1688.5	0.69
Zinc(US\$/MT)	1942.0	(0.54)

ADR	Cl. Values	% Chg.
ICICI Bank	42.60	1.01
HDFC Bank	39.03	0.55
Infosys	53.32	(0.54)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	44.60	(0.30)
Wipro	13.02	(0.10)
Tata Motors	33.16	0.06

## Market Sensor

US market fell for a second session on Monday, with the Nasdaq especially hard hit as investors shed Facebook, Google and other high flyers. Dow Jones Industrial Average was down 0.16% or 26.08 points at 16276.69. Nasdaq Composite was down 1.18% or 50.40 points at 4226.39. Standard & Poor's 500 was down 0.49% or 9.08 points at 1857.44.

Indian equity market After conceding marginal w-o-w decline last week, bounced back to set another record high on closing basis. The rally of the market today was largely based on continuous FII buying in the last few weeks while firm Asian cues also somewhat boosted the market sentiment. Nifty ended the previous trading session with a gain of 1.36% or 88.60 points at 6583.50. On Monday's trading session, FIIs bought net Rs.1465.62 Cr in cash market and bought net Rs.59.40 in derivative segment. Whereas, DII sold net Rs.770.39 Cr in cash segment.

**Coming to today's trade day Nifty to remain volatile with positive bias with crucial intraday support exists at 6550 followed by 6500 while resistance is seen at 6600 followed by 6660**

## Global News

❖The world's top industrial powers threatened further sanctions to deter Russian President Vladimir Putin from taking over other parts of Ukraine and suspended Russia from participating in the Group of Eight. (Bloomberg)

❖Brazil's credit rating was cut by Standard & Poor's, which said sluggish economic growth and an expansionary fiscal policy are fueling an increase in the country's debt levels. (Bloomberg)

❖The world's leading industrial powers threatened further sanctions to deter the Kremlin from invading other parts of Ukraine and boycotted what was to be a Group of Eight summit hosted by President Vladimir Putin. (Bloomberg)

❖Growth in euro-area manufacturing and services stayed close to the fastest since 2011 in March as France improved, providing further evidence that the region's recovery is on track. (Bloomberg)

❖The Markit Economics preliminary index of U.S. manufacturing decreased to 55.5 in March from 57.1 a month earlier, the London-based group said. (Bloomberg)

## Economic News

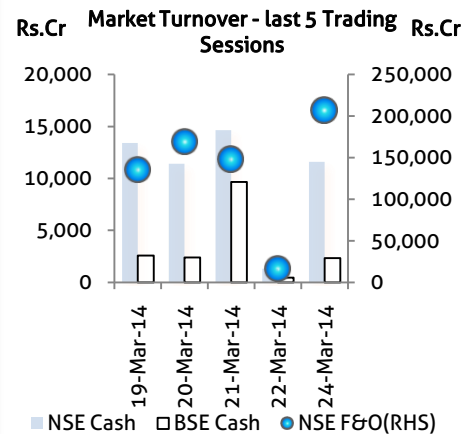
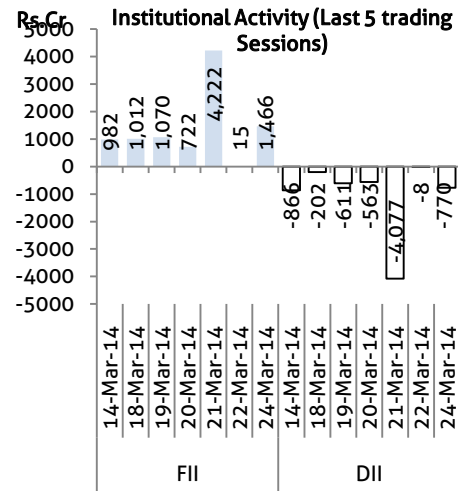
- ❖ In order to ensure transparency in the disinvestment process, Finance Ministry has decided to appoint retired bureaucrats and prominent private sector executives as independent monitors to oversee working of merchant bankers and others associated with PSU stake sale. (BS)
- ❖ India's wind and solar energy financing policies are not as cost-effective as they could be, according to a joint study conducted by US-based think-tank Climate Policy Initiative (CPI) and Indian School of Business (ISB). (BS)
- ❖ For starters, the hailstorm is expected to adversely hit the current year's GDP too. Bank of America Merrill Lynch's Jyotivardhan Jaipuria and Indranil Sen Gupta say: "The hailstorm could likely result in an estimated crop failure at about Rs 12,000 crore (0.1% of the full year GDP). (BS)
- ❖ Exuding confidence that growth will improve in the coming months, the Finance Ministry said economy has stabilised which is evident from the strengthening of the stock markets as well as the rupee. (BS)
- ❖ The Commission for Agricultural Costs and Practices (CACAP) has recommended moderate increase of 1-5% in minimum support prices (MSP) of agricultural commodities for ensuing Kharif season 2014-15. (BS)
- ❖ A recent public notice issued by the Tuticorin Customs has created a concern among the trade at the Port City of Tuticorin, in the Southern part of Tamil Nadu. (BS)
- ❖ India's hope rally appears to be at risk. Even if a reformist government comes to power in May, global weather forecasts seem to suggest that it will be faced with the prospect of a weak agriculture output and rise in food prices. (BS)
- ❖ Unseasonal rains and hailstorms this month have damaged the winter-sown crops of millions of Indian farmers, but Rekha Garole lost more than others. (BS)

## Domestic News

- ❖ Seeking to expand in nutraceutical segment, Anil Bioplus Ltd (ABL) will invest Rs 150 crore in a Greenfield plant at Halol near Vadodara in Gujarat to increase production of calcium and sodium gluconates. Anil Bioplus Ltd is a venture of Anil Group of Companies based in Ahmedabad. (BS)
- ❖ AirAsia group chief executive Tony Fernandes openly admitted that there could be cannabisation between his JV for low cost airline operations and the joint venture between Tata and SIA in India which will offer a full service operations. Air Asia is also in a JV with the the Tatas. (BS)
- ❖ Jubilant Chemsys, a wholly-owned subsidiary of Jubilant Life Sciences, announced an extension of collaborative partnership with Infectious Disease Research Institute (IDRI) for TB drug discovery. (BS)
- ❖ The Delhi High Court directed three discoms of Tata Power and Reliance ADAG to comply with its single judge's order and fully cooperate with the Comptroller and Auditor General (CAG) in the audit process. (BS)
- ❖ India proved its mettle in the world's diamond processing activities once again after gaining all five new Suppliers of Choice (SoC) popularly known as "sightholders" added to the existing list of 82 by De Beers, the conglomerate dominating the world's diamond mining and marketing operations. (BS)

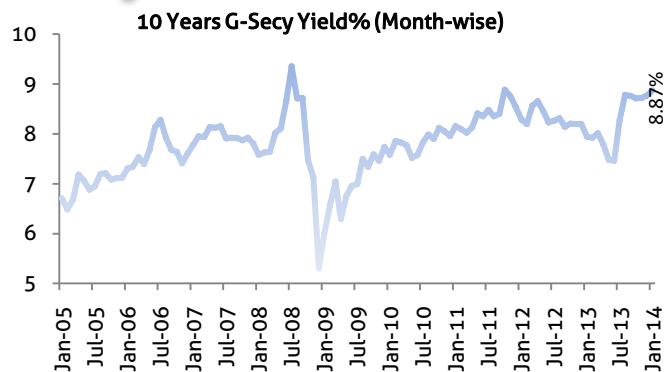
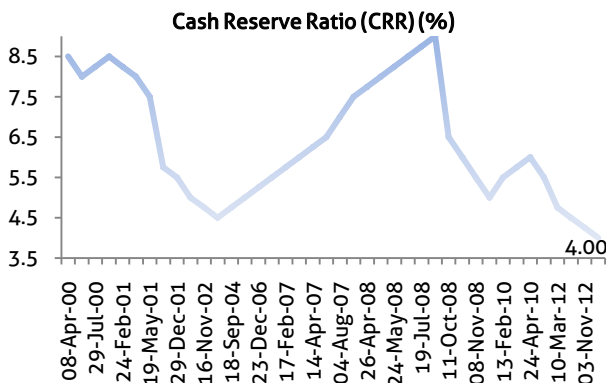
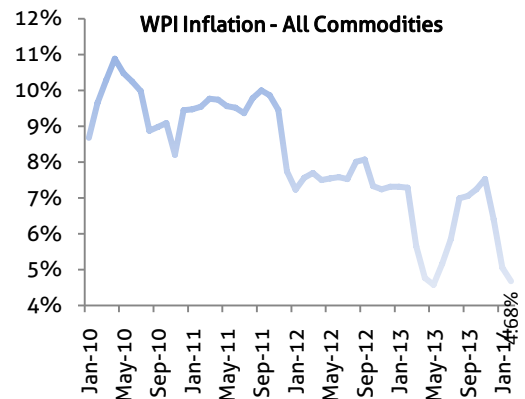
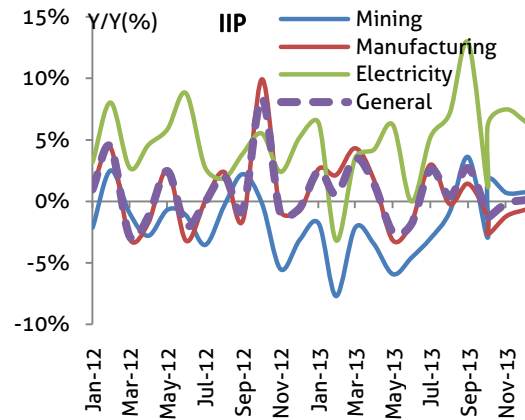
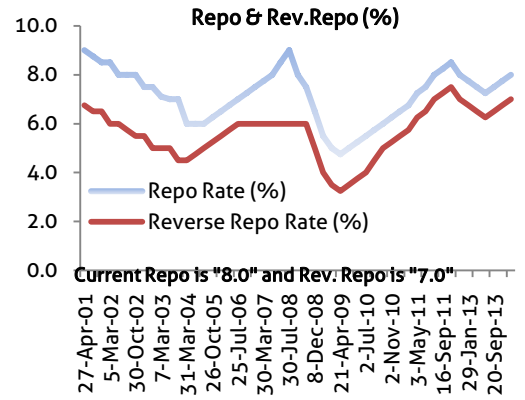
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3837	(0.0002)	(0.01)
GBP-USD	1.6498	0.0000	0.00
USD-JPY	102.22	(0.02)	(0.02)

Bond Markets	Closing	Chg
10-yr bond	9.02	-1.5 bps
Interbank call	8.89	10.0 bps



## Domestic News (Cont...)

- ❖ State-owned Engineers India Ltd (EIL) said it has won a \$40 million contract for the Liwa Plastics project of Oman Refineries and Petroleum Industries Co (Orpic). (BS)
- ❖ Tata Power's rights issue worth almost Rs 2,000 crore will open on March 31 and the proceeds will be utilised for capital expenditure and repaying debt. (BS)
- ❖ Electrical goods company Havells India has clocked turnover of almost Rs 625 crore in Uttar Pradesh during the current fiscal. (BS)
- ❖ Reliance Industries hit out at the AAP for asking the Election Commission to put on hold the gas price revision due from April 1, saying the party was indulging in "political disinformation" on implementation of a Cabinet decision taken before the polls were announced. (BS)
- ❖ The Indian Institute of Packaging (IIP), a national apex body set up in 1966 by the packaging and allied industries and the Union ministry of commerce, is constructing six towers in Mumbai, which would house academics, hostel and lab facilities, with a total outlay of Rs 250 crore, according to IIP director NC Saha. (BS)
- ❖ Leading bourse National Stock Exchange (NSE) has given its approval for transfer of 'specified therapeutic and investment' business of a Sun Pharma subsidiary into the parent company. (BS)
- ❖ Textile major Arvind has picked up 49% stake in Murjani group's stake in India business of global fashion brand Calvin Klein for around Rs 88 crore. (BS)
- ❖ GAIL announced that during the Gastech Conference being held in Seoul, South Korea, the company had signed a Memorandum of Understanding (MoU) with Chubu Electric Power Co., Inc., Japan (Chubu) on Friday. (BS)
- ❖ Owing to a global slowdown in demand coupled with stiff competition from cheaper bulk drugs from China, exports of active pharmaceutical ingredients (API) or bulk drugs from Gujarat has slowed down this fiscal, and is likely to register a dip of around 3% over last year. (BS)
- ❖ State-owned manganese producer MOIL is planning to spend about Rs 40 crore on prospecting 11 blocks, involving an area of 597.44 hectares in Nagpur and Bhandara districts of Maharashtra. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
24-Mar-14	Rolta India Ltd.	ROLTA LTD	BUY	1900000	74.0
24-Mar-14	DCM Shriram Limited	DCM SHRIRAM LIMITED	BUY	1207132	90.0
24-Mar-14	CCL Products (I) Ltd	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	SELL	2153838	42.5
24-Mar-14	Zuari Agro Chemicals Ltd	BIRLA EDUCATION TRUST	SELL	215000	130.0
24-Mar-14	Harita Seating Systems Li	THE INDIAMAN FUND (MAURITIUS) LTD	BUY	349962	73.7

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
24-Mar-14	Gateway Distr	PARAMESWARA HOLDINGS LTD	S	2,983,500	150.3
24-Mar-14	Asahi India	SANJAY LABROO	S	1,835,000	54.8
24-Mar-14	CCL Products	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	S	2,279,200	42.5
24-Mar-14	Gateway Distr	ICICI PRUDENTIAL INFRASTRUCTURE FUND	B	601,524	150.3
24-Mar-14	Chartered Cap	MOHIB NOMANBHAI KHERICHA	B	606,150	45.0

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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.0.50	27-Mar-14
513683	Neyveli Lignite	26-Mar-14	Interim Dividend - Rs.1.00	27-Mar-14
533106	OIL INDIA	26-Mar-14	2nd Interim Dividend - Rs.10.00	27-Mar-14
531092	Om Metals	26-Mar-14	Interim Dividend - Rs.0.10	27-Mar-14
537536	DENIS CHEM LAB LIMITED	27-Mar-14	Right2:1	29-Mar-14
505790	FAG Bearings	27-Mar-14	Dividend - Rs.6.00	-
531642	Marico	27-Mar-14	3rd Interim Dividend - Rs.-	01-Apr-14
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
533288	Claris Lifesciences	28-Mar-14	Buy Back of Shares	02-Apr-14
500166	Goodricke Group	28-Mar-14	Dividend - Rs.4.50	-
500830	Colgate Palmolive	02-Apr-14	3rd Interim Dividend - Rs.-	03-Apr-14
532992	CHL	03-Apr-14	Stock Split from Rs.10/- to Rs.2/-	05-Apr-14
500660	Glaxosmithkl Phar	03-Apr-14	Dividend - Rs.50.00	-
532191	State Bank Trav	09-Apr-14	Interim Dividend - Rs.-	10-Apr-14
500150	Foseco India	10-Apr-14	Special Dividend - Rs.12.50	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
24-Mar-14	CNY	Chinese HSBC Manufacturing PMI			48.5
24-Mar-14	EUR	Manufacturing PMI		53	53.2
24-Mar-14	USD	Chicago Fed National Activity			-0.39
24-Mar-14	USD	Manufacturing PMI		56	57.1
25-Mar-14	GBP	CPI (YoY)		1.80%	1.90%
25-Mar-14	GBP	PPI Input (MoM)		0.20%	-0.90%
25-Mar-14	GBP	RPI (MoM)		0.60%	-0.30%
25-Mar-14	USD	House Price Index (YoY)			7.70%
25-Mar-14	USD	S&P/CS HPI Composite - 20 (YoY)		13.00%	13.40%
25-Mar-14	USD	CB Consumer Confidence		79	78.1
25-Mar-14	USD	New Home Sales		450K	468K
25-Mar-14	USD	Richmond Manufacturing Index			-6
26-Mar-14	GBP	Current Account		-13.5B	-20.7B
26-Mar-14	GBP	GDP (YoY)		2.70%	2.70%
26-Mar-14	USD	MBA 30-Year Mortgage Rate			4.50%
26-Mar-14	USD	Durable Goods Orders (MoM)		0.50%	-1.00%
27-Mar-14	GBP	Retail Sales (YoY)		2.60%	4.30%
27-Mar-14	USD	GDP (QoQ)		2.70%	2.40%
27-Mar-14	USD	Initial Jobless Claims			
27-Mar-14	USD	Real Consumer Spending			2.60%
27-Mar-14	USD	Pending Home Sales (MoM)		0.10%	0.10%
27-Mar-14	USD	KC Fed Manufacturing			4
28-Mar-14	JPY	National CPI (YoY)			1.40%
28-Mar-14	JPY	Tokyo CPI (YoY)			1.10%
28-Mar-14	JPY	Unemployment Rate		3.70%	3.70%
28-Mar-14	GBP	GfK Consumer Confidence		-6	-7
28-Mar-14	EUR	Consumer Confidence		-13	-12.7
28-Mar-14	USD	Personal Income (MoM)		0.30%	0.30%
28-Mar-14	USD	Michigan Consumer Sentiment		80.7	79.9

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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