

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 7809 | (5.92) | CNX IT | 11455 | (4.80) |
| Sensex | 25742 | (5.94) | BANK NIFTY | 16812 | (6.90) |
| DowJones | 15871 | (3.58) | S&P CNX 500 | 6494 | (6.71) |
| Nasdaq | 4526 | (3.82) | CNX FMCG | 19742 | (4.65) |
| Hangseng | 21758 | 2.38 | CNX REALTY | 2958 | (7.33) |
| Shanghai | 3075 | (4.19) | CNX AUTO | 7773 | (7.26) |
| Nikkei | 18745 | 1.10 | CNX ENERGY | 7334 | (8.31) |
| Strait Times | 2911 | 2.38 | CNX PHARMA | 3485 | (6.73) |
| Kospi | 1858 | 1.56 | Advances / Declines | BSE | NSE |
| Taiwan | 7629 | 2.95 | Advances | 306 | 61 |
| FTSE | 5899 | (4.67) | Declines | 2486 | 1495 |
| CAC | 4383 | (5.35) | Unchanged | 52 | 46 |
| DAX | 9648 | (4.70) | Total | 2844 | 1602 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| | | |
| | | |
| | | |
| | | |
| | | |

| Nifty Losers | | |
|--------------|-----------|---------|
| Company | Price(Rs) | Chg(%) |
| VEDL | 80.55 | (14.85) |
| GAIL | 267.25 | (14.16) |
| TATASTEEL | 204.45 | (13.83) |
| CAIRN | 123.00 | (13.20) |
| PNB | 141.25 | (11.36) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| HEROMOTOCO | 2.63 | 0.3 | 10 |
| IOC | 21.74 | 2.5 | 9 |
| OIL | 2.89 | 0.4 | 8 |
| KTKBANK | 6.90 | 1.2 | 6 |
| ICICIBANK | 32.39 | 7.8 | 4 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|-------|-------|
| USD/INR | 66.509 | 0.679 | 1.03 |
| GBP/INR | 104.007 | 0.621 | 0.60 |
| EUR/INR | 76.273 | 2.004 | 2.70 |
| JPY/INR | 54.970 | 1.420 | 2.65 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 27032 | 219 |
| Silver (Rs/1kg) | 35600 | (602) |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 38.5 | (2.80) |
| Brent (US\$/BBL) | 43.0 | (3.89) |
| Gold (US/oz) | 1154.9 | (0.40) |
| Silver (US\$/oz) | 15.0 | (1.64) |
| Copper (US\$/MT) | 4888.0 | (3.13) |
| Alum (US\$/MT) | 1485.5 | (2.49) |
| Zinc(US\$/MT) | 1708.5 | (3.56) |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 8.51 | (0.58) |
| HDFC Bank | 56.77 | (3.17) |
| Infosys | 16.54 | (0.51) |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 59.49 | (3.07) |
| Wipro | 11.41 | (0.52) |
| Tata Motors | 22.49 | (1.97) |

Market Sensor

US market plunged more than 3.5 percent on Monday, closing off session lows in high volume trade as fears of slowing growth in China pressured global markets. Dow Jones Industrial Average was down 3.57% or 588.40 points at 15871.35. Nasdaq Composite was down 3.82% or 179.79 points at 4526.25. Standard & Poor's 500 was down 3.94% or 77.68 points at 1893.21.

Indian equity market tanked yesterday and registered one of the biggest single day fall in absolute term as benchmarks slipped close to six percent. The selling was perpetuated by Global selloff in equities, commodities and emerging market currencies. Ever since China has depreciated their currency global market had been in a turmoil. Nifty ended the previous day with a decline of 5.92% or 490.95 points at 7809.00. On Monday's trading session, FII's sold net Rs.5275.4 Cr in cash market and sold net Rs.0.445 in derivative segment. Whereas, DII bought net Rs.4097.83 Cr in cash segment.

Global News

- ❖ Japanese Finance Minister Taro Aso warned market players against pushing up the yen too much further, saying that its spike against the dollar overnight was "rough" and undesirable for the economy.(CNBC)
- ❖ China plans to let its main state pension fund invest in the stock market for the first time, the country's official news agency, Xinhua, has reported. Under the new rules, the fund will be allowed to invest up to 30% of its net assets in domestically-listed shares.(BBC News)
- ❖ North Sea oil revenues in the first three months of 2015 were down 75% on the previous quarter, the Scottish Conservatives have said. The Scottish government's quarterly national accounts show that the amount received in tax receipts between January and March was £168m. (BBC News)
- ❖ Federal Reserve Bank of Atlanta President Dennis Lockhart said he continues to expect the first interest-rate hike in nearly a decade this year, while cautioning that a stronger dollar, a weaker Chinese yuan and falling oil prices complicate the outlook.(Bloomberg)
- ❖ China's central bank added the most funds to the financial system in open-market operations since January 2014 as currency-market intervention to prop up the yuan strained the supply of cash. (Bloomberg)

Economic News

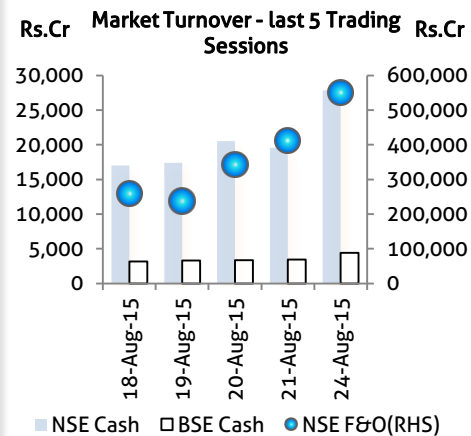
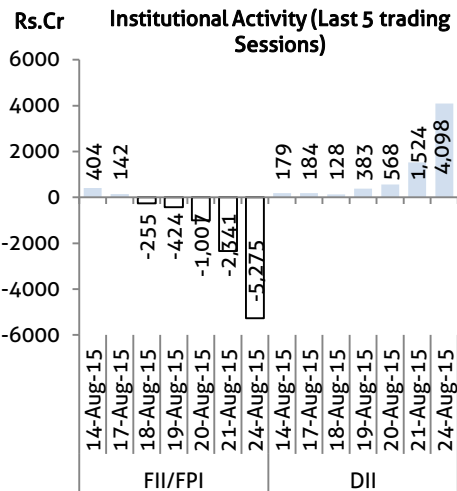
- ❖ Finance Minister Arun Jaitley said the Constitution Amendment Bill to roll out Goods and Services Tax will soon see the light of day and the Revenue Department is getting ready with three Bills to ensure its implementation. (BS)
- ❖ Country's manufacturing sector growth improved both in terms of month-on-month as well as yearly basis in August, an SBI research report said, adding that mining and electricity are still acting as a drag on the economic activity. (BS)
- ❖ Despite retail inflation for July falling to record lows, the country's central bank still thinks inflation expectations are still high indicating its unwillingness to drop guard against price rise. (BS)
- ❖ Finance Minister Arun Jaitley stressed the need to maintain course on economic reforms in the face of such "transient crisis" as the BSE saw its sharpest fall in terms of points on Monday. (BS)
- ❖ SBI chairman Arundhati Bhattacharya joined the debate on frequent call drops, citing a personal experience of not being able to get seamless connectivity while driving along Marine Drive, and warned that bad networks are detrimental to financial inclusion agenda. (BS)
- ❖ Union environment minister Prakash Javadekar on Monday said that India would continue to ask for developed countries to meet their obligations to provide finance and technology to developing countries. (BS)
- ❖ Enthused by increase in indirect tax collections, Finance Minister Arun Jaitley said that the economy is in a revival phase and hinted that it will clock a growth rate in excess of 8 per cent in 2015-16. (BS)
- ❖ Amid bloodbath in stock and currency markets, RBI head Raghuram Rajan tried to allay fears saying the country has strong macroeconomic fundamentals and sufficient forex reserves to contain volatility while he also hinted at a rate cut if inflation remains low. (BS)
- ❖ Oil prices hit 6-1/2-year lows on Monday after Chinese stock markets suffered their biggest one-day fall since the global financial crisis, intensifying worries over the outlook for global oil demand. (BS)
- ❖ Global crude oil prices fell to a six-and-a-half year low in Monday morning trade on the back of Iran's fresh commitment to boost production and higher drilling activity in the US coupled with renewed growth concerns in China, the second largest consumer of oil, impacting the global economy. (BS)
- ❖ Interest rate cuts should only be delivered after sustained low inflation, and not as "goodies" doled out after public pleading, Reserve Bank of India Governor Raghuram Rajan said on Monday. (BS)

Domestic News

- ❖ Tata Trusts on Monday signed a Memorandum of Understanding (MoU) with Andhra Pradesh government to work towards community empowerment and improve the overall quality of living through an integrated multi-thematic approach in the region. (BS)
- ❖ Uttar Pradesh government has issued Recovery Certificates (RC) against 10 private sugar mills for their failure to clear cane farmers' dues. (BS)
- ❖ Glenmark Pharmaceuticals is expecting approvals for four to six new products during the fiscal from the US Food and Drug Administration (USFDA), a senior official said.

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.1527 | (0.0093) | (0.80) |
| GBP-USD | 1.5755 | (0.0023) | (0.15) |
| USD-JPY | 120.06 | 1.6400 | 1.39 |

| Bond Markets | Closing | Chg |
|----------------|---------|-----------|
| 10-yr bond | 7.97 | 5.40 bps |
| Interbank call | 7.13 | -1.06 bps |



Domestic News (Cont...)

❖ Adani Enterprises, the flagship firm of Adani Group, has inked a pact with the Chhattisgarh government to invest over Rs 25,000 crore for setting up urea and power projects as well as rice bran oil extraction plant in the state. (BS)

❖ Rane TRW Steering Systems Pvt Ltd, a 50:50 joint venture between Rane Group and ZF TRW, launched an airbag production plant in Chennai, in order to address the expected market demand, once government regulations fall in place in October 2017. (BS)

❖ The government's 10 per cent stake sale in Indian Oil Corp was over-subscribed despite high market turmoil even as retail investors shunned the biggest disinvestment of this fiscal by picking up less than one-fifth of the quota. (BS)

❖ Royal Enfield has entered the Indonesian market, targeting the mid-size motorcycle segment, and has opened an exclusive store in Jakarta. The company has said the foray into Indonesia, which is the third largest two-wheeler market in the world, is part of company's growth strategy and focussed international thrust to expand its presence in the mid-sized motorcycle segment (250-750cc). (BS)

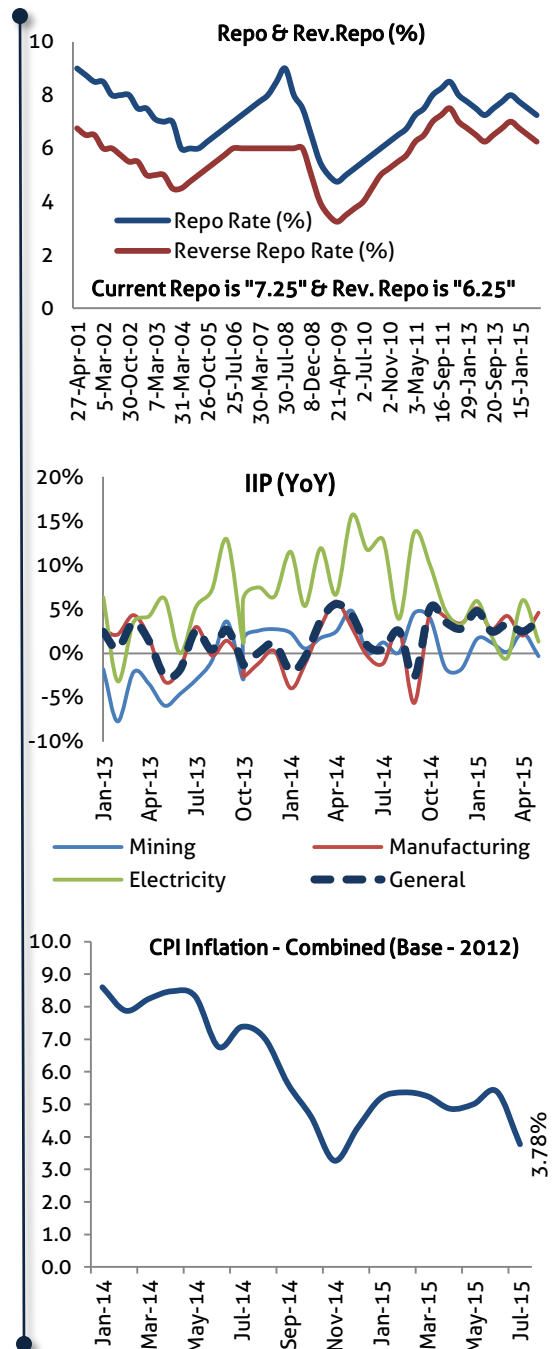
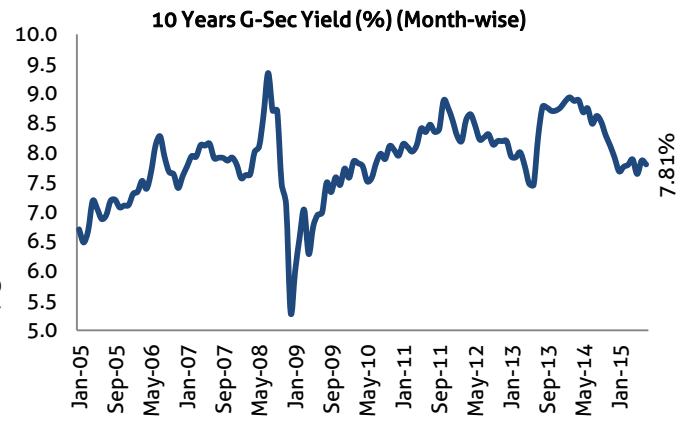
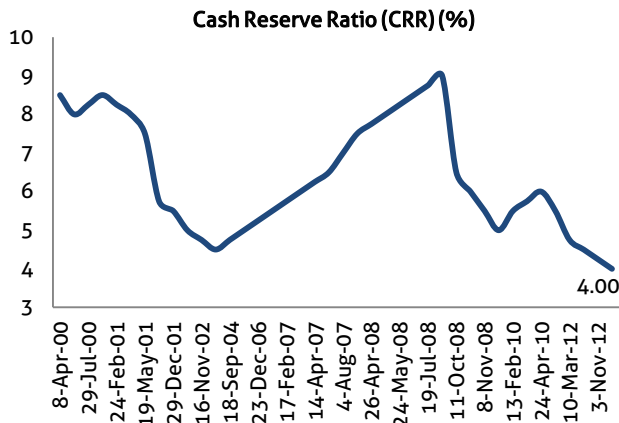
❖ As part of its effort to expand its footprint as well as revenues in diabetes segment, Mumbai-based generics drug player Glenmark Pharmaceuticals Limited announced the launch of generic Teneligliptin, a new third-generation oral anti-diabetic drug, at a substantially lower price compared to other Gliptins available in India. (BS)

❖ Onion prices are going crazy all over India, but residents in Chandigarh are able to buy the vegetable at a throwaway price of Rs 20 per kilogram. (BS)

❖ Depreciating rupee has prompted overseas textile and apparel importers to re-negotiate their contract terms to get a pie in higher realisation by Indian exporters. New contract orders are being deferred till Indian currency stabilises. (BS)

❖ State-run Hindustan Petroleum Corporation Limited has registered its best ever performance since its formation in 1974 with profit of Rs 2733 crore for the financial year 2014-15. (BS)

❖ Indian Oil Corp on Monday said all units at its 274,000 barrels per day (bpd) Koyali refinery in western Gujarat are running normally except the 44,000 bpd crude distillation unit (CDU), where a minor fire occurred during a planned maintenance shutdown. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------------------|---|----------|-------------|-------|
| 24-Aug-15 | Gujarat Pipavav Port Ltd | CREDIT SUISSE (SINGAPORE) LIMITED A/C CREDIT SUISSE (SINGAP | SELL | 7200000 | 173.1 |
| 24-Aug-15 | Housing Development and I | SHAASTRA SECURITIES TRADING PRIVATE LIMITED | SELL | 2496652 | 64.5 |
| 24-Aug-15 | GHCL Limited | OCEAN DIAL GATEWAY TO INDIA MAURITIURS LTD | BUY | 924034 | 115.9 |
| 24-Aug-15 | Escorts India Ltd. | GREATER INDIA PORTFOLIO | BUY | 660521 | 154.4 |
| 24-Aug-15 | Shyam Century Ferrous Ltd | BRIJ BHUSHAN AGARWAL & SONS (HUF) | SELL | 3500000 | 10.3 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|---------------------------------|----------|-------------|-------|
| 24-Aug-15 | MBECL | RAJASTHAN GLOBAL SECURITIES LTD | B | 229,369 | 93.0 |
| 24-Aug-15 | CTE | BHASKAR C PANIGRAHI | S | 239,409 | 49.7 |
| 24-Aug-15 | SREERAYA | SUBHADRABEN RASIKLAL SHAH | B | 612,600 | 13.5 |
| 24-Aug-15 | KAUSAMBI | AMITKUMAR RAMESHCHANDRA RANA | S | 823,020 | 8.4 |
| 24-Aug-15 | DAMOINDUS | KAMLADEVI RAMKUMAR BHARADIA | S | 48,655 | 58.6 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|------------|-----------|--------------------------------|-------------|
| 532382 | BALAJITELE | 25-Aug-15 | Final Dividend - Rs. - 0.6000 | - |
| 501831 | COASTCORP | 25-Aug-15 | Dividend - Rs. - 1.5000 | - |
| 509557 | GARWALLROP | 25-Aug-15 | Dividend - Rs. - 3.0000 | - |
| 500233 | KAJARIACER | 25-Aug-15 | Dividend - Rs. - 4.0000 | - |
| 531241 | LINCPEN | 25-Aug-15 | Dividend - Rs. - 2.5000 | - |
| 526299 | MPHASIS | 25-Aug-15 | Dividend - Rs. - 16.0000 | - |
| 530521 | VIRAT | 25-Aug-15 | Final Dividend - Rs. - 1.8000 | - |
| 530809 | BNRUDY | 26-Aug-15 | Dividend - Rs. - 1.0000 | - |
| 536147 | BSLAPXDG | 26-Aug-15 | Temporary Suspension | 27-Aug-15 |
| 536148 | BSLAPXDND | 26-Aug-15 | Temporary Suspension | 27-Aug-15 |
| 536149 | BSLAPXDQD | 26-Aug-15 | Temporary Suspension | 27-Aug-15 |
| 536150 | BSLAPXRG | 26-Aug-15 | Temporary Suspension | 27-Aug-15 |
| 536151 | BSLAPXRND | 26-Aug-15 | Temporary Suspension | 27-Aug-15 |
| 536152 | BSLAPXRQD | 26-Aug-15 | Temporary Suspension | 27-Aug-15 |
| 532333 | HBPOR | 26-Aug-15 | Dividend - Rs. - 0.5000 | - |
| 533155 | JUBLFOOD | 26-Aug-15 | Dividend - Rs. - 2.5000 | - |
| 532500 | MARUTI | 26-Aug-15 | Final Dividend - Rs. - 25.0000 | - |
| 533608 | RDBRL | 26-Aug-15 | Final Dividend - Rs. - 0.5000 | - |
| 507944 | BAJAJST | 27-Aug-15 | Dividend - Rs. - 4.0000 | - |
| 531344 | CONCOR | 27-Aug-15 | Final Dividend - Rs. - 5.4000 | - |
| 532155 | GAIL | 27-Aug-15 | Final Dividend - Rs. - 3.0000 | - |
| 532734 | GPIL | 27-Aug-15 | Final Dividend - Rs. - 1.0000 | - |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|--|--------|----------|----------|
| 24-Aug-15 | EUR | Manufacturing PMI (Aug) | | | |
| 24-Aug-15 | EUR | Services PMI (Aug) | | | |
| 24-Aug-15 | USD | Chicago Fed National Activity (Jul) | | | 0.08 |
| 25-Aug-15 | USD | House Price Index (YoY) (Jun) | | | 5.70% |
| 25-Aug-15 | USD | S&P/CS HPI Composite - 20 n.s.a. (YoY) (Jun) | | 5.10% | 4.90% |
| 25-Aug-15 | USD | Services PMI (Aug) | | | |
| 25-Aug-15 | USD | CB Consumer Confidence (Aug) | | 93.2 | 90.9 |
| 25-Aug-15 | USD | New Home Sales (Jul) | | 520K | 482K |
| 25-Aug-15 | USD | Richmond Manufacturing Index (Aug) | | | 13 |
| 26-Aug-15 | USD | MBA 30-Year Mortgage Rate | | | 4.11% |
| 26-Aug-15 | USD | Durable Goods Orders (MoM) (Jul) | | -0.50% | |
| 26-Aug-15 | USD | Services PMI (Aug) | | | |
| 27-Aug-15 | GBP | Nationwide HPI (YoY) (Aug) | | | |
| 27-Aug-15 | EUR | Private Sector Loans (YoY) (Jul) | | 0.70% | 0.60% |
| 27-Aug-15 | USD | GDP (QoQ) (Q2) | | 3.10% | 2.30% |
| 27-Aug-15 | USD | Real Consumer Spending (Q2) | | | 2.90% |
| 27-Aug-15 | USD | Bloomberg Consumer Confidence | | | 41.1 |
| 27-Aug-15 | USD | Pending Home Sales (MoM) (Jul) | | 1.00% | -1.80% |
| 27-Aug-15 | USD | KC Fed Composite Index (Aug) | | | -7 |
| 28-Aug-15 | JPY | Household Spending (YoY) (Jul) | | 1.30% | -2.00% |
| 28-Aug-15 | JPY | National CPI (YoY) (Jul) | | | 0.40% |
| 28-Aug-15 | JPY | Tokyo CPI (YoY) (Aug) | | | 0.20% |
| 28-Aug-15 | JPY | Unemployment Rate (Jul) | | 3.40% | 3.40% |
| 28-Aug-15 | GBP | Business Investment (YoY) (Q2) | | | 5.70% |
| 28-Aug-15 | GBP | GDP (YoY) (Q2) | | 2.60% | 2.60% |
| 28-Aug-15 | EUR | Business and Consumer Survey (Aug) | | 104 | 104 |
| 28-Aug-15 | EUR | Consumer Inflation Expectation (Aug) | | | 4.2 |
| 28-Aug-15 | EUR | Industrial Sentiment (Aug) | | -3 | -2.9 |
| 28-Aug-15 | USD | Core PCE Price Index (MoM) (Jul) | | 0.20% | |
| 28-Aug-15 | USD | Personal Spending (MoM) (Jul) | | 0.40% | |
| 28-Aug-15 | USD | Michigan Consumer Sentiment (Aug) | | 93.3 | 92.9 |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|------|-------|-------|--------|----------|----------|
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