

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8767	0.06	CNX IT	12633	0.53
Sensex	29008	0.01	BANK NIFTY	18733	(0.80)
DowJones	18225	0.08	S&P CNX 500	7144	(0.03)
Nasdaq	4967	(0.02)	CNX FMCG	22295	0.28
Hangseng	24760	(0.07)	CNX REALTY	3771	(0.35)
Shanghai	3220	(0.27)	CNX AUTO	8781	0.04
Nikkei	18688	0.55	CNX ENERGY	8467	(0.04)
Strait Times	3427	(0.40)	CNX PHARMA	11534	(1.12)
Kospi	1987	(0.19)	Advances / Declines	BSE	NSE
Taiwan	9619	(0.83)	Advances	1203	599
FTSE	6935	(0.21)	Declines	1694	888
CAC	4882	(0.09)	Unchanged	102	66
DAX	11210	0.04	Total	2999	1553

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ACC	1664.00	2.84
HDFC	1341.90	2.40
BHARTIARTL	349.65	2.22
ULTRACEMCO	3045.00	1.89
INFY	2314.00	1.81

Nifty Losers		
Company	Price(Rs)	Chg(%)
DRREDDY	3282.50	(2.30)
SUNPHARMA	889.50	(2.30)
TATASTEEL	350.95	(2.27)
TATAPOWER	82.70	(2.07)
BHEL	272.40	(1.93)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
OCL	158.20	17.6	9
INDGELA-\$	7.02	0.8	9
PHOENIXLTD	1.98	0.3	8
FAGBEARING	0.19	0.0	8
MUNJALSHOW	2.36	0.4	6

Indian Forex	Closing	Chg	% Chg
USD/INR	62.047	(0.229)	(0.37)
GBP/INR	96.030	(0.180)	(0.19)
EUR/INR	70.429	(0.173)	(0.24)
JPY/INR	52.280	0.040	0.08

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26540	90
Silver (Rs/1kg)	36830	485

Commodities	Price	% Chg.
Crude (US\$/BBL)	50.7	2.86
Brent (US\$/BBL)	61.4	4.30
Gold (US/oz)	1207.9	(0.11)
Silver (US\$/oz)	16.6	(0.60)
Copper (US\$/MT)	5805.0	1.57
Alum (US\$/MT)	1783.5	(0.47)
Zinc(US\$/MT)	2055.5	0.27

ADR	Cl. Values	% Chg.
ICICI Bank	11.00	0.02
HDFC Bank	60.36	0.26
Infosys	36.77	0.02
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	52.45	(1.53)
Wipro	14.01	0.26
Tata Motors	48.43	0.15

Market Sensor

US market closed narrowly mixed on Wednesday, as the Dow Jones Industrial Average closed at a new record amid firming oil prices, moderate housing data and some debate over Fed Chair Janet Yellen's congressional testimony. Dow Jones Industrial Average was up 0.08% or 15.38 points at 18224.57. Nasdaq Composite was down 0.02% or 0.99 points at 4967.14. Standard & Poor's 500 was down 0.08% or 1.62 points at 2113.86.

Indian equity market opened on strong note but profit booking in the later half eliminated all the gains ahead of important events like Rail Budget, F&O Expiry and Budget. Nifty ended the previous trading session with a gain of 0.06% or 5.15 points at 8767.25. On Wednesday's trading session, FII's bought Rs.516.06 Cr in cash market and sold net Rs.1292.39 in derivative segment. Whereas, DII bought net Rs.19.7 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8730 followed by 8680 while resistance exist at 8810 and then at 8870.

Global News

❖ Greece said on Wednesday it will struggle to make debt repayments to the IMF and the European Central Bank this year as Germany's finance minister voiced open doubts about Athens' trustworthiness. (BBC)

❖ The European Commission gave France until 2017 to get its budget deficit below an EU-imposed limit, sparing Paris a fine and giving it a new two-year grace period after it missed a second deadline to put its finances in order. (BBC)

❖ Federal Reserve Chair Janet Yellen on Wednesday fended off a stream of aggressive questions from Republican lawmakers who accused the central bank of making Democratic political causes a higher priority than its stewardship of the U.S. economy. (BBC)

❖ Ukraine's central bank unexpectedly banned most currency trading on Wednesday, only to abruptly reverse the decision overnight, causing havoc in the market for the plunging hryvnia. (BBC)

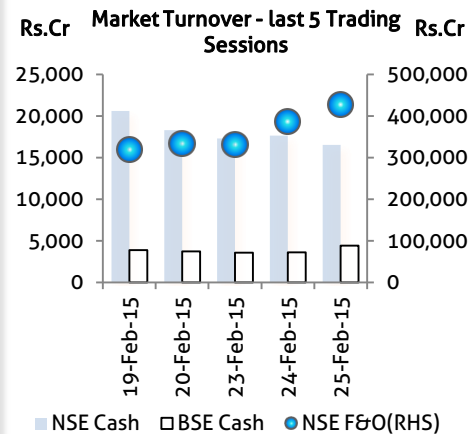
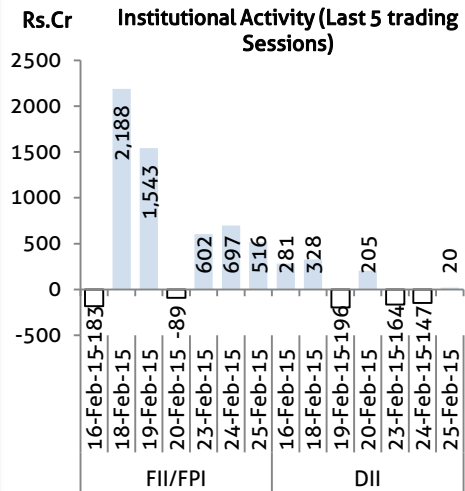
❖ Six weeks after a fateful decision that blasted its currency skywards, Switzerland's central bank is coming under intense scrutiny, with critics calling for changes to its insular policy practices and century-old ownership structure. (BBC)

Economic News

- ❖ The government approved setting up of 15,000 MW grid-connected solar power projects by state-run NTPC under the National Solar Mission. (BS)
- ❖ RBI Governor Raghuram Rajan went by the majority suggestion of the central bank's external advisors to wait for signals from the Union Budget before reducing key interest rate, although three of the seven members were for a cut of 25-75 basis points. (BS)
- ❖ The Unit 3 and 4 of the Kudankulam Nuclear Power Project (KKNPP) with 2x1000 MW capacity is being prepared for launch in 2015-16. (BS)
- ❖ Aviation Turbine Fuel (ATF), used in aircraft, costs less than petrol and diesel as the common man auto fuels attract higher excise duty levy, Oil Minister Dharmendra Pradhan said. (BS)
- ❖ The Delhi government announced reduction in power tariff by 50% for consumption up to 400 units per month and launched a free water scheme in line with election promises made by Aam Aadmi Party. (BS)
- ❖ Oil regulator PNGRB has suggested a maximum marketing margin on natural gas sold to fertilizer and LPG plants of about 11.5 cents, less than what state-run GAIL and Reliance Industries currently charge from gas users. (BS)
- ❖ India is set to exit FY15 as the second largest BRIC economy this year, as the GDP hits \$2 trillion. The Central Statistical Office (CSO) is estimating the Indian economy to grow by 7.5% in the fiscal year 2014-15. With this, India would have earned itself the dubious distinction of becoming the fastest growing economy in the world alongside China. (BS)
- ❖ Talks on the sale of 126 Rafale fighter jets to India are advancing, a French defence ministry spokesman said during a visit to India by Defence Minister Jean-Yves Le Drian to salvage a deal stalled on the issue of local assembly of the aircraft. (BS)
- ❖ As much as 2.9 million tonnes of steel was imported from China in the first 10 months of the current fiscal, as against 8.1 MT of total inward shipments of the metal, the government said. (BS)
- ❖ If the government's push to locally manufacture defence equipments fructifies, the sector can fetch close to \$17 billion from exports, while it can grow seven times to \$41 billion by FY22, says a report. (BS)
- ❖ India bears 21% of the global disease burden, losing at least 6% of gross domestic product (GDP) to premature death and preventable illness. (BS)
- ❖ Reform measures undertaken by the government to accelerate growth and address fiscal and supply side constraints will determine India's sovereign credit profile, rating agency Moody's said. (BS)
- ❖ Global rating agency Moody's said fiscal policies and structural reforms will determine India's sovereign credit profile, and not recent revisions to the economic growth data. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1367	0.0006	0.05
GBP-USD	1.5546	0.0018	0.12
USD-JPY	118.91	0.05	0.04

Bond Markets	Closing	Chg
10-yr bond	7.71	-0.50 bps
Interbank call	7.58	-15.62 bps



Domestic News

- ❖ State-owned IFCI declared 10 per cent interim dividend for 2014-15. The board has declared interim dividend of Rs 1 per equity share of Rs 10 each, IFCI said in a statement. (BS)
- ❖ Newly-launched Vistara airline claimed that it surpassed all domestic carriers including budget airline IndiGo in the on-time performance (OTP) in January, with 89.35% of its flight arriving and departing on their scheduled time. (BS)

Domestic News (Cont...)

❖ Bharti Airtel, India's biggest mobile phone operator by users is raising as much as \$415 million through the sale of shares in mobile tower unit Bharti Infratel, two sources directly involved in the process told Reuters. (BS)

❖ Jet Airways lowered the base fares by up to 35% on its international routes for a limited period, which will also be applicable on the network of its partner airline Gulf-based Etihad. (BS)

❖ Essar Oil will shut its 405,000 barrels per day Vadinar refinery in western Gujarat state for about four weeks of maintenance in May-June, a company spokesman said. (BS)

❖ Realty major DLF's sales bookings will cross Rs 3,000 crore this fiscal helped by better sales during this quarter in its two housing projects at Gurgaon, a senior company official said. (BS)

❖ A majority of India Inc's Chief Financial Officers (CFOs) remain concerned over regulatory impediments and uncertainty in tax environment, saying they pose risk to the government's 'Make in India' initiative. (BS)

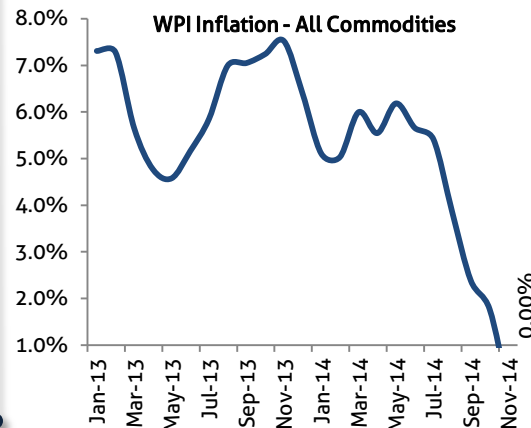
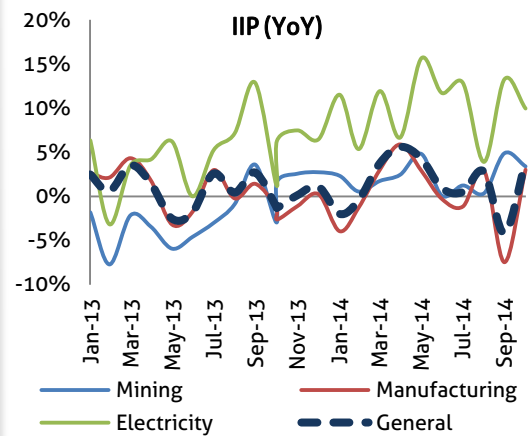
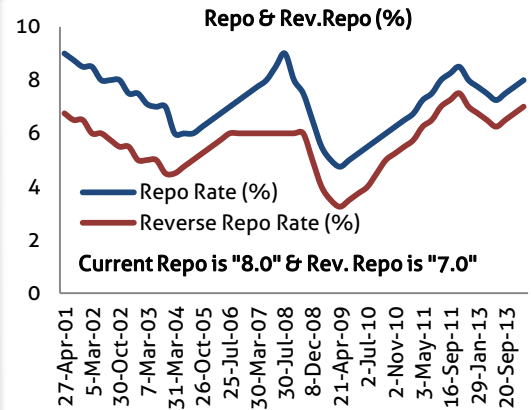
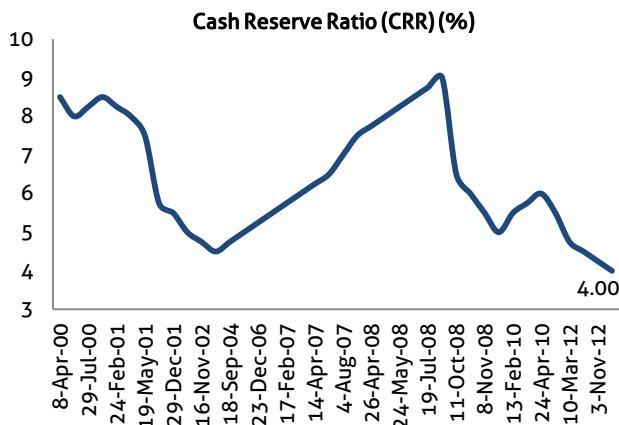
❖ Pennar Enviro Limited (PEL) and Pennar Engineering Buildings Systems (PEBS), subsidiaries of Pennar Industries Limited, a Hyderabad-based company engaged in the production and marketing of specialized and engineered steel solutions, have received orders worth Rs 150 crore. (BS)

❖ Only 40 per cent recruiters expect to give increments in the range of 10-15 per cent, said respondents surveyed under the Naukri's Hiring Outlook survey 2015. This is a half-yearly survey which gauges the hiring sentiment of companies and consultants. (BS)

❖ Ratan Tata, former chairman of Tata Sons, has confirmed Jaguar Land Rover plans to have a production plant in North America even as executives of the UK-based brand scout for a suitable location. (BS)

❖ Tata Steel Thailand PCL, the Thai unit of India's Tata Steel Group, said on Wednesday it expected to post a net loss for the fiscal year ending March 2015, hit by falling steel prices and weak demand. (BS)

❖ Glenmark Pharmaceuticals has received approval from the US health regulator for generic Ashlyna contraceptive tablets and launched them in the American market. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Feb-15	ABG Shipyard Limited	DB INTERNATIONAL ASIA LIMITED	BUY	660000	229.4
25-Feb-15	Titagarh Wagons Limited	N.K. SECURITIES	SELL	227210	589.2
25-Feb-15	Mangalore Chemicals & Fer	KIRAN VYAPAR LIMITED	BUY	600000	87.5
25-Feb-15	Kalindee Rail Nirman (Eng	N.K. SECURITIES	SELL	130957	141.6
25-Feb-15	Sumeet Ind Limited	GINNI TRADELINKS PVT LTD	SELL	500000	21.8

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Feb-15	OCL	DALMIA CEMENT (BHARAT) LIMITED	B	15,167,166	674.9
25-Feb-15	BAJAJELEC	JAMNALAL SONS PRIVATE LIMITED	S	675,000	215.6
25-Feb-15	USHDI	UD TRADING GROUP HOLDING PTE LTD	B	285,000	335.0
25-Feb-15	ABGSHIP	DB INTERNATIONAL (ASIA) LIMITED	B	290,000	228.1
25-Feb-15	INDGELA-\$	SUNIL PRATAPSIKH MIRANI	B	436,516	79.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
23269	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
533033	ISGEC	26-Feb-15	Interim Dividend - Rs.10.00	27-Feb-15
532539	MINDAIND	26-Feb-15	Interim Dividend - Rs.2.50	27-Feb-15
533286	MOIL	26-Feb-15	Interim Dividend - Rs.5.00	27-Feb-15
513683	NEYVELILIG	26-Feb-15	Interim Dividend - Rs.1.80	27-Feb-15
523539	PRECWIRE	26-Feb-15	2nd Interim Dividend - Rs.1.00	27-Feb-15
531688	PRITHVISOF	26-Feb-15	Interim Dividend - Rs.0.50	27-Feb-15
506248	AMNPLST	27-Feb-15	Stock Split from Rs. 10/- to Rs.2/-	02-Mar-15
524735	HIKAL	27-Feb-15	Stock Split from Rs.10/- to Rs.2/-	02-Mar-15
533353	IPRU1073	27-Feb-15	Temporary Suspension	02-Mar-15
533355	IPRU1074P	27-Feb-15	Dividend On Mutual Fund	02-Mar-15
533355	IPRU1074P	27-Feb-15	Temporary Suspension	02-Mar-15
533357	IPRU1304	27-Feb-15	Temporary Suspension	02-Mar-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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