

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6200	0.23	CNX IT	10163	0.95
Sensex	20852	0.20	BANK NIFTY	10667	(0.16)
DowJones	16180	(0.17)	S&P CNX 500	4794	0.22
Nasdaq	4288	(0.13)	CNX FMCG	16689	0.35
Hangseng	22378	0.27	CNX REALTY	155	0.16
Shanghai	2033	(0.06)	CNX AUTO	5346	0.60
Nikkei	15028	(0.15)	CNX ENERGY	7437	(0.33)
Strait Times	3093	(0.34)	CNX PHARMA	8002	(0.04)
Kospi	1966	0.05	Advances / Declines	BSE	NSE
Taiwan	8604	0.33	Advances	1312	660
FTSE	6831	(0.52)	Declines	1355	747
CAC	4415	(0.10)	Unchanged	153	88
DAX	9699	(0.10)	Total	2820	1495

Nifty Gainers		
Company	Price(Rs)	Chg(%)
WIPRO	595.00	3.00
BAJAJ-AUTO	1906.50	2.40
AMBUJACEM	163.45	2.12
BPCL	371.35	2.02
BHEL	159.50	1.88

Nifty Losers		
Company	Price(Rs)	Chg(%)
NMDC	131.25	(2.99)
SSLT	179.30	(2.50)
TATASTEEL	360.10	(2.46)
COALINDIA	245.85	(2.44)
TATAPOWER	80.90	(2.35)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Karur Vysya Bank	4.05	0.09	45
IBUL HSG FIN	9.98	0.35	29
Engineers India	8.45	0.34	25
Bharti Infratel	22.62	1.39	16
Godrej Inds	7.75	1.04	7

Indian Forex	Closing	Chg	% Chg
USD/INR	61.977	(0.142)	(0.23)
GBP/INR	103.309	(0.075)	(0.07)
EUR/INR	85.144	(0.180)	(0.21)
JPY/INR	60.510	(0.200)	(0.33)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30625	(75)
Silver (Rs/1kg)	47645	45

Commodities	Price	% Chg.
Crude (US\$/BBL)	101.9	(0.61)
Brent (US\$/BBL)	109.6	(0.81)
Gold (US/oz)	1338.6	0.37
Silver (US\$/oz)	21.9	(0.05)
Copper (US\$/MT)	7115.0	(0.21)
Alum (US\$/MT)	1708.5	0.53
Zinc(US\$/MT)	2058.5	0.76

ADR	Cl. Values	% Chg.
ICICI Bank	34.71	0.06
HDFC Bank	33.60	(0.18)
Infosys	60.76	(0.29)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	45.18	0.13
Wipro	13.76	0.06
Tata Motors	32.76	(0.02)

Market Sensor

US market declined on Tuesday, with the S&P 500 backing off from a record close, as investors weighed a decline in consumer confidence and better-than-expected earnings from home-improvement retailer Home Depot. Dow Jones Industrial Average was down 0.17% or 27.48 points at 16179.66. Nasdaq Composite was down 0.13% or 5.38 points at 4287.59. Standard & Poor's 500 was down 0.13% or 2.49 points at 1845.12.

Indian equity market ended marginally higher in the previous trading session led by Consumer durable and technology stocks. Nifty ended the previous trading session with a gain of 0.23% or 13.95 points at 6200.05. On Tuesday's trading session, FIIs bought net Rs.423.41 Cr in cash market and bought net Rs.1890.77 in derivative segment. Whereas, DII sold net Rs.28912 Cr in cash segment.

Coming to today's trade Nifty to remain volatile crucial intraday support in Nifty exists at 6170 followed by 6140 while resistance is seen at 6220 followed by 6260

Global News

❖ Timothy Geithner's memoir will explain his decisions during the global financial crisis, tackle any misperceptions and describe surviving a political firestorm from Wall Street to Main Street, he said. (Bloomberg)

❖ International Monetary Fund Managing Director Christine Lagarde said a recent meeting of Group of 20 finance chiefs and central bankers convinced her that policy makers are working in the right direction to boost growth. (Bloomberg)

❖ Home prices in the U.S. climbed at a slower pace in the year through December, pointing to a moderation in the market that will help keep more properties within reach for prospective buyers. (Bloomberg)

❖ Consumer confidence fell more than forecast in February as growing concern about the U.S. economy's direction outweighed improving perceptions of its current state. (Bloomberg)

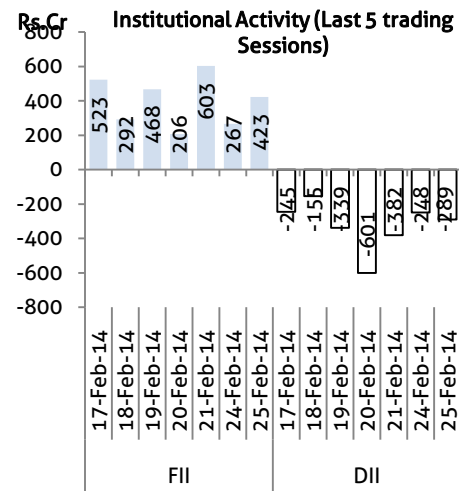
❖ President Barack Obama and House Speaker John Boehner met at the White House as lawmakers weigh the administration's call to revamp U.S. immigration law.

Economic News

- ❖ Chhattisgarh had diverted a little less than a million tonne of foodgrains allotted by the Government of India (GOI) to execute the state-run scheme. (BS)
- ❖ Airports Economic Regulatory Authority has scrapped the user development fee (UDF) being collected at the Rajiv Gandhi International Airport operated by GMR Group here, effective April 1. (BS)
- ❖ The inter-ministerial group (IMG) mandated to oversee status of allocated coal blocks has turned down Odisha's plea to reconsider its recommendation for de-allocating two blocks allotted in the state for coal-to-liquid (CTL) projects. (BS)
- ❖ Central Electricity Regulatory Commission's (CERC) recent regulation on electricity tariff underscores the strides taken by the power sector over the years. Apart from fixing the manner in which tariff will be calculated over the next five years, CERC's regulation demonstrates the maturity of the regulator in taking hard decisions. (BS)
- ❖ National Skill Development Corporation (NSDC), the Public Private Partnership (PPP) initiative that aims to impart skills to the Indian workforce through training programs, is on track to train 150 million people by 2022. (BS)
- ❖ Hyderabad has become the world's most affordable office locations due to rupee depreciation and fall in rentals amid political instability over Telangana, according to global realty consultant DTZ. (BS)
- ❖ Ahead of release of gross domestic product (GDP) data on Friday, financial research firm Zyfin estimated economic growth at 5.5% for the third quarter of 2013-14. (BS)

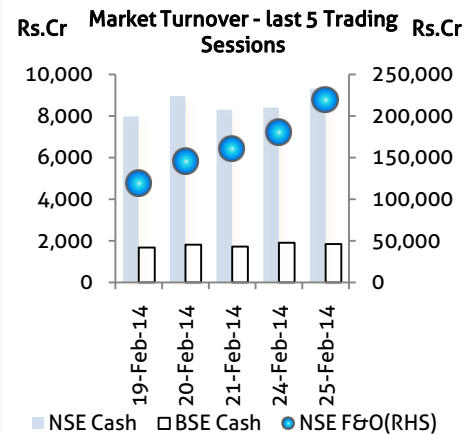
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3741	(0.0004)	(0.03)
GBP-USD	1.6673	(0.0008)	(0.05)
USD-JPY	102.33	0.09	0.09

Bond Markets	Closing	Chg
10-yr bond	9.15	2.8 bps
Interbank call	7.88	1.0 bps



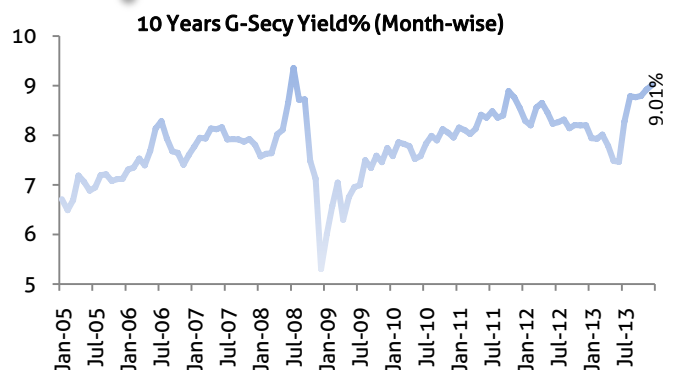
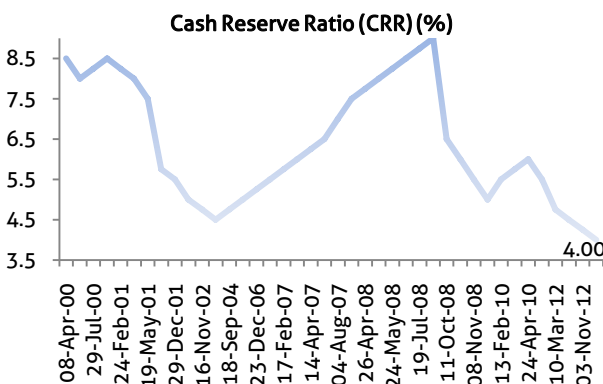
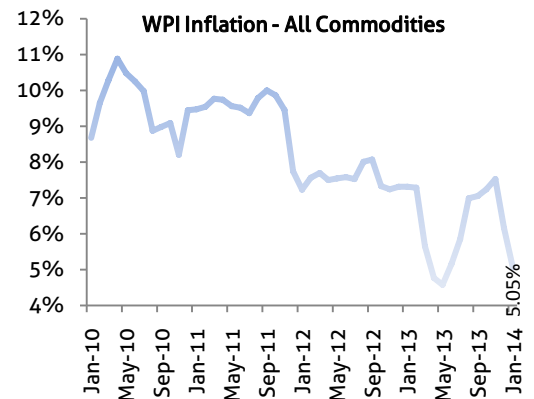
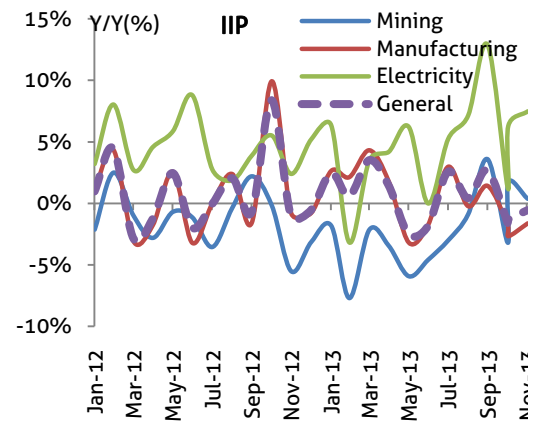
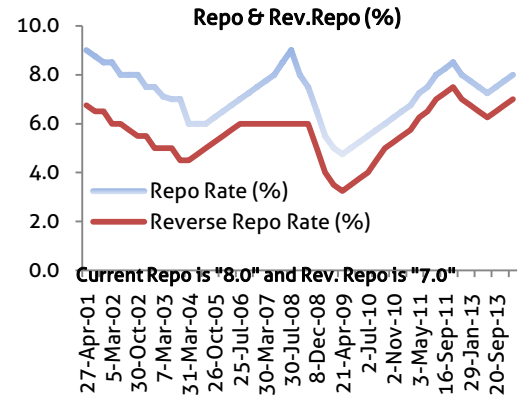
Domestic News

- ❖ Malaysian low-cost airline AirAsia, which is awaiting flying permit from the DGCA to launch its services in the domestic market, said it is offering half a million free seats along with 1.8 million low fare promotional seats from Kuala Lumpur on select routes. (BS)
- ❖ The board of state-owned Oil India Ltd (OIL) has approved the acquisition of a 5 per cent stake in Indian Oil Corp (IOC) from the government at a discount to the market price. (BS)
- ❖ India's largest drug maker Ranbaxy Laboratories Tuesday said it has halted temporarily drug ingredient production at two of its facilities in the country as a "precautionary measure". (BS)
- ❖ Reliance Industries Limited (RIL) denied all allegations made by Aam Aadmi Party (AAP) against Reliance and Mukesh Ambani in their public meeting recently. The company also alleged AAP's "continued tirade" against RIL appears to be instigated by vested interests. (BS)
- ❖ The decision of the Central Electricity Regulatory Commission (CERC) on February 21 regarding the continuation of the methodology for determination of compensatory tariff for Adani Power Ltd's 4,620 MW Mundra Thermal Power Plant, to its previous order of April 2013 and allowing tariff revision by Tata Power may put the Haryana power utilities in a bind that is already reeling under financial liabilities. (BS)
- ❖ In a major achievement for power generator NTPC Ltd, the Ministry of Environment and Forests (MoEF) has given environmental clearance for a reworked plan of the company's Rs 15,000-crore North Karanpura Super Thermal Power Project to come up in Jharkhand. (BS)



Domestic News (Cont...)

- ❖ In a bid to push the adoption of its latest operating software, Microsoft India announced the end of support for its Windows XP software from April 8, 2014. One of the company's most successful and longest running operating system was launched 12 years ago. (BS)
- ❖ Kuwait-based Hayat Invest joined hands with Chennai-based XS Real Group, to jointly develop a residential project. This will be one of the largest FDI projects into the realty sector in recent times. (BS)
- ❖ Wipro, IT services company, announced that it has been selected by Carillion, a UK based integrated support services company with a substantial portfolio of Public Private Partnership projects and extensive construction capabilities, as its sole preferred global strategic partner to provide integrated IT and BPO services. (BS)
- ❖ A total of 1,287 independent director posts of companies listed on the National Stock Exchange, are filled by people who have served on the boards of these companies for ten years or more. (BS)
- ❖ Private equity investments in the fourth quarter of 2013 touched \$2.12 billion in value terms up 19% compared to the trailing quarter and 67% in the same quarter of 2012. PE invested \$2.12 billion across 76 deals, said a PwC report. (BS)
- ❖ Reliance Industries Ltd, owner of the world's biggest oil refining complex, imported 14.2% less crude in January compared with the previous month and continued to skip purchases from Iraq, trade data compiled by Reuters show. (BS)
- ❖ Essar Oil, a key buyer of Iranian oil, in January sharply raised imports from the Islamic state and also became the first Indian refiner to ship in the Brazilian heavy grade Polvo, tanker arrival data showed. (BS)
- ❖ Ambuja Cements will resume mining operations in Himachal Pradesh with the High Court granting a stay on the Ministry of Environment and Forest's order to keep them in abeyance earlier this month. (BS)
- ❖ Indian Oil Corp, the nation's largest oil firm, will buy Malaysian firm Petronas' 10% stake in a shale-gas assets and liquefied-natural-gas (LNG) project in British Columbia for \$900 million. (BS)
- ❖ FMCG giant Unilever has partnered Internet.Org, a Facebook-led alliance, to study how Internet adoption can be increased in rural communities in India. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Feb-14	Mahindra CIE Automative L	SCHOLZ AG	SELL	2197586	64.01
25-Feb-14	Vmart Retail Ltd	KOTAK MAHINDRA (INTERNATIONAL) LTD	SELL	252691	250.03
25-Feb-14	JSW Holdings Limited	CROSSEAS CAPITAL SERVICES PVT. LTD.	BUY	88518	604.25
25-Feb-14	Gujarat Apollo Equip Ltd.	GUJARAT APOLLO INDUSTRIES LIMITED	BUY	97000	102.48
25-Feb-14	Rohit Ferro-Tech Limited	SHRIRAMRATHI MARKETING PRIVATE LIMITED	BUY	646661	8.16

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Feb-14	JINDAL SOUTH	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	S	88,314	604.15
25-Feb-14	Nikki Global	OVERARCHING DEALERS PVT LTD	S	70,079	292.4
25-Feb-14	PIRPHYTO	MAESTRO VENTURES PRIVATE LIMITED	S	618,000	25.5
25-Feb-14	Nikki Global	AAKANSHA ADVISORY SERVICES PVT LTD	B	36,000	292.4
25-Feb-14	ION Exchange-\$	MOHAN THEKKEKARA MELOTH NAMBIAR	S	80,000	82.95

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
522073	Hitech Gears	25-Feb-14	Interim Dividend - Rs.1.00	26-Feb-14
517380	Igarashi Motors	25-Feb-14	Interim Dividend - Rs.1.00	26-Feb-14
533154	INFINITE	25-Feb-14	Interim Dividend - Rs.2.00	27-Feb-14
532440	MPS	25-Feb-14	3rd Interim Dividend - Rs.7.00	26-Feb-14
532468	KAMAHOLDING-\$	26-Feb-14	2nd Interim Dividend - Rs.5.00	28-Feb-14
532899	Kaveri Seed	26-Feb-14	Interim Dividend - Rs.2.40	28-Feb-14
523539	Precision Wires	26-Feb-14	2nd Interim Dividend - Rs.4.00	28-Feb-14
532735	R Systems	26-Feb-14	Stock Split from Rs.10/- to Re.1/-	28-Feb-14
508954	SANJAY LEAS	26-Feb-14	Stock Split from Rs.10/- to Re.1/-	28-Feb-14
500870	Castrol India	28-Feb-14	Reduction of Capital	03-Mar-14
505712	Gujarat Auto	03-Mar-14	Stock Split from Rs.10/- to Rs.2/-	04-Mar-14
505537	Zee Entert	03-Mar-14	Scheme of Arrangement	04-Mar-14
532898	Power Grid Corp	04-Mar-14	Interim Dividend - Rs.-	05-Mar-14
533304	C. Mahendra Exports	05-Mar-14	Interim Dividend - Rs.0.10	06-Mar-14
532234	National Alum	05-Mar-14	Interim Dividend - Rs.-	06-Mar-14
502407	Nath Pulp	06-Mar-14	Consolidation of Shares	07-Mar-14
502407	Nath Pulp	06-Mar-14	Reduction of Capital	07-Mar-14
506260	Anuh Pharma	07-Mar-14	Interim Dividend - Rs.1.25	10-Mar-14
500126	Merck	10-Mar-14	Dividend - Rs.8.50	-
500092	CRISIL	11-Mar-14	Final Dividend - Rs.4.00	-
500092	CRISIL	11-Mar-14	Special Dividend With Final - Rs.6.00	-
505200	Eicher Motors	12-Mar-14	Dividend - Rs.30.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
24-Feb-14	EUR	CPI (YoY)		0.70%	0.70%
24-Feb-14	USD	Chicago Fed National Activity			0.16
24-Feb-14	USD	Dallas Fed Mfg Business Index			3.8
25-Feb-14	USD	Chain Store Sales (YoY)			2.10%
25-Feb-14	USD	House Price Index (YoY)			7.60%
25-Feb-14	USD	S&P/CS HPI Composite - 20 (YoY)		13.10%	13.70%
25-Feb-14	USD	CB Consumer Confidence		80.1	80.7
25-Feb-14	USD	Richmond Manufacturing Index			12
26-Feb-14	GBP	GDP (YoY)		2.80%	2.80%
26-Feb-14	USD	MBA 30-Year Mortgage Rate			4.50%
26-Feb-14	USD	New Home Sales		410K	414K
27-Feb-14	USD	Durable Goods Orders (MoM)		-0.50%	-4.20%
27-Feb-14	EUR	Consumer Confidence		-13	-11.7
27-Feb-14	USD	KC Fed Manufacturing			5
28-Feb-14	JPY	Manufacturing PMI			56.6
28-Feb-14	JPY	Household Spending (YoY)		0.20%	0.70%
28-Feb-14	JPY	Tokyo CPI (YoY)			0.70%
28-Feb-14	JPY	Industrial Production (MoM)		3.00%	0.90%
28-Feb-14	JPY	Construction Orders (YoY)			4.90%
28-Feb-14	EUR	Unemployment Rate		12.00%	12.00%
28-Feb-14	USD	GDP (QoQ)		2.70%	3.20%
28-Feb-14	USD	Chicago PMI		58.2	59.6
28-Feb-14	USD	Michigan Consumer Sentiment			81.2
28-Feb-14	USD	Pending Home Sales (MoM)		3.50%	-8.70%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
28-Feb-14	INR	Indian GDP Quarterly (YoY)			4.80%

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