

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8531	(0.14)	CNX IT	12226	0.37
Sensex	28112	(0.18)	BANK NIFTY	18310	(0.12)
DowJones	17719	(1.62)	S&P CNX 500	6972	(0.18)
Nasdaq	4877	(2.37)	CNX FMCG	19958	0.06
Hangseng	24579	0.21	CNX REALTY	3439	(1.73)
Shanghai	3706	1.22	CNX AUTO	8516	0.41
Nikkei	19437	(1.57)	CNX ENERGY	8319	(0.81)
Strait Times	3430	0.33	CNX PHARMA	12919	0.51
Kospi	2035	(0.40)	Advances / Declines	BSE	NSE
Taiwan	9614	(0.56)	Advances	955	501
FTSE	6991	(0.41)	Declines	1881	988
CAC	5021	(1.32)	Unchanged	135	64
DAX	11865	(1.17)	Total	2971	1553

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HCLTECH	1008.05	3.89
DLF	164.90	3.00
SUNPHARMA	1055.05	1.73
TATAMOTORS	541.00	1.64
ICICIBANK	316.35	1.43

Nifty Losers		
Company	Price(Rs)	Chg(%)
PNB	154.85	(4.24)
NTPC	147.10	(3.67)
COALINDIA	360.50	(2.58)
LT	1630.20	(2.51)
GAIL	380.50	(2.44)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
HINDCOMPOS	1.82	0.0	1030
GODREJPROP	37.03	0.3	125
MIRCELECTR	101.46	0.9	116
UNITDSPR	22.19	0.4	57
SAURASHCEM	53.40	1.6	34

Indian Forex	Closing	Chg	% Chg
USD/INR	62.342	0.143	0.23
GBP/INR	92.646	(0.285)	(0.31)
EUR/INR	68.121	0.088	0.13
JPY/INR	52.070	0.080	0.15

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26260	60
Silver (Rs/1kg)	37950	350

Commodities	Price	% Chg.
Crude (US\$/BBL)	50.8	6.95
Brent (US\$/BBL)	58.2	5.51
Gold (US/oz)	1197.5	0.68
Silver (US\$/oz)	17.0	0.47
Copper (US\$/MT)	6134.5	0.11
Alum (US\$/MT)	1786.5	(1.26)
Zinc(US\$/MT)	2065.5	(0.22)

ADR	Cl. Values	% Chg.
ICICI Bank	10.06	(0.18)
HDFC Bank	57.31	(1.98)
Infosys	35.02	(0.70)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	55.26	(1.11)
Wipro	13.53	(0.25)
Tata Motors	44.15	(1.42)

Market Sensor

US market plunged on Wednesday, closing more than 1 percent lower as investors weighed the impact of the strong dollar on the economy and the coming earnings season. Dow Jones Industrial Average was down 1.62% or 292.60 points at 17718.54. Nasdaq Composite was down 2.37% or 118.21 points at 4876.52. Standard & Poor's 500 was down 1.46% or 30.45 points at 2061.05.

Indian equity market upheld their prevailing consolidation bias and thus ended the fourth consecutive day of rangebound trading. Nifty ended the previous trading session with a decline of 0.14% or 12.15 points at 8530.80. On Wednesday's trading session, FIIs bought Rs.813.19 Cr in cash market and bought net Rs.16.19 in derivative segment. Whereas, DII bought net Rs.96.52 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8510 followed by 8460 while resistance exist at 8590 and then at 8640.

Global News

❖ Greece risks running out of cash by April 20 unless it secures fresh aid, a source familiar with the matter told Reuters on Tuesday, leaving it little time to convince sceptical creditors it is committed to economic reform. (Reuters)

❖ U.S. business investment spending plans fell for a sixth straight month in February, likely weighed down by a strong dollar and weak global demand, which could lead economists to further lower their first-quarter growth estimates. (Reuters)

❖ The European Union will impose punitive anti-dumping duties from Thursday on imports of stainless steel cold-rolled sheet from China and Taiwan, according to a notice on Wednesday in the EU's Official Journal. (BS)

❖ Hong Kong's leader warned activists that the public would "not be sympathetic" to more pro-democracy protests as the city prepares for the next phase of controversial political reforms. (BS)

❖ Crude oil futures surged on Wednesday, amid increasing geopolitical risks related to the advance of Iranian-backed Houthi rebels in Yemen. (Moneycontrol)

Economic News

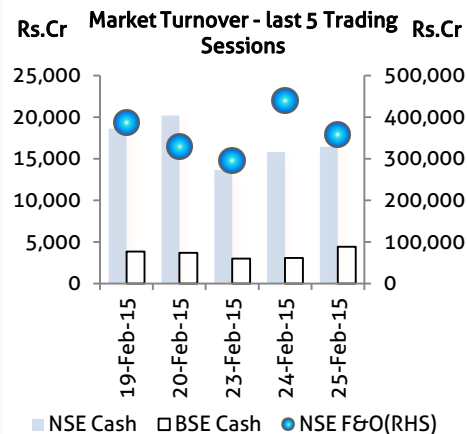
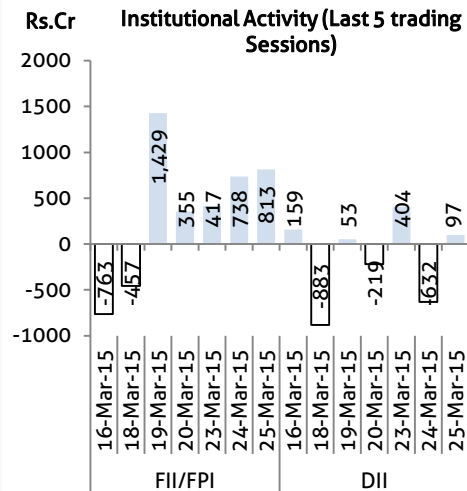
- ❖ The government approved launch of National Supercomputing Mission to connect national academic and R&D institutions with a grid of over 70 high-performance computing facilities at an estimated cost of Rs 4,500 crore. (BS)
- ❖ Mobile tariffs have to go up to meet high cost of spectrum following the aggressive bidding in the just concluded auction that fetched a record Rs 1.09 lakh crore to the government, industry bodies said . (BS)
- ❖ India and Qatar inked six agreements, including on transfer of sentenced prisoners, as visiting Emir of Qatar Tamim Bin Hamad Al Thani held talks with Prime Minister Narendra Modi on energy, investment and people-to-people ties on Wednesday. (BS)
- ❖ Reflecting positive investor sentiment in the Indian economy, 870 mergers and acquisitions (M&A) worth \$8.6 billion were announced in 2014 -- up 6 per cent over the preceding year, says a study. (BS)
- ❖ The spectrum auction ended on Wednesday after 19 days of fierce bidding. The government had received provisional bids worth more than Rs 1.09 lakh crore (\$17.5 billion) at the end of 110 rounds of bidding on Tuesday, according to a statement from the Department of Telecommunications. (BS)
- ❖ RBI signed a \$400 million currency swap agreement with the Central Bank of Sri Lanka for three years that will allow the island nation to draw the amount in dollars or euros in multiple tranches. (BS)
- ❖ While the Centre has been talking on and off record about reviving the Nokia Chennai plant, Tamil Nadu budget has totally skipped the issue. (BS)
- ❖ The Tamil Nadu government has said that due to tax buoyancy of the Centre, the state will lose heavily in real terms when new devolution pattern, based on the 14th Finance commission recommendations, is adopted. (BS)
- ❖ With the government planning to include four SAARC countries in the leave travel allowance (LTA) scheme for its employees, an amendment to the Income Tax Rules, 1922, is likely on the cards. (BS)
- ❖ The Tamil Nadu government will provide financial support of Rs 13,586 crore to the power sector as per its budget estimates for 2015-16. (BS)
- ❖ India's net industrial growth rate in 2012-13 was the slowest in a decade, at 1.8%, show revised estimates in the Annual Survey of Industries(ASI) data, released on Tuesday. (BS)

Domestic News

- ❖ HDFC Bank said Andhra Pradesh and the newly-formed Telangana stood top on the bank's high-growth avenues and added the regions would see expansion in branch network in the next two to 3 years. (BS)
- ❖ HMC-MM Auto the joint venture between Hero MotoCorp and Milan-headquartered Magneti Marelli, inaugurated its first autonomous production and development centre at Manesar, Haryana. (BS)
- ❖ Tata Power is acquiring 50 percent shares in a joint venture hydro electric power project in Zambia from its sister concern. On Wednesday, Tata Power announced it has entered into a stake purchase agreement with Tata Africa Holdings to purchase its 50 percent stake in an under construction project in Zambia. Zambian utility Zesco owns the remainder 50 percent in the project, which is expected to be complete in fourth quarter of 2015. (BS)

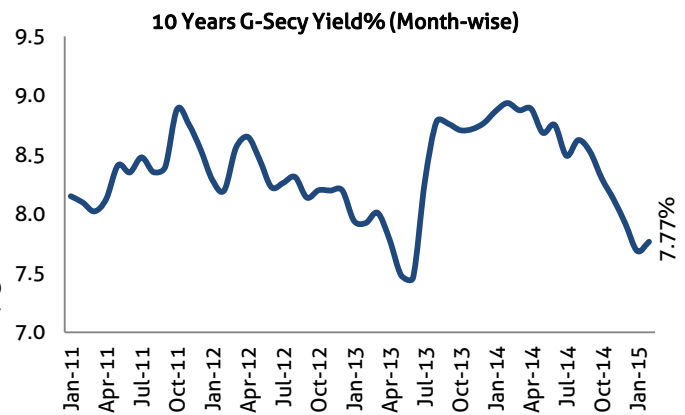
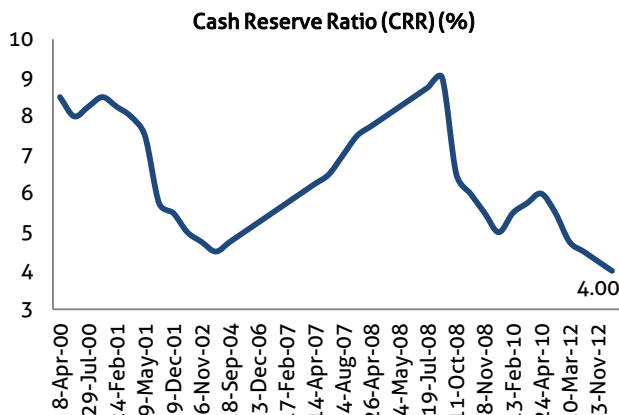
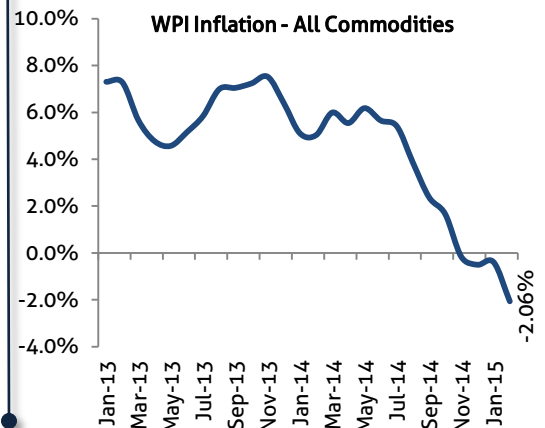
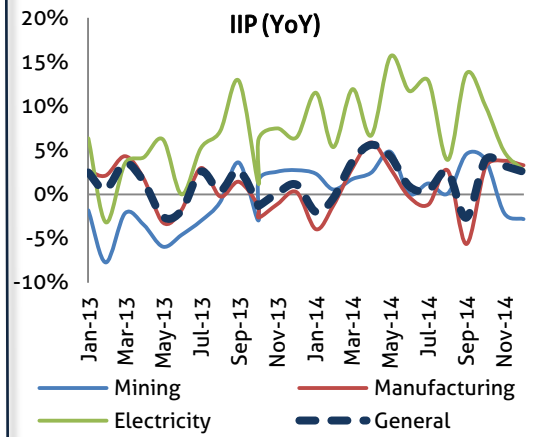
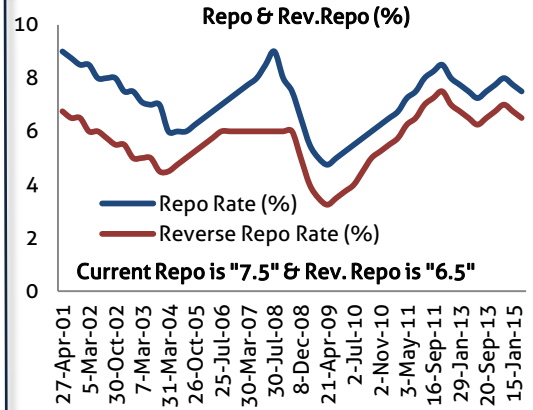
Global Forex	Closing	Chg	% Chg
EUR-USD	1.0975	0.0005	0.05
GBP-USD	1.4887	0.0007	0.05
USD-JPY	119.31	(0.18)	(0.15)

Bond Markets	Closing	Chg
10-yr bond	7.79	2.40 bps
Interbank call	7.29	-6.50 bps



Domestic News (Cont...)

- ❖ With most players in the sector looking to aggressively ramp up their teams, Noida-based mobile commerce platform Paytm plans to double its employee base in FY16 from around 3,000 currently. The company has added around 1,500 persons to its total headcount in FY15. (BS)
- ❖ The country's top airports will witness about 8% growth in daily departures with airlines adding flights in summer. (BS)
- ❖ Mahindra group and Godrej group which bought e-commerce players in niche areas such as baby care and gourmet food, want to replicate their business model online and leverage on physical stores. (BS)
- ❖ Hiking its stake in Delhi International Airport to 64%, GMR Infrastructure will acquire an additional 10% equity for USD 79 million from Malaysia Airports Holdings Berhad (MAHB), which is exiting the venture. (BS)
- ❖ Drug major Cipla announced the launch of generic drug Sofosbuvir for treating chronic Hepatitis C under the brand name 'Hepcvir', in India. (BS)
- ❖ Hindustan Construction Company Ltd (HCC) has secured an arbitration award of Rs 217.18 crore for the extension of time (EOT) cost claim in Lucknow - Muzaffarpur National Highway Project. Of the total award, Rs 135.15 crore is the principal amount and Rs 82.03 crore is the interest component. (BS)
- ❖ Sun Pharmaceutical said Ranbaxy will be delisted from the Indian bourses following the completion of their \$4-billion merger.
- ❖ Tata Motors, India's biggest automaker, has secured board of directors approval for a Rs 7,500 crore rights issue to fund its ongoing and future activities. (BS)
- ❖ Ipca Laboratories Ltd is aiming to make all of its plants facing import alerts from the United States compliant with U.S. Food and Drug Administration (USFDA) rules by December, an executive said on Wednesday. (BS)
- ❖ Sun Pharmaceutical Industries Ltd has completed its merger with Ranbaxy. The integration, planned by Sun Pharma over many months, will focus on supporting strong growth. (BS)
- ❖ The Foreign Investment Promotion Board has cleared 10 FDI proposals worth Rs 2,858 crore, and referred the Holcim-Ambuja deal to the CCEA. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Mar-15	Dynamatic Tech. Ltd.	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	SELL	300000	3616.7
25-Mar-15	AXISCADES Engg Tech Ltd	YUKTI SECURITIES PRIVATE LIMITED	SELL	380000	251.4
25-Mar-15	Hindustan Composites Ltd	BOROSIL GLASS WORKS LIMITED	BUY	49827	1100.0
25-Mar-15	AXISCADES Engg Tech Ltd	JUPITER CAPITAL PRIVATE LIMITED	SELL	145000	250.9
25-Mar-15	Asian Granito India Limit	AGL INFRASTRUCTURE PRIVATE LIMITED AGL INFRASTRUCTURE	BUY	183307	115.4

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Mar-15	UNITDSPR	CLSA GLOBAL MARKETS PTE LTD	B	2,155,518	3722.0
25-Mar-15	GODREJPROP	GODREJ INDUSTRIES LTD	S	3,510,000	257.0
25-Mar-15	AXISCADES	JUPITER CAPITAL PRIVATE LIMITED	S	1,920,459	230.1
25-Mar-15	SAURASHCEM	CLARENCE INVESTMENTS LIMITED	S	4,800,000	55.3
25-Mar-15	HINDCOMPOS	BOROSIL GLASS WORKS LIMITED	B	181,800	1100.0

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500165	KANSAINER	26-Mar-15	Stock Split from Rs.10/- to Re.1/-	27-Mar-15
534185	MGOLD	26-Mar-15	Temporary Suspension	27-Mar-15
522233	VHCLINDUS	26-Mar-15	BONUS 3:1	27-Mar-15
533269	WABAG	26-Mar-15	BONUS 1:1	27-Mar-15
506395	COROMANDEL	27-Mar-15	Interim Dividend - Rs.2.00	30-Mar-15
512319	RAJLXIN	27-Mar-15	Stock Split from Rs. 10/- to Re.1/-	30-Mar-15
535346	RMFINAFDD5	27-Mar-15	Temporary Suspension	30-Mar-15
535345	RMFINAFDG5	27-Mar-15	Temporary Suspension	30-Mar-15
535347	RMFINAFDR5	27-Mar-15	Temporary Suspension	30-Mar-15
535350	RMFINAFRD5	27-Mar-15	Temporary Suspension	30-Mar-15
535348	RMFINAFRG5	27-Mar-15	Temporary Suspension	30-Mar-15
535352	RMFINAFRR5	27-Mar-15	Temporary Suspension	30-Mar-15
505790	FAGBEARING	30-Mar-15	Dividend - Rs.7.50	-
500249	KSBPUMPS	30-Mar-15	Final Dividend - Rs.5.50	-
519421	KSE-\$	30-Mar-15	Interim Dividend - Rs.20.00	31-Mar-15
532081	KSERASERA-\$	30-Mar-15	Stock Split from Rs.10/- to Re.1/-	31-Mar-15
511187	MAHAINV	30-Mar-15	Stock Split from Rs.10/- to Re.1/-	31-Mar-15
500126	MERCK	30-Mar-15	Dividend - Rs.6.00	-
532254	POLARIS	30-Mar-15	Interim Dividend - Rs.5.00	31-Mar-15
501061	SBBJ	30-Mar-15	Interim Dividend - Rs.14.30	31-Mar-15
523411	ADCINDIA	06-Apr-15	Dividend - Rs.-	07-Apr-15
500830	COLPAL	08-Apr-15	3rd Interim Dividend - Rs.-	09-Apr-15

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
23-Mar-15	GBP	CBI Industrial Trends Orders (Mar)			10
23-Mar-15	USD	Chicago Fed National Activity (Feb)			0.13
23-Mar-15	USD	Existing Home Sales (Feb)		4.95M	4.82M
23-Mar-15	EUR	Consumer Confidence (Mar)		-5.8	-6.7
24-Mar-15	JPY	Manufacturing PMI (Mar)			51.6
24-Mar-15	CNY	HSBC Manufacturing PMI (Mar)			50.7
24-Mar-15	EUR	Manufacturing PMI (Mar)		51.5	51
24-Mar-15	EUR	Services PMI (Mar)		54	53.7
24-Mar-15	GBP	CPI (YoY) (Feb)			0.003
24-Mar-15	GBP	PPI Input (YoY) (Feb)			-0.142
24-Mar-15	GBP	PPI Output (YoY) (Feb)			-0.018
24-Mar-15	GBP	RPI (YoY) (Feb)			0.011
24-Mar-15	USD	CPI (YoY) (Feb)		-0.001	-0.001
24-Mar-15	USD	House Price Index (Jan)			218.6
24-Mar-15	USD	Manufacturing PMI (Mar)			55.1
24-Mar-15	USD	New Home Sales (Feb)		480K	481K
25-Mar-15	USD	MBA 30-Year Mortgage Rate			0.0399
25-Mar-15	USD	Durable Goods Orders (MoM) (Feb)		0.004	0.028
26-Mar-15	GBP	Retail Sales (YoY) (Feb)			0.054
27-Mar-15	USD	GDP (QoQ) (Q4)		0.024	0.022

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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