

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5916	1.36	CNX IT	6060	-1.58
Sensex	19407	1.19	BANK NIFTY	12727	1.46
DowJones	14701	0.17	S&P CNX 500	4624	1.14
Nasdaq	3290	0.62	CNX FMCG	15862	0.59
Hangseng	22657	1.15	CNX REALTY	246	-0.45
Shanghai	2194	-0.22	CNX AUTO	4542	2.66
Nikkei	13931	0.04	CNX ENERGY	8028	1.66
Strait Times	3348	0.32	CNX PHARMA	6557	2.40
Kospi	1949	-0.15	Advances / Declines	BSE	NSE
Taiwan	8068	0.58	Advances	1221	697
FTSE	6443	0.17	Declines	1158	598
CAC	3840	-0.06	Unchanged	133	73
DAX	7833	0.95	Total	2512	1368

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HDFC	885.35	5.64
NTPC	155.45	4.29
DRREDDY	1982	4.23
TATAMOTORS	292.5	3.91
HEROMOTOCO	1635	3.90

Nifty Losers		
Company	Price(Rs)	Chg(%)
HCLTECH	715.4	-2.29
TCS	1401	-2.07
DLF	242	-1.98
JPASSOCIAT	77.05	-1.72
INFY	2233	-1.29

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Sarda Energy-₹	9.84	0.06	167.9
Britannia Inds	4.13	0.06	65.07
Polaris Fin Tec	5.05	0.22	23.19
LIQUIDBEES	9.48	0.45	21.07
Spicejet	221.09	22.89	9.66

Indian Forex	Closing	Chg	% Chg
USD/INR	54.1715	0.128	0.24%
GBP/INR	82.9853	-0.108	-0.13%
EUR/INR	70.6215	0.1802	0.25%
JPY/INR	54.64	0.35	0.64%

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26815	586
Silver (Rs/1kg)	43500	867.5

Commodities	Price	% chg.
Crude (US\$/BBL)	92.3	3.22
Brent (US\$/BBL)	102.9	1.93
Gold (US/oz)	1478.6	0.83
Silver (US\$/oz)	24.5	-0.34
Copper (US\$/MT)	7035.0	0.87
Alum (US\$/MT)	1883.0	1.63
Zinc(US\$/MT)	1882.0	1.33

ADR	Cl. Values	% Chg.
ICICI Bank	46.02	-0.35
HDFC Bank	42.36	0.36
Infosys	40.86	0.15
Sterlite Inds.	6.70	2.29
Dr Reddy's Labs	36.43	3.20
Wipro	7.72	-1.53
Tata Motors	27.15	2.34

Market Sensor

U.S market closed off their best levels Thursday, but the S&P and Nasdaq still managed to finish higher for the fifth-straight session as investors cheered a batch of better-than-expected earnings and an upbeat jobless claims report. Dow Jones Industrial Average was up 0.17% or 24.50 points at 14700.80. Nasdaq Composite was up 0.62% or 20.33 points at 3289.99. Standard & Poor's 500 was up 0.40% or 6.37 points at 1585.16.

Indian market on the eve of April expiry opened on a firm note, remained sideways for the major half. Consistent buying at the latter took indices higher to close above the psychological level of 5900. Nifty ended the previous trading session with a gain of 1.36% or 79.40 points at 5916.30. On last trading session, FIIs bought net Rs.1449.7 Cr in cash market and bought net Rs 3672.63 Cr. in derivative segment. Whereas, DII sold net Rs 1269.43 Cr in cash segment.

Coming to today's trade, Nifty to maintain its positive fervor with crucial support presently placed at 5880.

Global News

- ❖ Japan's consumer prices fell the most in two years, underscoring the challenge facing Bank of Japan Governor Haruhiko Kuroda as he works to meet a 2 percent inflation target. (Bloomberg)
- ❖ Brazil's central bank may have to step up the pace of interest rate increases to tame above-target inflation, its director for economic policy, Carlos Hamilton, said. Swap rates rose. (Bloomberg)
- ❖ Applications for U.S. Unemployment benefits fell to a six-week low, a sign the labor market is improving after a setback last month. (Bloomberg)
- ❖ Federal Reserve Vice Chairman has fought for more than a decade to put attacking unemployment and boosting growth on an equal footing with fighting inflation at the heart of the Fed's policy. (Bloomberg)
- ❖ The International Monetary Fund said that monetary policy should remain accommodative to boost growth in advanced economies, while complaints about competitive currency devaluation appear "overstated." (Bloomberg)
- ❖ China's financial and capital account surplus surged in the first quarter as looser monetary policies in developed economies and expectations of yuan gains spurred inflows of funds. (Bloomberg)

Economic News

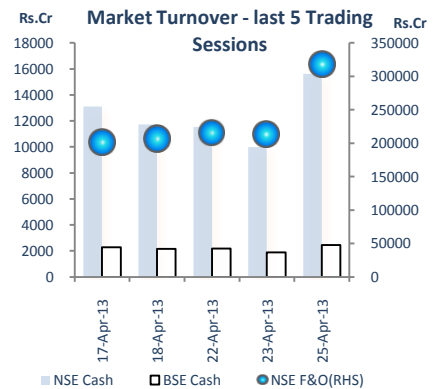
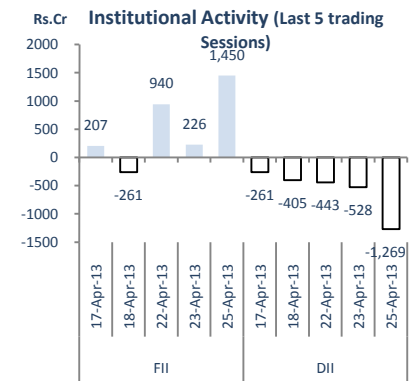
- ❖ Riding on 'bold and tough' decisions, India made a case for upgrade of its ratings by Standard & Poor's from the current lowest investment grade, instead of a downgrade as warned by S&P along with Fitch Ratings. (BS)
- ❖ After Prime Minister's Economic Advisory Council (PMEAC), a surveillance note by G-20 cautioned India that its economic growth could be dragged down due to stalling of investment caused by policy uncertainty and regulatory obstacles, besides infrastructure and labour market obstacles. (BS)
- ❖ President Pranab Mukherjee expressed hope that the country's growth rate would return to the 8% level in next couple of years. (BS)
- ❖ Slackened progress in road building is mainly on account of various issues including delays in environment and forest clearance and land acquisition, Parliament was informed. (BS)
- ❖ The Tamil Nadu government proposed a series of power generation and related infrastructure development projects worth around Rs 20,000 crore, including a Rs 7,000 crore underground hydel power station in Nilgiris district. (BS)
- ❖ A 5% increase in royalty rate for iron ore, as proposed by the Centre, will make substantial portion of mining the ore in the country unviable, an industry body has said. (BS)

Domestic News

- ❖ Domestic air travel showed positive growth in March for the first time in several months, according to the data released by Directorate General of Civil Aviation. (BS)
- ❖ Jindal Petroleum, a group firm of Jindal Steel and Power, has discovered crude oil in one of its blocks in Georgia and is planning to invest \$100 million on development of its blocks in the East European country. (BS)
- ❖ Infotech Enterprises, an engineering-focussed IT solutions provider, said net profit for the March quarter fell by 23% to Rs 54 crore mainly due to drop in other income. (BS)
- ❖ Bharat Sanchar Nigam Limited (BSNL) has filed an affidavit before the Supreme Court regarding the 3G intra-circle roaming issue, saying that the special leave petition filed by Bharti Airtel should be "dismissed with costs". (BS)
- ❖ Tata group firm Rallis India posted 14% jump in consolidated net profit at Rs 11.26 crore during its fourth quarter ended March 31 on strong growth in sales. (BS)
- ❖ Highway developer Ashoka Concessions and its private equity partner, SBI Macquarie are sitting on a pipeline of 25 highway projects for which they have qualified. (BS)
- ❖ Hit hard by rising interest burden and lower sales realisations, Jindal Steel and Power's (JSPL) consolidated net profit fell by nearly 35% to Rs 760.27 crore for the quarter ended March 31, 2013. (BS)
- ❖ After a quarter of good volume growth in minutes coupled with stable tariffs, Idea Cellular announced maiden dividend to its shareholders, after 16 years of operations. As per the board decision which is yet to be vetted by shareholders, it plans to distribute three% dividend, accounting to a payout of Rs 116 crore, including dividend distribution tax. (BS)
- ❖ Royal Bank of Scotland (RBS) offloaded 4.62% stake in Hyderabad-based SKS Microfinance for about Rs 63.50 crore. (BS)

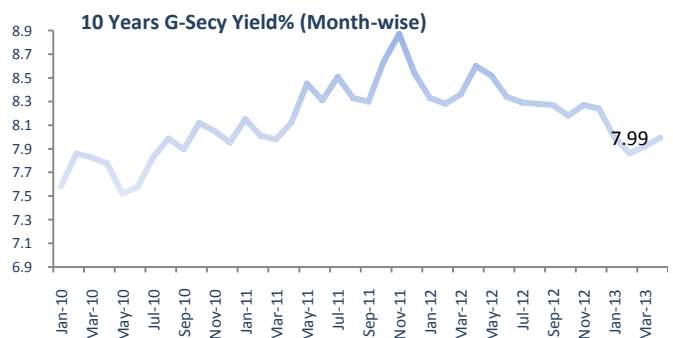
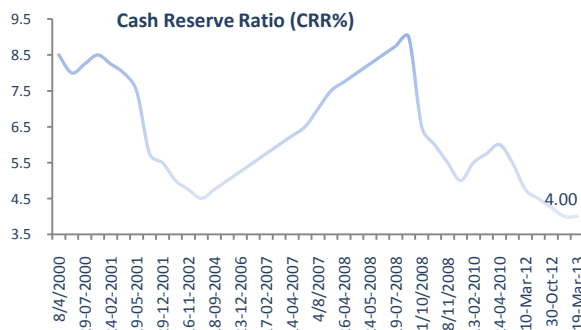
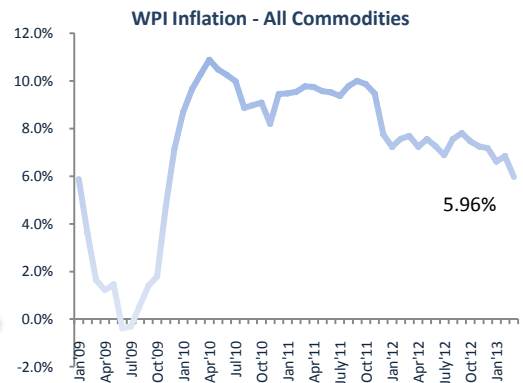
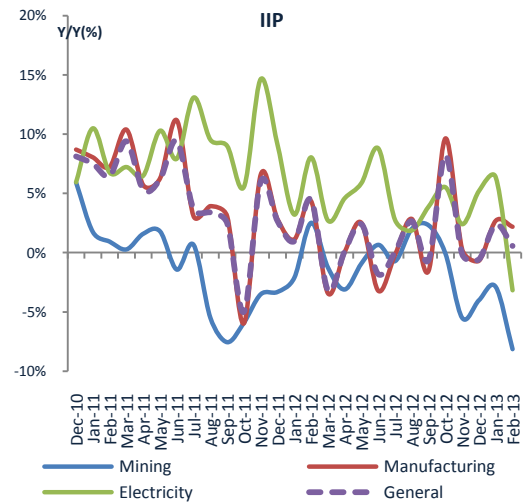
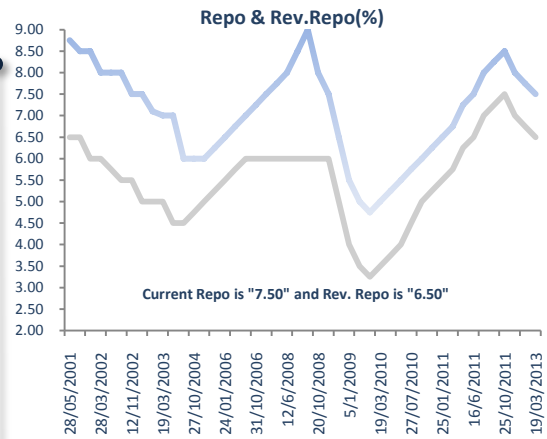
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3033	0.0024	0.17%
GBP-USD	1.5464	0.0029	0.19%
USD-JPY	98.830	-0.4300	-0.43%

Bond Markets	Closing	Chg
10-yr bond	7.72	-1.0 bps
Interbank call	7.59	3 bps



Domestic News(Conti..)

- ❖ Monnet Ispat & Energy said it has raised Rs 175 crore by issuing shares on preferential basis. (BS)
- ❖ Drug firm Granules India reported 24.96 % decline in net profit at Rs 11.09 crore for the fourth quarter ended March 31, 2013. (BS)
- ❖ State-owned IDBI Bank posted 28% decline in net profit at Rs 554.45 crore for the fourth quarter ended March 31, 2013 on account of rise in bad loans. (BS)
- ❖ NIIT Technologies, announced that it has signed a multi-year contract worth Rs 344 crore with the Airports Authority of India (AAI) for the implementation of Airport Operations Control Centers (AOCC), in partnership with SITA, the global air transport IT and communication specialist. (BS)
- ❖ Silver is just a by-product for Hindustan Zinc Ltd (HZL), part of London-listed Vedanta Resources,. Bu tthe boom in silver prices a few years ago coupled with its zinc and lead expansion, the company said that by 2012, the company will produce 500 tonne of silver. However, in the year ended March 31, 2013, the company managed to produce 408 tonne only. (BS)
- ❖ The biotechnology sector in India will achieve a revenue of \$11.6 billion in 2017, growing at a CAGR of 22%, according to a recent report from Ernst & Young. (BS)
- ❖ Footwear retailer Bata India reported nearly 7% increase in its standalone net profit for the quarter ended March 31 at Rs 38.46 crore. (BS)
- ❖ State-owned Hindustan Petroleum Corp Ltd (HPCL) has approved the incorporation of a joint venture company to set up Rs 37,320-crore oil refinery and petrochemical complex in Rajasthan. (BS)
- ❖ Global venture capital funding in the wind sector rebounded in the first quarter of 2013 with flow of \$ 16 million through three deals, says clean energy communications and consulting firm Mercom Capital Group. (BS)
- ❖ Tata Power said it has commissioned its 21-MW wind power project in Rajasthan. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Apr-13	SKS Microfinance Ltd	MERRILL LYNCH CAPITAL MARKETS ESPANA S.A. SVB	BUY	4995331	127.09
25-Apr-13	Raymond Ltd.	SOCIETE GENERALE	SELL	381000	278.84
25-Apr-13	Sarda Energy & Min Ltd	ORANGE MAURITIUS INVETMENTS LTD	SELL	887500	107.5
25-Apr-13	IVRCL Limited	AMBIT SECURITIES BROKING PVT. LTD.	BUY	3129334	21.32
25-Apr-13	Alok Industries Limited	RARE ENTERPRISES	BUY	5000000	10.24

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Apr-13	Sarda Energy-\$	ORANGE MAURITIUS INVETMENTS LTD	S	887500	109.50
25-Apr-13	RADGLOBAL	ATTRIBUTE SHARES & SECURITIES PVT LTD	B	468750	79.88
25-Apr-13	TCPL Pack-\$	ACCURA FORM PVT LTD	B	140300	75
25-Apr-13	Lok Housing-\$	LGNC LTD	S	450000	15
25-Apr-13	Aanjaneya Lifecare	CHETAN RASIKLAL SHAH	B	78219	76.04

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Rs.
500092	CRISIL	25-Apr-13	Interim Dividend	3
507488	GM Breweries	26-Apr-13	Dividend	2.5
531695	SHREYCHEM	26-Apr-13	Stock Split from Rs. 10/- to Rs. 5/-	-
506803	Fulford India-\$	29-Apr-13	Final Dividend	1
500002	ABB	30-Apr-13	Final Dividend	3
509496	ITD Cem India	30-Apr-13	Dividend	2
532891	Puravankara Proj	30-Apr-13	Interim Dividend	2.5
532735	R Systems	30-Apr-13	Final Dividend	7.5
590031	De Nora India	2-May-13	Final Dividend	7
500150	Foseco India	2-May-13	1st Interim Dividend	1.5
531642	Marico	3-May-13	2nd Interim Dividend	-
532819	Mindtree	3-May-13	2nd Interim Dividend	-
500387	Shree Cement	3-May-13	Interim Dividend	-
532343	TVS Motor	3-May-13	2nd Interim Dividend	-
523457	LINDEINDIA	6-May-13	Dividend	1.5
500068	Disa India	7-May-13	Dividend	-
532424	Godrej Cons	8-May-13	Interim Dividend	-
500530	Bosch	10-May-13	Dividend	60
500325	RIL	10-May-13	Dividend	9
520056	Sundaram Clayton	13-May-13	2nd Interim Dividend	-
523574	FRL	20-May-13	Dividend	1.1
570002	FRLDVR	20-May-13	Dividend	1.14

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
4/22/2013	EUR	Consumer Confidence			-23.5
4/22/2013	USD	Existing Home Sales		5.01M	4.98M
4/23/2013	EUR	Manufacturing PMI		47.1	46.8
4/23/2013	CAD	Core Retail Sales (MoM)			0.50%
4/23/2013	USD	Manufacturing PMI		54.7	54.6
4/23/2013	USD	New Home Sales		420K	411K
4/24/2013	AUD	CPI (QoQ)			0.20%
4/24/2013	GBP	CBI Distributive Trades Survey			
4/24/2013	USD	Core Durable Goods Orders (MoM)		0.60%	-0.70%
4/24/2013	USD	Durable Goods Orders (MoM)		-1.90%	5.60%
4/25/2013	GBP	GBP Gross Domestic Product (YoY) (1Q A)			0.20%
4/25/2013	USD	USD Initial Jobless Claims (APR 19)			346K
4/25/2013	USD	KC Fed Manufacturing			-5
4/26/2013	JPY	Bank of Japan Monetary Policy Statement			
4/26/2013	JPY	Manufacturing PMI			50.4
4/26/2013	JPY	Tokyo Core CPI (YoY)			-0.50%
4/26/2013	USD	GDP (QoQ)		3.00%	0.40%
4/26/2013	USD	Michigan Consumer Sentiment			72.3
4/22/2013	EUR	Consumer Confidence			-23.5
4/22/2013	USD	Existing Home Sales		5.01M	4.98M
4/23/2013	EUR	Manufacturing PMI		47.1	46.8

Date	Curr.	Event	Actual	Forecast	Previous

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