

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7569	(0.14)	CNX IT	9588	0.18
Sensex	25314	(0.22)	BANK NIFTY	15238	(0.47)
DowJones	16868	0.29	S&P CNX 500	6115	0.02
Nasdaq	4380	0.68	CNX FMCG	17259	(0.25)
Hangseng	23066	0.87	CNX REALTY	3821	0.44
Shanghai	2038	0.61	CNX AUTO	6792	0.96
Nikkei	15311	0.29	CNX ENERGY	10115	(0.41)
Strait Times	3272	0.34	CNX PHARMA	8105	0.57
Kospi	1989	0.39	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9313	0.76	Advances	1681	627
FTSE	6734	(0.79)	Declines	1350	525
CAC	4461	(1.28)	Unchanged	111	29
DAX	9868	(0.71)	Total	3142	1181

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BAJAJ-AUTO	2283.00	2.78
MARUTI	2464.00	2.05
LUPIN	1027.00	1.76
GAIL	467.00	1.63
HINDUNILVR	626.30	1.63

Nifty Losers		
Company	Price(Rs)	Chg(%)
ITC	315.60	(1.53)
IDFC	128.00	(1.50)
ICICIBANK	1418.10	(1.47)
ONGC	436.70	(1.41)
DLF	216.10	(1.41)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Info Edge India	2.10	0.0	85
Kakatiya Cem	4.05	0.1	75
GODREJ PROP	18.14	0.3	58
Thermax	1.29	0.0	31
Wheels India	1.99	0.1	25

Indian Forex	Closing	Chg	% Chg
USD/INR	60.279	0.174	0.29
GBP/INR	102.281	(0.042)	(0.04)
EUR/INR	82.048	0.296	0.36
JPY/INR	59.150	0.210	0.36

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28150	(150)
Silver (Rs/1kg)	44264	(556)

Commodities	Price	% Chg.
Crude (US\$/BBL)	106.6	(0.10)
Brent (US\$/BBL)	114.0	(0.18)
Gold (US/oz)	1318.9	0.25
Silver (US\$/oz)	21.0	0.62
Copper (US\$/MT)	6890.5	(0.12)
Alum (US\$/MT)	1866.5	0.43
Zinc(US\$/MT)	2169.5	(0.60)

ADR	Cl. Values	% Chg.
ICICI Bank	48.97	(0.61)
HDFC Bank	46.14	(0.97)
Infosys	53.33	0.40
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	40.97	0.48
Wipro	11.48	0.12
Tata Motors	39.38	(0.30)

## Market Sensor

US market rose on Wednesday, with the Dow and S&P 500 bouncing back after a two-day decline, as Wall Street wagered the economy is rebounding from its worst quarterly performance in five years. Dow Jones Industrial Average was up 0.29% or 49.38 points at 16867.51. Nasdaq Composite was up 0.68% or 29.40 points at 4379.76. Standard & Poor's 500 was up 0.49% or 9.55 points at 1959.53.

Indian Equity market ended the previous trading session on a flat note with negative bias. Nifty ended the previous trading session with a decline of 0.14% or 10.95 points at 7569.25. On Wednesday's trading session, FII's bought net Rs.694.63 Cr in cash market and sold net Rs.1012.25 in derivative segment. Whereas, DII sold net Rs.433.63 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7540 followed by 7500 while resistance is seen at 7620 followed by 7680.**

## Global News

❖The U.S. economy contracted in the first quarter by the most since the depths of the last recession as consumer spending cooled. Gross domestic product fell at a 2.9 percent annualized rate, more than forecast.(Bloomberg)

❖The Federal Reserve's lower-for-longer interest rate stance is spurring stocks and bonds as volatility subsides. It's also fueling inflation expectations that threaten to bring asset prices tumbling down. (Bloomberg)

❖Treasuries rose, sending yields on benchmark 10-year notes to a three-week low, as reports showed the U.S. economy contracted more than forecast last quarter and demand for durable goods decreased. (Bloomberg)

❖China's chief auditor said growth in local government debt slowed, a sign that tighter scrutiny on borrowing and an economic slowdown have curbed credit.(Bloomberg)

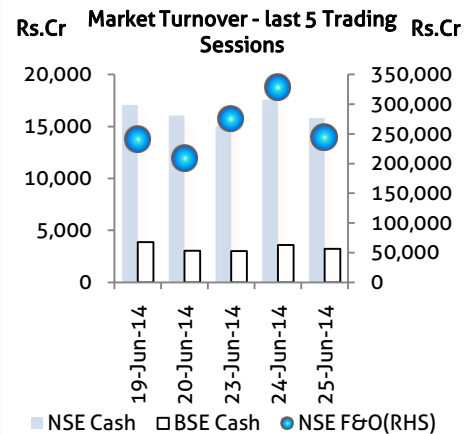
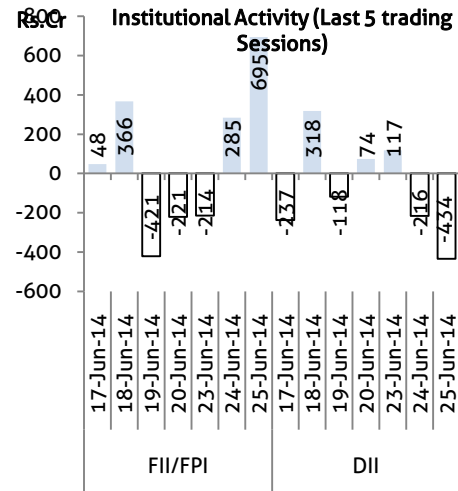
❖China's central bank expanded banks' freedom to set foreign-currency deposit rates to all of Shanghai from the city's free-trade zone, a step toward easing controls across the nation. (Bloomberg)

## Economic News

- ❖ The government has set up an 'Advisory Group' to be headed by former Power Minister Suresh Prabhu for integrated development of the power, coal and renewable energy sectors in a bid to ensure 24x7 electricity supply to consumers. (BS)
- ❖ The Cabinet Committee on Economic Affairs (CCEA) Wednesday deferred a decision on the new price for domestic natural gas awaited by producers by three months, pending a review of the price approved by the previous government. (BS)
- ❖ The government announced Rs 50 per quintal increase in the minimum support price of paddy to Rs 1,360 to encourage farmers to cultivate rice, but said that the decision will not have an impact on inflation. (BS)
- ❖ The Finance Ministry has proposed allowing retirement and gratuity funds to invest up to 30% of their money in the equity market, a suggestion that's likely to be opposed by labour unions. (BS)
- ❖ In a relief to the automobile and consumer durable sectors, the government extended the excise duty concession by six months to December 31. (BS)
- ❖ At a time state-run coal major is drawing flak from all quarters for coal shortage across the country, the Coal ministry has sought details of Coal India projects stuck due to environmental issues to push for early clearances. The ministry is also likely to appoint nodal officers for each of theCIL subsidiaries to monitor these long-pending projects. (BS)
- ❖ The Centre said the situation in Iraq was a matter of concern and hoped that the turmoil in the Gulf country will not affect the oil supplies to India. (BS)
- ❖ With Coal Ministry rejecting the Power Ministry's request to provide fuel to 9940 MW plants of companies like Essar Power, GMR and Power, the latter has sought intervention of Coal and Power Minister Piyush Goyal into the matter. (BS)
- ❖ Union minister for rural development Nitin Gadkari will take a review meeting with all state chief ministers of the Land acquisition law. (BS)
- ❖ Oil minister Dharmendra Pradhan will attend a cabinet meeting on Wednesday, a government source said, amid speculation that India could raise gas prices from July 1. (BS)
- ❖ Projects to widen seven state highways in Uttar Pradesh to four lanes have failed to take off. Even after tenders were floated five times, no company or private contractor came up to take the job, an official said Wednesday. (BS)
- ❖ Cooperation from government is necessary in making housing segment viable for buyers in the wake of soaring land prices, according to a leading city based real estate developer here. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3632	0.0003	0.02
GBP-USD	1.6989	0.0006	0.04
USD-JPY	101.77	(0.10)	(0.10)

Bond Markets	Closing	Chg
10-yr bond	8.75	-0.6 bps
Interbank call	8.97	-17.0 bps



## Domestic News

- ❖ NTPC Ltd, the country's biggest power generating utility, has sought lifting of load restriction on its two Stage-I units, each of 500 Mw at its 3000 Mw (5x600) plant at Kaniha near Talcher. (BS)
- ❖ Rural subscriber base for GSM telephony services grew marginally to 300.63 million users in May this year compared to the previous month, industry body COAI said. (BS)
- ❖ ICICI Bank in association with Delhi Metro Rail Corporation (DMRC) launched co-branded card with host of benefits for metro riders. (BS)

## Domestic News (Cont...)

❖ Avanse Education Finance Services, a group company of Dewan Housing Finance, is planning to give loans to educational institutions this year. The loans will be given only to established institutions and for expansion, said Neeraj Saxena, CEO of the Avanse. (BS)

❖ India's largest IT services provider Tata Consultancy Services (TCS), said that it has been selected by Dutch insurance firm, REAAL N.V., to develop and modernize the mainframe applications and servicing the company's 'life insurance' portfolio. (BS)

❖ Private equity firm ASK Group said it has exited its investment in a Pune residential project, developed by realty player Darode Jog Properties, for Rs 87 crore. (BS)

❖ Norwegian telecom giant Telenor has selected Tata Consultancy Services Ltd to modernise its fixed-line network operations. The infrastructure services contract, which was signed on 24 June, is for four years. (BS)

❖ Global media and entertainment industry services leader Prime Focus Limited has announced the merger of its creative services subsidiary Prime Focus World (PFW) and Double Negative (DNeg), one of the largest visual effects services providers to the global film industry. (BS)

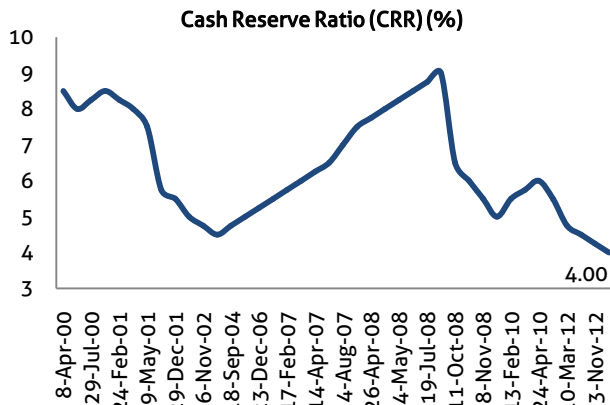
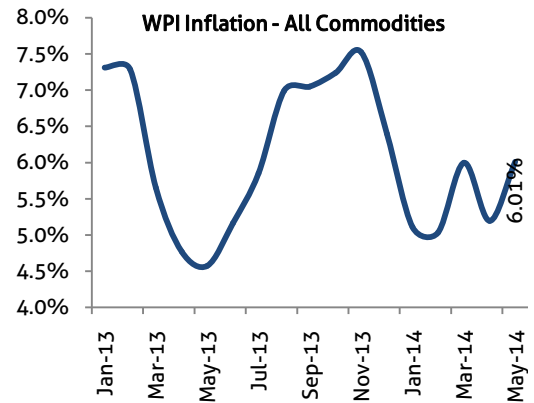
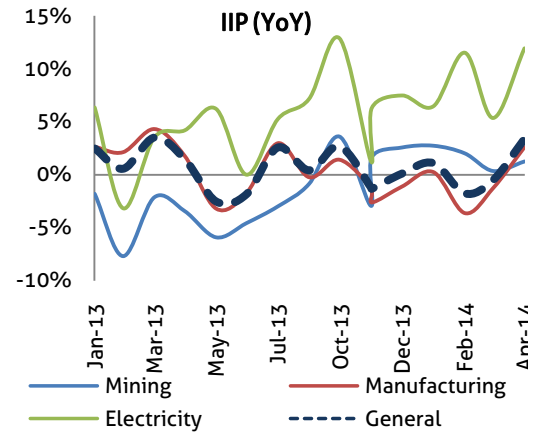
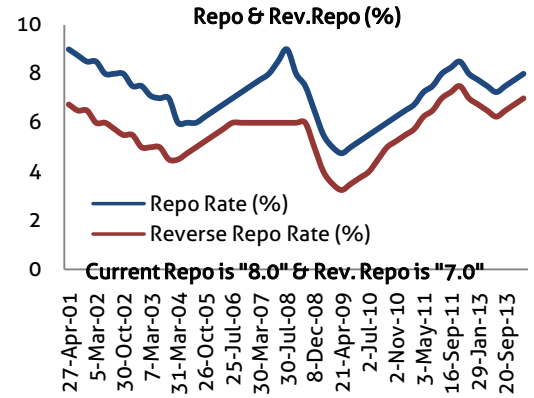
❖ Reeling under prolonged demand slump, automobile and consumer durables firms welcomed the government's decision to extend reduced excise rates till December 31, saying it would give a boost to the sectors. (BS)

❖ Welcoming Finance Minister Arun Jaitley's move to extend excise duty concession till December 31, consumer durables firms said it will help the sector which has seen some growth in the last six months after two years of stagnation. (BS)

❖ The Competition Commission has rejected allegations that Wipro GE Healthcare had abused its dominant market position with respect to sale and repair of medical equipment. (BS)

❖ Private sector HDFC Ergo General Insurance said it has signed a multi-year application outsourcing agreement with Accenture under which the software firm will develop, implement and manage a range of existing digital applications for the insurer. (BS)

❖ Commercial vehicles maker AMW Motors has tied up with L&T Finance to provide retail financing options for its range of medium and heavy haulage vehicles and tippers, the company said. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jun-14	NRB Bearings Limited	TRILOCHAN SANT Singh SAHNEY	SELL	1900000	83.0
25-Jun-14	Sanghvi Movers Ltd.	VISU ASSOCIATES	SELL	563978	141.5
25-Jun-14	Kakatiya Cements Ltd	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	99122	141.0
25-Jun-14	Aries Agro Limited	BLACKROCK SECURITIES PRIVATE LIMITED	SELL	111208	82.3
25-Jun-14	Parenteral Drugs Ltd	SYSTEMATIX FINCORP INDIA LIMITED	SELL	250000	26.9

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jun-14	GODREJ PROP	GODREJ INDUSTRIES LTD	S	1,700,000	237.4
25-Jun-14	Ador Fontech-\$	GITA MEHTA	S	109,927	97.0
25-Jun-14	Naisargik Agri	ALD PROMOTERS PRIVATE LIMITED	B	65,000	153.0
25-Jun-14	Kakatiya Cem	GAJANAN ENTERPRISES	B	54,844	142.2
25-Jun-14	Graviss Hospitality	RAVI GHAI	S	424,076	18.3

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
517354	Havells India	26-Jun-14	Final Dividend - Rs.10.00	-
500116	IDBI Bank	26-Jun-14	Final Dividend - Rs.0.28	-
500304	NIIT	26-Jun-14	Dividend - Rs.1.60	-
532541	NIIT Tech	26-Jun-14	Dividend - Rs.9.00	-
531626	Orosil Smiths-\$	26-Jun-14	Stock Split from Rs.10/- to Rs.5/-	28-Jun-14
526849	Banaras Beads	27-Jun-14	Dividend - Rs.2.00	-
532346	Blue Star Info	27-Jun-14	Dividend - Rs.4.00	-
500096	Dabur India	27-Jun-14	Final Dividend - Rs.1.00	-
531209	Nucleus Soft	27-Jun-14	Special Dividend - Rs.3.00	-
531209	Nucleus Soft	27-Jun-14	Special Dividend - Rs.3.00	-
531209	Nucleus Soft	27-Jun-14	Final Dividend - Rs.3.00	-
531209	Nucleus Soft	27-Jun-14	Final Dividend - Rs.3.00	-
532419	Smartlink Net	27-Jun-14	Dividend - Rs.2.00	-
524394	Vimta Labs-\$	27-Jun-14	Dividend - Rs.2.00	-
507880	VIP Inds-\$	27-Jun-14	Final Dividend - Rs.1.20	-
534742	Zuari Agro	27-Jun-14	Dividend - Rs.3.00	-
500780	Zuari Global	27-Jun-14	Dividend - Rs.1.00	-
500135	Essel Propack	30-Jun-14	Dividend - Rs.1.25	-
530997	Unique Organics	30-Jun-14	Dividend - Rs.2.00	-
524348	Aarti Drugs	02-Jul-14	Final Dividend - Rs.5.50	-
532927	Eclerx Serv	02-Jul-14	Dividend - Rs.35.00	-
500314	Oriental Hotels	02-Jul-14	Dividend - Rs.0.55	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
23-Jun-14	CNY	Chinese HSBC Manufacturing PMI		49.7	49.4
23-Jun-14	EUR	Manufacturing PMI		52.2	52.2
23-Jun-14	EUR	Services PMI		53.3	53.2
23-Jun-14	USD	Chicago Fed National Activity			-0.32
23-Jun-14	USD	Existing Home Sales		4.73M	4.65M
24-Jun-14	USD	House Price Index (MoM)			0.70%
24-Jun-14	USD	S&P/CS HPI Composite - 20 (YoY)		11.50%	12.40%
24-Jun-14	USD	CB Consumer Confidence		83.5	83
24-Jun-14	USD	New Home Sales		440K	433K
24-Jun-14	USD	Richmond Manufacturing Index			7
25-Jun-14	USD	MBA 30-Year Mortgage Rate			4.36%
25-Jun-14	USD	Durable Goods Orders (MoM)		0.20%	0.60%
26-Jun-14	GBP	Current Account			-22.4B
26-Jun-14	GBP	GDP (YoY)			3.10%
26-Jun-14	USD	Continuing Jobless Claims		2,570K	2,561K
26-Jun-14	USD	Core PCE Price Index (MoM)		0.20%	0.20%
26-Jun-14	USD	Initial Jobless Claims		310K	312K
26-Jun-14	USD	Personal Spending (MoM)		0.40%	-0.10%
26-Jun-14	USD	KC Fed Manufacturing			10
27-Jun-14	JPY	Household Spending (YoY)		-2.00%	-4.60%
27-Jun-14	JPY	National Core CPI (YoY)		3.40%	3.20%
27-Jun-14	JPY	Tokyo CPI (YoY)			3.10%
27-Jun-14	GBP	Current Account		-17.5B	-22.4B
27-Jun-14	GBP	GDP (YoY)		3.10%	3.10%
27-Jun-14	EUR	Consumer Confidence		-7	-7.1
27-Jun-14	EUR	Industrial Sentiment		-3	-3

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
25-Jun-14	INR	Indian M3 Money Supply			
27-Jun-14	INR	Indian Bank Loan Growth			

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