

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5,908	(1.39)	CNX IT	7,678	0.12
Sensex	19,805	(1.42)	BANK NIFTY	10,614	(0.99)
DowJones	15,556	0.09	S&P CNX 500	4,532	(1.23)
Nasdaq	3,605	0.71	CNX FMCG	18,686	(3.40)
Hangseng	21,945	0.20	CNX REALTY	185	(0.49)
Shanghai	2,020	(0.07)	CNX AUTO	4,548	0.25
Nikkei	14,269	(2.01)	CNX ENERGY	8,033	(1.47)
Strait Times	3,245	0.29	CNX PHARMA	7,130	(1.75)
Kospi	1,912	0.14	Advances / Declines	BSE	NSE
Taiwan	8,158	(0.07)	Advances	618	424
FTSE	6,588	(0.49)	Declines	1079	887
CAC	3,956	(0.17)	Unchanged	172	81
DAX	8,299	(0.96)	Total	1869	1392

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HEROMOTOCO	1831.95	4.41
ASIANPAINT	5100.00	2.29
BPCL	352.30	1.22
TATAMOTORS	300.00	0.91
AXISBANK	1129.95	0.43

Nifty Losers		
Company	Price(Rs)	Chg(%)
AMBUJACEM	170.90	(10.62)
JPASSOCIAT	42.85	(9.31)
ITC	358.00	(4.74)
HINDUNILVR	683.50	(3.66)
TATAPOWER	89.25	(3.41)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Redington India	13.22	1.36	9.73
Vardhman Tex	5.20	0.64	8.15
Tata Comm	11.37	1.56	7.30
Muthoot Fin	10.33	1.61	6.41
Zee Entert	22.84	4.05	5.64

Indian Forex	Closing	Chg	% Chg
USD/INR	58.9415	(0.5050)	(0.85)
GBP/INR	90.4752	(0.7692)	(0.84)
EUR/INR	77.8668	(0.5687)	(0.73)
JPY/INR	59.0100	(0.5000)	(0.84)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27,343	(330)
Silver (Rs/1kg)	40,510	(857)

Commodities	Price	% chg.
Crude (US\$/BBL)	105.6	0.09
Brent (US\$/BBL)	107.8	0.12
Gold (US/oz)	1,339.3	0.40
Silver (US\$/oz)	20.3	0.20
Copper (US\$/MT)	6,927.5	(1.12)
Alum (US\$/MT)	1,784.5	(1.56)
Zinc(US\$/MT)	1,839.0	(1.09)

ADR	Cl. Values	% Chg.
ICICI Bank	34.98	0.87
HDFC Bank	36.04	0.08
Infosys	49.95	0.79
Sterlite Inds.	5.73	1.24
Dr Reddy's Labs	39.42	(0.23)
Wipro	8.24	0.86
Tata Motors	25.25	0.96

Market Sensor

U.S market eked out small gains in volatile trading Thursday, lifted by materials, as investors digested the latest round of corporate earnings. Dow Jones Industrial Average was up 0.09% or 13.370 points at 15555.61. Nasdaq Composite was up 0.71% or 25.59 points at 3605.19. Standard & Poor's 500 was up 0.26% or 4.31 points at 1690.25.

Indian market ended the July expiry on a negative note, weak global cues and RBIs tightened measure pulled the market down. Nifty ended the previous trading session with a decline of 1.39% or 83.00 points at 5907.50. On Friday's trading session, FIIs sold net Rs.442.94 Cr in cash market and bought net Rs 1269.62 Cr. in derivative segment. Whereas, DII sold net Rs.138.8 Cr in cash segment.

Coming to today's trade, if Nifty is able to sustain above the psychological level of 5900 might result in minor pullback in the Indices.

Global News

- ❖ American factories received more orders for automobiles and machinery in June, pointing to a pickup in manufacturing that will help propel the world's largest economy in the second half of 2013. (Bloomberg)
- ❖ CapitaLand Ltd. (CAPL), Singapore's biggest developer, may alter the size of its apartments as it seeks to improve affordability to combat government measures aimed at curbing speculation and lowering prices. (Bloomberg)
- ❖ Russia's economy will probably grow less than previously forecast from April to September as risks mount of a recession in the world's largest energy exporter. (Bloomberg)
- ❖ Japan consumer prices rose the most since 2008 in June, an early sign that the world's third-biggest economy may be starting to shake off 15 years of deflation. (Bloomberg)
- ❖ U.S. stocks rose and Treasuries reversed earlier declines amid speculation over when the Federal Reserve may reduce its stimulus measures. The dollar fell while gold advanced. (Bloomberg)
- ❖ More Americans filed for unemployment benefits last week as annual auto-plant shutdowns continued to affect data. (Bloomberg)

Economic News

❖ Planning Commission member Arun Maira said the country needed a plan to accelerate progress on all the three tracks - economic growth, social inclusion and environmental sustainability - simultaneously. However, histories of other nations as well as India's own recent experience have shown this trinity is not easy to realise, according to him. (BS)

❖ West Bengal Chief Minister Mamata Banerjee will announce some measures at a meet with bankers and industrialists in Mumbai on August 1 to attract investment, a state minister said. (BS)

❖ The recently promulgated National Food Security ordinance, which aims to provide 5 kg food grains per person per month at subsidised prices under the targeted public distribution system, might be in violation of the global trading rules on agriculture under the World Trade Organization (WTO) if an attempt is made to divert subsidized food grains for export purposes. (BS)

❖ Market regulator Sebi has received RTI requests for information related to matters that are more than 17 years old, even as the files pertaining to such cases are kept in its records for up to eight years only. (BS)

❖ Government is battling gold imports with a vengeance. It seems to be winning small battles but there is no way it can win the war. Within a month of introducing curbs, RBI withdrew the circular banning consignment imports for domestic use and 100% cash margin. These measures were considered too harsh which led to a sharp drop in imports. Gold imports fell by 80% of their May imports after imposition of these measures. (BS)

Domestic News

❖ Lenders to debt stricken Winsome Diamonds Ltd and Forever Precious Jewellery Ltd have asked its promoter Jatin Mehta to agree to bring in promoters' contribution upfront to decide future fate of debt recast package. (BS)

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❖ Chennai based Shriram City Union Finance (SCUF), reported 13.5% rise in net profit at Rs 117 crore in the first quarter. (BS)

❖ Honda Motorcycle & Scooter India Pvt. Ltd. (HMSI) rolled out first batch of its largest selling automatic scooter, Activa, from its third plant at Narsapura, near Bangalore. With this ramp up, Honda has started production in the second line at the third plant. (BS)

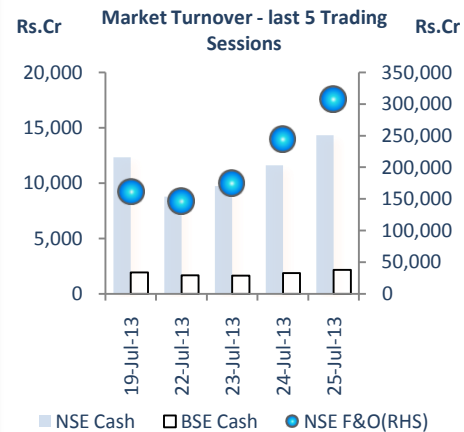
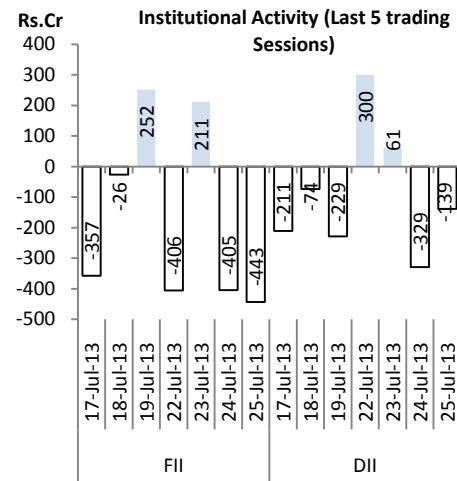
❖ Standard & Poor's Ratings Services revised its outlook on Tata Motors to stable from positive and affirmed its 'BB' long-term corporate credit rating. The rating agency also affirmed the 'BB' long-term issue ratings on the company's senior unsecured notes. (BS)

❖ Birla Corporation has reported a net profit of Rs 45.99 crore in the first quarter of FY14 as against Rs 84.74 crore in a year ago period, a fall of 45.73% (BS)

❖ India is in talks to export natural gas to Pakistan through a pipeline from Punjab to help the country overcome crippling energy shortage. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3281	0.0003	0.03
GBP-USD	1.5398	0.0008	0.05
USD-JPY	99.03	-0.25	-0.26

Bond Markets	Closing	Chg
10-yr bond	8.22	-19.2 bps
Interbank call	6.30	-70 bps



Domestic News(Conti..)

❖ Swiss firm Holcim's move to restructure shareholding in its India units -- ACC Ltd and Ambuja Cements is unlikely to benefit minorityshareholders in the near-term, brokerage firms said . (BS)

❖ Vijay Mallya, the chairman of UB Group who is battling to douse many a fire across his various of group companies, has managed to claw back close to a percent stake in one of his companies - Mangalore Chemicals & Fertilisers. (BS)

❖ HSBC's stake sale in Canara HSBC OBC Life Insurance Company may not happen due to current market situation, according to a senior official from Canara Bank. It may be noted the Rs 60,000 crore Shriram Group, Canada's Manu life and others have shown interest to buy HSBC's stake in the insurance venture (BS)

❖ Kansai Nerolac Paints Ltd reported 3.79% decline in net profit at Rs 60.9 crore for the first quarter ended June 30, 2013, on account of subdued demand. (BS)

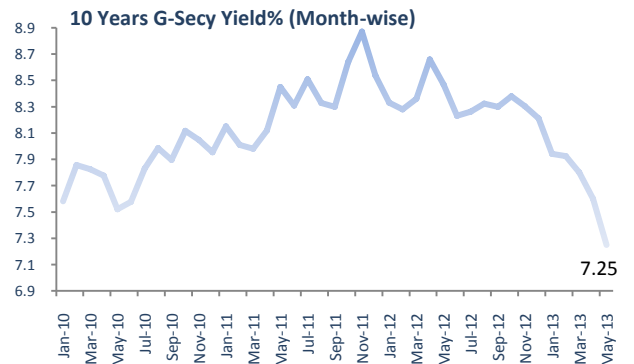
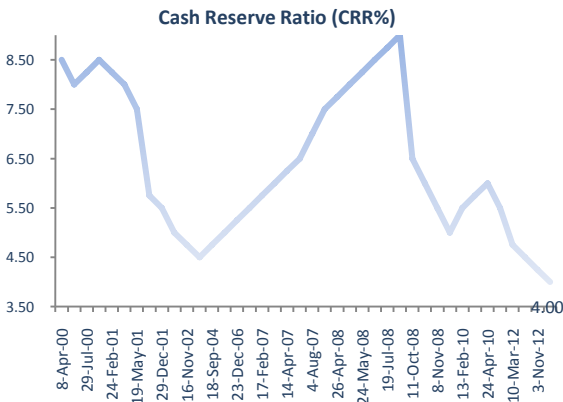
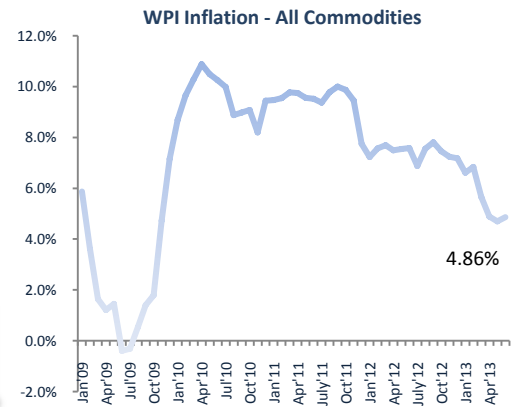
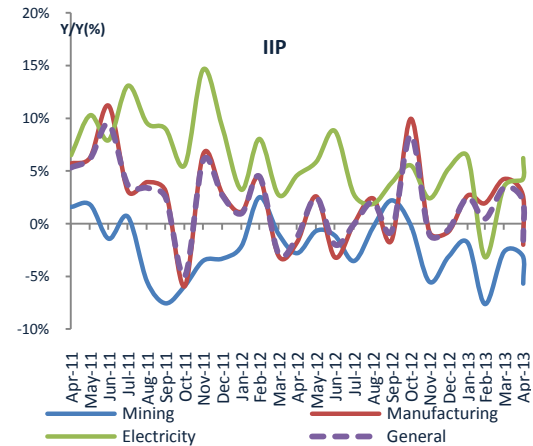
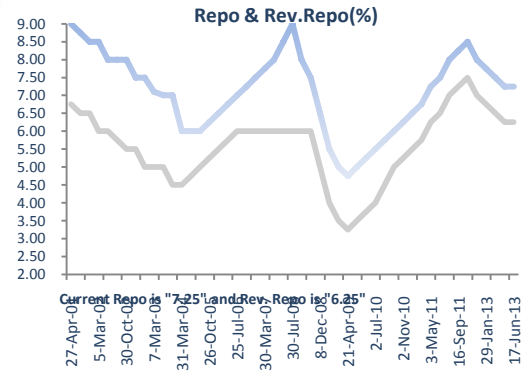
❖ The fifth gram sabha on Niyamgiri bauxite mining project, held at Talberi village in Kalahandi district on Thursday, followed the pattern of the previous four gram sabhas and rejected the proposal outright, asserting socio-cultural and religious rights over the Niyamgiri hill. (BS)

❖ Reliance Jio, the upcoming fourth generation (4G) telecom service provider from Reliance Industries (RIL) may get captive customer of a million subscribers before its commercial launch as it looks for synergy with sister concern Reliance Retail..(BS)

❖ Bata India reported 17.60% rise in net profit to Rs 61.94 crores in Q2 of 2013 over the corresponding period last year. The turnover of the company grew by 13.7% to Rs 572.13 crore in Q2 of 2013, as compared to Rs 503.33 crores for the same period 2012 (BS)

❖ As part of its HorizoNext strategy, auto major Tata Motors launched 'Tata Motors Service', a comprehensive and renewed service programme for achieving deeper customer engagement (BS)

❖ Great Eastern Shipping said it has placed orders with a Japanese company for building two dry bulk carriers.(BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jul-13	Yes Bank Limited	SWISS FINANCE CORPORATION(MAURITIUS) LIMITED	SELL	2450540	377.71
25-Jul-13	Vardhman Textiles Limited	IDFC PREMIER EQUITY FUND	BUY	498396	285
25-Jul-13	Karnataka Bank Limited	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	SELL	1194000	98.36
25-Jul-13	The India Cements Limited	DERIVE INVESTMENTS	BUY	1950000	52.99
25-Jul-13	Punj Lloyd Limited	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	SELL	2616000	28.69

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jul-13	Vardhman Tex	IDFC ASSET MANAGEMENT CO. PVT LTD A/C - IDFC PREMIER EQUITY FUND	B	499881	285.00
25-Jul-13	Aagam Cap	MONO HERBICIDES PVT. LTD.	B	222495	118.97
25-Jul-13	Centenial Surg	VIJAY KALIDAS MAJREKAR	B	165275	33.15
25-Jul-13	Gujarat Auto	DILIP VASANTLAL VARIYA	S	2500	1108
25-Jul-13	Tai Inds-\$	IPRO FUNDS LTD	S	300000	9

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
515030	Asahi India	26-Jul-13	Right13:25	-
500020	Bombay Dyeing	26-Jul-13	Dividend - Rs.1.00	-
500620	Great Eastern Sh	26-Jul-13	Final Dividend - Rs.4.50	-
507960	Gujarat Hotels	26-Jul-13	Dividend - Rs.3.50	-
519552	Heritage Foods	26-Jul-13	BONUS 1:1	29-Jul-13
514043	Himatsingka Seide	26-Jul-13	Dividend - Rs.1.00	-
532835	ICRA	26-Jul-13	Dividend - Rs.22.00	-
506525	Kanoria Chem	26-Jul-13	Dividend - Rs.1.50	-
533519	L&T Finance Holdings	26-Jul-13	Dividend - Rs.0.75	-
505355	NESCO	26-Jul-13	Dividend - Rs.3.50	-
500314	Oriental Hotels	26-Jul-13	Dividend - Rs.0.55	-
532254	Polaris Fin Tec	26-Jul-13	Final Dividend - Rs.5.00	-
503811	Siyaram Silk-\$	26-Jul-13	Dividend - Rs.7.50	-
532221	Sonata Soft	26-Jul-13	Final Dividend - Rs.1.25	-
500400	Tata Power	26-Jul-13	Dividend - Rs.1.15	-
533573	Alembic Pharma	29-Jul-13	Dividend - Rs.2.50	-
506767	Alkyl Amines-\$	29-Jul-13	Dividend - Rs.5.00	-
500031	Bajaj Elect-\$	29-Jul-13	Dividend - Rs.2.00	-
533761	GPT Infra	29-Jul-13	Dividend - Rs.1.00	-
534690	Lakshmi Vilas Bank	29-Jul-13	Dividend - Rs.3.00	-
500257	Lupin	29-Jul-13	Dividend - Rs.4.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
22-Jul-13	USD	Chicago Fed National Activity			-0.3
22-Jul-13	USD	Existing Home Sales		5.20M	5.18M
23-Jul-13	USD	House Price Index (YoY)			7.40%
23-Jul-13	EUR	Consumer Confidence		-18.4	-18.8
23-Jul-13	USD	Richmond Manufacturing Index			8
24-Jul-13	JPY	Trade Balance		-161B	-994B
24-Jul-13	CNY	Chinese HSBC Manufacturing PMI			48.2
24-Jul-13	EUR	Manufacturing PMI		49.1	48.8
24-Jul-13	EUR	Services PMI		48.7	48.3
24-Jul-13	USD	Manufacturing PMI		51.9	51.9
24-Jul-13	USD	New Home Sales		485K	476K
25-Jul-13	GBP	GDP (YoY)		1.30%	0.30%
25-Jul-13	USD	Core Durable Goods Orders (MoM)		0.50%	0.50%
25-Jul-13	USD	Initial Jobless Claims		339K	334K
25-Jul-13	USD	Continuing Claims			3114K
26-Jul-13	JPY	Tokyo Core CPI (YoY)		0.30%	0.20%
26-Jul-13	USD	Michigan Consumer Sentiment			83.9

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
26-Jul-13	INR	Indian Bank Loan Growth			13.70%

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