

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7493	(1.00)	CNX IT	9579	(0.09)
Sensex	25063	(0.99)	BANK NIFTY	15050	(1.23)
DowJones	16846	(0.13)	S&P CNX 500	6066	(0.81)
Nasdaq	4379	(0.02)	CNX FMCG	17198	(0.36)
Hangseng	23212	0.06	CNX REALTY	3771	(1.32)
Shanghai	2031	(0.36)	CNX AUTO	6796	0.07
Nikkei	15222	(0.56)	CNX ENERGY	9774	(3.36)
Strait Times	3271	(0.23)	CNX PHARMA	8136	0.38
Kospi	1992	(0.18)	Advances / Declines	BSE	NSE
Taiwan	9313	(0.08)	Advances	1465	673
FTSE	6735	0.02	Declines	1567	854
CAC	4440	(0.47)	Unchanged	97	49
DAX	9805	(0.64)	Total	3129	1576

Nifty Gainers		
Company	Price(Rs)	Chg(%)
WIPRO	538.10	1.69
TECHM	2049.00	1.53
LT	1670.00	1.21
HCLTECH	1435.00	1.13
DRREDDY	2506.00	1.12

Nifty Losers		
Company	Price(Rs)	Chg(%)
ONGC	413.80	(5.28)
DLF	210.00	(3.31)
RELIANCE	1017.75	(3.16)
NTPC	152.70	(2.65)
MCDOWELL-N	2576.00	(2.51)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Polyplex Corp	4.40	0.5	9
Steel Strp Whls-\$	2.36	0.3	9
Container Corp	1.36	0.2	6
IPCA Lab	0.81	0.2	5
Cadila Health	1.08	0.2	5

Indian Forex	Closing	Chg	% Chg
USD/INR	60.162	(0.117)	(0.19)
GBP/INR	102.233	(0.048)	(0.05)
EUR/INR	82.044	(0.004)	(0.00)
JPY/INR	59.120	(0.030)	(0.05)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28100	(50)
Silver (Rs/1kg)	44320	56

Commodities	Price	% Chg.
Crude (US\$/BBL)	105.7	(0.92)
Brent (US\$/BBL)	113.1	(0.76)
Gold (US/oz)	1317.9	(0.08)
Silver (US\$/oz)	21.1	0.52
Copper (US\$/MT)	6936.5	0.67
Alum (US\$/MT)	1857.0	(0.51)
Zinc(US\$/MT)	2180.0	0.48

ADR	Cl. Values	% Chg.
ICICI Bank	48.65	(0.32)
HDFC Bank	46.23	0.44
Infosys	52.65	(0.68)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	41.75	0.78
Wipro	11.46	(0.02)
Tata Motors	39.14	(0.24)

Market Sensor

US stocks ended slightly lower on Thursday after the president of the Federal Reserve Bank of St. Louis said interest-rate increases should come sooner rather than later. The Dow Jones industrial average fell 21.38 points or 0.13 %, to end at 16,846.13. The S&P 500 slipped 2.31 points or 0.12 %, to 1,957.22. The Nasdaq Composite dipped 0.71 of a point or 0.02 %, to 4,379.05.

Indian stocks posted biggest drop in six days on Thursday, triggered by the drop in Oil & Gas stocks after the Cabinet Committee on Economic Affairs (CCEA) on Wednesday, 25 June 2014, deferred a decision on revision of natural gas pricing by three months. The S&P BSE Sensex shed 251.07 points or 0.99% to settle at 25,062.67, its lowest closing level since 23 June 2014 while CNX Nifty lost 76.05 points or 1% to settle at 7,493.20, its lowest closing level since 5 June 2014. On Thursday's trading session, FII sold net Rs. 601.89 Cr in cash market whereas, DII bought net Rs. 170.92 Cr in cash segment.

Coming to today's trade, Indian markets are expected to open flat following muted trend seen in other Asian markets. The index may dip lower but should be able to find support around 7460 levels and bounce back to reclaim 7500 levels.

Global News

❖ Japan's consumer prices climbed at the fastest pace in 32 years, boosted by a sales-tax increase and higher utility charges that are squeezing household budgets as wage gains remain limited. (Bloomberg)

❖ Consumer spending grew less than forecast in May, putting a damper on the strength of the projected rebound in U.S. economic growth this quarter. Purchases, which account for about 70 percent of the economy, climbed 0.2 percent last month. (Bloomberg)

❖ Czech policy makers kept their koruna ceiling in place for a fifth meeting and said they won't scrap the limit on the currency's gains before the second quarter of 2015 due to slower inflation (CZCPOY) at home and abroad. (Bloomberg)

❖ Consumer confidence last week held near its 2014 high as views on the U.S. economy were the second-strongest since 2008. The Bloomberg Consumer Comfort Index stood at 37.1 in the period ended June 22. (Bloomberg)

Economic News

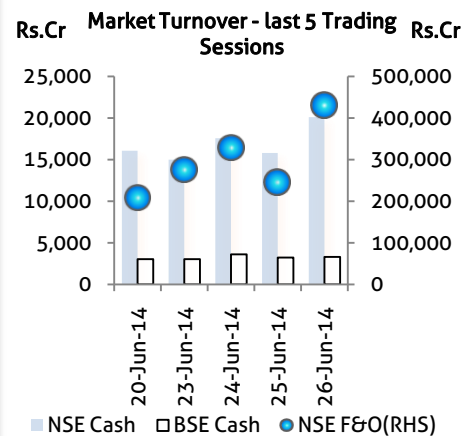
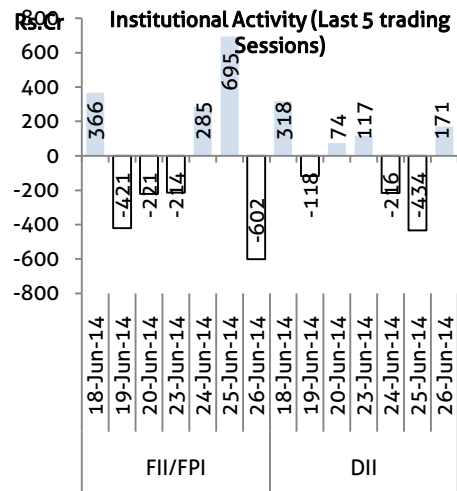
- ❖ Taking a dig at the Congress-led United Progressive Alliance Rahul Bajaj, chairman of Bajaj Auto said that India's corporate sector suffered under their five year term with entrepreneurs losing their 'animal spirit'. (BS)
- ❖ Seeking to allay concerns of foreign companies with regard to the new Companies Act, the government has said there would be no compulsion for them to register an Indian subsidiary only as a public company. (BS)
- ❖ The government will come out with a policy to facilitate the transfer of coal linkages from old retiring power plants of public sector utilities to new units. (BS)
- ❖ The delay in onset of monsoon over the Gujarat, the state government machinery has swung into action and come out with a contingency plan for kharif crop and begun coordination meeting with district administration to take stock of the water, fodder and other local requirements. (BS)
- ❖ Stating agriculture has the potential to take India's growth to 8% and create millions of jobs in rural areas, ASSOCHAM has suggested a slew of measures to the Government in this regard. (BS)
- ❖ The Centre is working towards providing good quality electricity at affordable tariff to Andhra Pradesh in the next one year and help the southern state initiate power reforms. (BS)
- ❖ The government imposed a minimum export price (MEP) of \$450 per tonne on potatoes to augment domestic supply of the vegetable, which saw surge in prices recently. (BS)
- ❖ Promising a liberal regime for the newly-implemented Corporate Social Responsibility law, the government has allowed the companies to include housing for Economically Weaker Sections (EWS) under their CSR programmes. (BS)
- ❖ The Labour Ministry has approved a new liberal inspection scheme aimed at simplifying "business regulations" and bringing "transparency and accountability" in the system. (BS)
- ❖ Union Home Minister Rajnath Singh and Agriculture Minister Radha Mohan Singh arrived at 7 Race Course Road to discuss inflation with Prime Minister Narendra Modi. (BS)
- ❖ The much-awaited Mandi House to Central Secretariat Metro section was thrown open to the public by Union Urban Development Minister Venkaiah Naidu. (BS)

Domestic News

- ❖ The date of verdict in the erstwhile Satyam Computer Services accounting fraud case would be pronounced on July 28. The trial in the five-and-a-half year case, touted to be the biggest corporate fraud in the country, has been completed last week. (BS)
- ❖ Sirens, the mass-alarm system of yesteryears, are history. However, for workers of 58 jute mills in West Bengal, sirens are still of utmost significance. Every morning, a 9 am siren denotes the nearby jute mill is up and running, the gates open. (BS)
- ❖ Large and medium-sized fleet owners of trucks are heading back to showrooms, kick starting negotiations with dealers for purchases ending a two year hiatus, according to commercial vehicle manufacturers. (BS)
- ❖ India's third largest information technology (IT) services company, Wipro, said its independent directors BC Prabhakar and Shyam Saran have conveyed their intentions to not seek a re-election to the board in order to pursue other personal and professional interests. (BS)

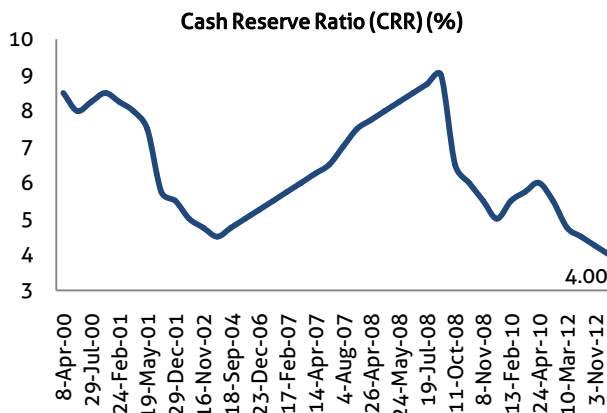
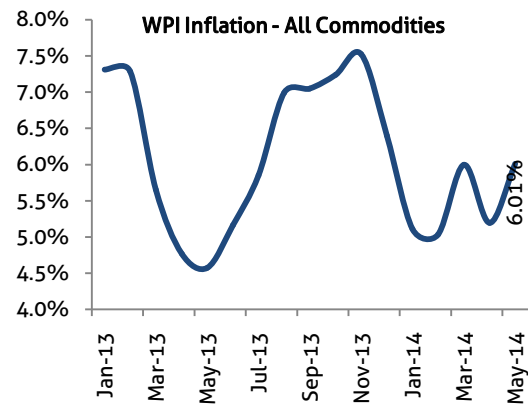
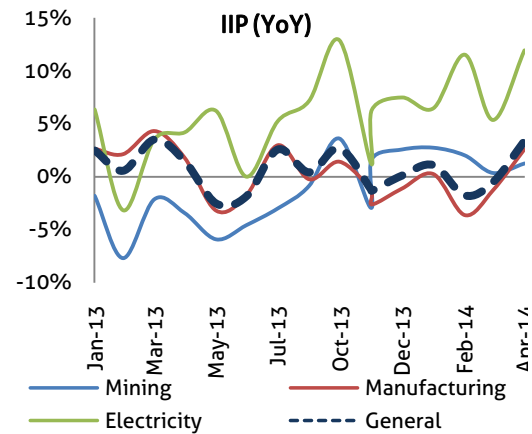
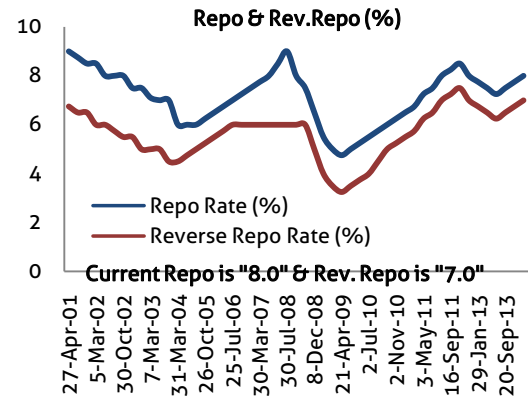
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3619	0.0007	0.05
GBP-USD	1.7038	0.0011	0.06
USD-JPY	101.51	(0.22)	(0.22)

Bond Markets	Closing	Chg
10-yr bond	8.75	0.5 bps
Interbank call	8.92	-5.0 bps



Domestic News (Cont...)

- ❖ India Cements to invest around Rs 75 crore to upgrade its Shankar Nagar facility in Tamil Nadu. The proposed investment will not increase the production, but also the quality of cement and will reduce the power cost. (BS)
- ❖ IT services major Cognizant said it has secured a 7-year contract from Danish firm ISS to provide Finance & Accounting (F&A) business process services in the Nordic region. (BS)
- ❖ Amid fuel supply issues, state-owned Coal India (CIL) has so far signed fuel supply pacts with power plants for a capacity of only 73,075 MW. (BS)
- ❖ A special court trying the case of multi-crore rupee accounting fraud in erstwhile Satyam Computer Services Limited (SCSL) said it will pronounce the date of verdict on July 28. (BS)
- ❖ The Supreme Court will hear a PIL on July 1 seeking directions to the government to discharge its statutory obligation by recovering Rs.20,000 crore tax dues from telecom giant Vodafone. (BS)
- ❖ Public sector general insurer New India Assurance presented a dividend cheque of Rs 220 crore to the government. (BS)
- ❖ Star CJ Alive, the home shopping channel, will be expanding its operations in the country and hopes to achieve monthly break-even this financial year. (BS)
- ❖ State-run power trader Gridco Ltd posted Rs 48.25 crore net profit in 2013-14 financial year, up by 51% from previous year profit as higher revenue from inter-state power trade and better availability of cheaper hydro power supported, officials said. (BS)
- ❖ Indian e-commerce segment has seen \$ 1.3 billion foreign investment between January 2010 and June 2013. Also, the number of deals in India in this category was the highest in Asia, said a new study. (BS)
- ❖ Domestic airlines are expected to post \$ 1.3 to 1.4 billion loss (about Rs 7800-8400 crore) in FY 2015 as operating environment remains tough and demand sluggish, according to Centre for Asia Pacific Aviation. (BS)
- ❖ The Department of Telecommunications (DoT) is at the final stage of issuing demand notices to telecom companies, whose licences were quashed by the Supreme Court in February, 2012. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Jun-14	SKS Microfinance Ltd	QUINTESSENCE MAURITIUS WEST FUND	BUY	1500000	278.0
26-Jun-14	Century Textiles Ltd.	DERIVE INVESTMENTS	BUY	720000	569.3
26-Jun-14	Arvind Limited	GLOBE CAPITAL MARKET LIMITED	BUY	1502535	232.4
26-Jun-14	Arvind Limited	MORGAN STANLEY ASIA SINGAPORE PTE	SELL	1436000	233.4
26-Jun-14	SKS Microfinance Ltd	WESTBRIDGE VENTURES II LLC	SELL	1173492	278.0

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Jun-14	ACE Edutrend	LILAC FARMS PRIVATE LIMITED	S	206,392	40.1
26-Jun-14	Bhandari Hos	VALUE PLUS SHARES N SECURITIES PRIVATE LIMITED	S	184,568	42.7
26-Jun-14	ACE Edutrend	SHREE MAHAGANGA SUGAR MILLS LIMITED	P	175,028	40.2
26-Jun-14	IFL Promoters	ADVANCE INDIA SHARES AND SECURITIES PRIVATE LTD	P	510,000	5.7
26-Jun-14	AURUM SOFT	PALAT YADAV	S	450,560	6.2

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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	Final Dividend - Rs.3.00	-
531209	Nucleus Soft	27-Jun-14	Special 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	-
505807	Rolcon Engr	02-Jul-14	Dividend - Rs.1.50	-
506863	Swadeshi Inds	02-Jul-14	Stock Split from Rs.10/- to Re.1/-	03-Jul-14
532977	Bajaj Auto	03-Jul-14	Dividend - Rs.50.00	-
532978	Bajaj Finserv	03-Jul-14	Dividend - Rs.1.75	-
500490	Bajaj Holdings	03-Jul-14	Dividend - Rs.30.00	-
500034	BAJFINANCE	03-Jul-14	Dividend - Rs.16.00	-
532483	Canara Bank	03-Jul-14	Final Dividend - Rs.4.50	-

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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