

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 5882 | 0.14 | CNX IT | 8158 | (0.36) |
| Sensex | 19894 | 0.19 | BANK NIFTY | 10098 | 0.16 |
| DowJones | 15328 | 0.36 | S&P CNX 500 | 4482 | 0.12 |
| Nasdaq | 3787 | 0.70 | CNX FMCG | 17834 | 0.61 |
| Hangseng | 23134 | 0.04 | CNX REALTY | 156 | (0.70) |
| Shanghai | 2158 | 0.09 | CNX AUTO | 4767 | (0.05) |
| Nikkei | 14758 | (0.28) | CNX ENERGY | 7637 | (0.87) |
| Strait Times | 3215 | 0.64 | CNX PHARMA | 7363 | 0.86 |
| Kospi | 2012 | 0.25 | Advances / Declines | BSE | NSE |
| Taiwan | 8209 | 0.29 | Advances | 1177 | 610 |
| FTSE | 6566 | 0.21 | Declines | 1136 | 533 |
| CAC | 4187 | (0.21) | Unchanged | 150 | 82 |
| DAX | 8664 | (0.02) | Total | 2463 | 1225 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| BHEL | 151.15 | 5.59 |
| TATASTEEL | 301.30 | 3.50 |
| JPASSOCIAT | 38.60 | 3.35 |
| COALINDIA | 303.45 | 2.85 |
| SUNPHARMA | 582.00 | 2.28 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| JINDALSTEL | 237.00 | (3.27) |
| AMBUJACEM | 184.00 | (2.59) |
| PNB | 474.10 | (2.22) |
| GAIL | 328.00 | (1.94) |
| RELINFRA | 401.50 | (1.62) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|------------------|-----------------|------------------|------------------|
| Godrej Cons | 3.10 | 0.35 | 8.91 |
| Gillette India | 0.25 | 0.03 | 8.57 |
| Great Eastern Sh | 4.26 | 0.62 | 6.89 |
| ABG Shipyard | 6.08 | 1.13 | 5.39 |
| Shipping Corp | 13.40 | 2.63 | 5.09 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|---------|--------|
| USD/INR | 62.226 | (0.472) | (0.75) |
| GBP/INR | 100.059 | (0.214) | (0.21) |
| EUR/INR | 84.107 | (0.352) | (0.42) |
| JPY/INR | 62.840 | (0.730) | (1.15) |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 30090 | 90 |
| Silver (Rs/1kg) | 49092 | 127 |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 102.7 | 0.36 |
| Brent (US\$/BBL) | 109.0 | 0.81 |
| Gold (US/oz) | 1323.8 | (0.62) |
| Silver (US\$/oz) | 21.6 | (0.83) |
| Copper (US\$/MT) | 7220.5 | 0.92 |
| Alum (US\$/MT) | 1761.5 | 0.54 |
| Zinc(US\$/MT) | 1860.5 | 1.03 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 31.67 | 0.41 |
| HDFC Bank | 31.79 | 0.27 |
| Infosys | 48.72 | (0.15) |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 38.60 | 0.04 |
| Wipro | 10.63 | 0.27 |
| Tata Motors | 27.59 | 0.05 |

Market Sensor

U.S market closed modestly higher in choppy trading Thursday, with major averages avoiding a six-day losing streak, as investors digested the latest batch of economic news and developments in Washington. Dow Jones Industrial Average was up 0.36% or 55.04 points at 15328.30. Nasdaq Composite was up 0.70% or 26.33 points at 3787.43. Standard & Poor's 500 was up 0.35% or 5.90 points at 1698.67.

Indian market remained highly volatile ending the previous trading session with marginal gains. Nifty ended the previous trading session with a gain of 0.14% or 8.40 points at 5882.25. On Friday's trading session, FII's bought net Rs.172.15 Cr in cash market and bought net Rs 838.66 in derivative segment. Whereas, DII sold net Rs.362.11 Cr in cash segment.

Coming to today's trade Nifty may remain volatile with crucial support seen at 5850, breach of which might drag the Index further lower.

Global News

❖ Japan's inflation accelerated to the fastest pace since 2008 in August on higher energy costs, underscoring pressure on Prime Minister Shinzo Abe to drive wage increases as he seeks to end 15 years of deflation. (Bloomberg)

❖ Americans unexpectedly filed fewer claims for unemployment benefits last week, highlighting labor- market gains that are shoring up consumer confidence. (Bloomberg)

❖ A slide below zero in rates on some Treasury bills that mature beyond October shows investors have little angst lawmakers may fail to agree on a debt limit. (Bloomberg)

❖ Fewer Americans signed contracts in August to buy previously owned homes, a sign that rising mortgage rates may have slowed housing market momentum. (Bloomberg)

❖ U.K. economic growth accelerated in the second quarter as higher consumer spending helped to blunt the impact of a drop in business investment. (Bloomberg)

❖ China said it will allow trading of certificates of deposit between banks, another step toward loosening state control over interest rates. (Bloomberg)

Economic News

❖ The risk of a sovereign downgrade risk has only become exacerbated after international rating agency Moody's downgraded State Bank of India's senior debt and local currency deposit to 'Baa3', and now has a negative outlook. (BS)

❖ A high-powered committee constituted by the government under the chairmanship of former Chief Economic Advisor Raghuran Rajan to identify new backward states has found Bihar, Assam, Arunachal Pradesh, Chhattisgarh, Jharkhand, Madhya Pradesh, Meghalaya, Odisha, Rajasthan and Uttar Pradesh as being the least developed, an official statement said. However, it is not clear whether these states would be categorised as special category as being demanded by Bihar. (BS)

❖ The government has extended by one month the time given to a panel headed by Kirit S Parikh to suggest a methodology for pricing of diesel and cooking fuel. (BS)

❖ India has for long been caught in the diplomatic crossfire between the United States and Iran, so 's meeting between US Secretary of State John Kerry and his Iranian counterpart, on the sidelines of the UN General Assembly in New York, is being keenly watched for signs of a potential thaw between the two adversaries. This is one of the highest level diplomatic initiatives between Iran and the US in a 34 year standoff that began after the revolution of 1979. (BS)

❖ The Centre expects cooperation from the state governments to slash the surcharge and taxation on aviation fuel to control its prices, a senior Civil Aviation Ministry official said here. (BS)

❖ Amidst talk of Reliance Industries being denied a higher price for gas due to output from KG-D6 not matching targets, Oil Minister M Veerappa Moily said the new gas pricing policy would apply uniformly to all. (BS)

❖ All eyes are on rural India, even as urban India combats a slowdown. Both consumption and savings are on the wane as inflation burns a hole into pockets. (BS)

❖ Emphasising there was need for a stronger biometric authentication mechanism, Rajya Sabha MP Rajeev Chandrasekhar said cost for addition of infrastructure for this should not be passed on to bank customers. (BS)

Domestic News

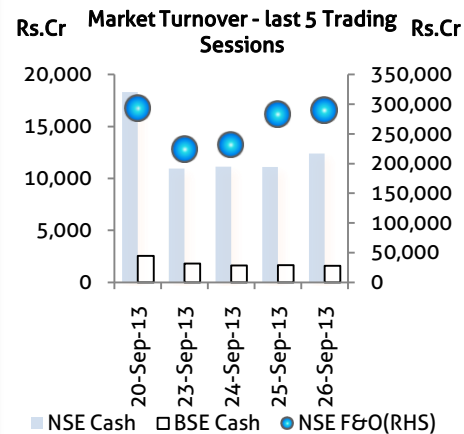
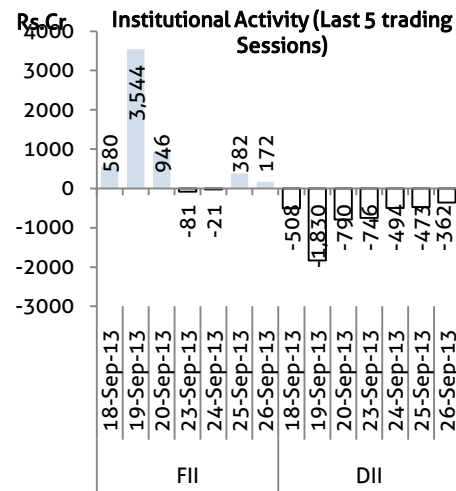
❖ Maruti Suzuki India, the country's largest car maker, on Wednesday said it would increase the prices of its entire range of models by up to Rs 10,000 from October first week, mainly due to the depreciation of the rupee against the dollar. "We have been wanting to raise the price for some time, as our input costs went up severely, mainly on account of the weakening of the rupee. However, the market was not conducive (to an increase). Now, it has become inevitable," Chief Operating Officer (Marketing and Sales) Mayank Pareek said. (.BS)

❖ ONGC Videsh Ltd (OVL), the foreign arm of India's state-run Oil and Natural Gas Corp, is in talks with PetroVietnam to rope in the Vietnamese oil and gas company as a strategic partner in a block it owns in the Southeast Asian nation. This comes at a time when the company is looking to raise \$4 billion (Rs 24,950 crore) through bonds and loans in the international market to fund its recent acquisitions in Mozambique. (BS)

❖ The Reserve Bank of India (RBI) on Wednesday came down heavily on retailers offering interest-free schemes for purchase of consumer goods, a move intended to protect customers but could dampen the festive spirit. The central bank has also said that no additional charges can be levied on payment through debit cards. (BS)

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.3481 | (0.0080) | (0.06) |
| GBP-USD | 1.6039 | (0.0002) | (0.01) |
| USD-JPY | 98.75 | (0.24) | (0.24) |

| Bond Markets | Closing | Chg |
|----------------|---------|-----------|
| 10-yr bond | 9.18 | -8.8 bps |
| Interbank call | 9.46 | -2.0s bps |



Domestic News (Cont...)

❖ Ahead of Prime Minister Manmohan Singh's meeting with American President Barack Obama, a consortium of influential American information technology (IT) and telecom industry bodies has sought intervention against what they claim are 'restrictive' Indian policies. (BS)

❖ IndiGo will induct 20 Airbus A321neo planes, a larger variant of A320, as India becomes a battleground for existing airlines and new players. In 2011, the Gurgaon-based airline placed an order of 180 narrow-body Airbus aircraft, including 150 fuel efficient A320neo and 30 A320s. The deal allows the airline to opt for the bigger A321 planes over the A320s and it is exercising the choice now. (BS)

❖ A day after Vijay Mallya ruled out selling his controlling stake in Mangalore Chemicals and Fertilizers (MCF) to Deepak Fertilisers or Zuari, the latter's promoter, Saroj Poddar, said he'd sell his 16 per cent stake to the highest bidder. (BS)

❖ Some minority shareholders in Tata Metaliks are opposed to the proposal of merging it with Tata Steel. At the Tata Metaliks' annual general meeting on Wednesday in Kolkata, Sanjay Budhia, promoter of the Patton group, objected to the proposal. (BS)

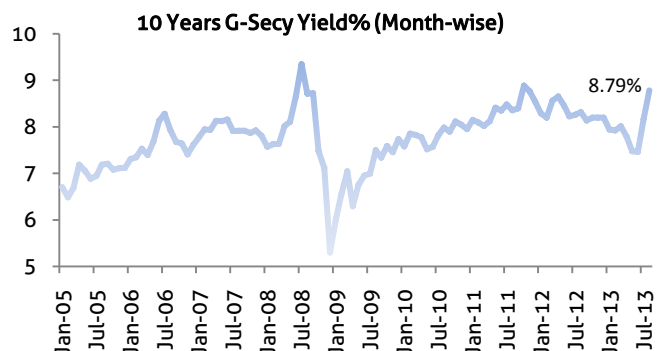
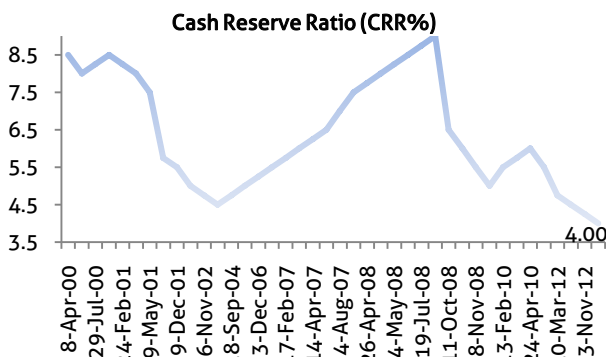
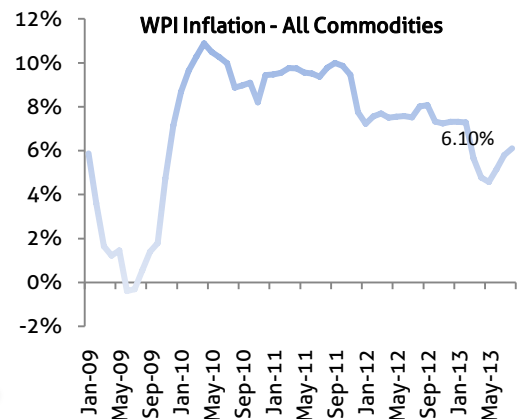
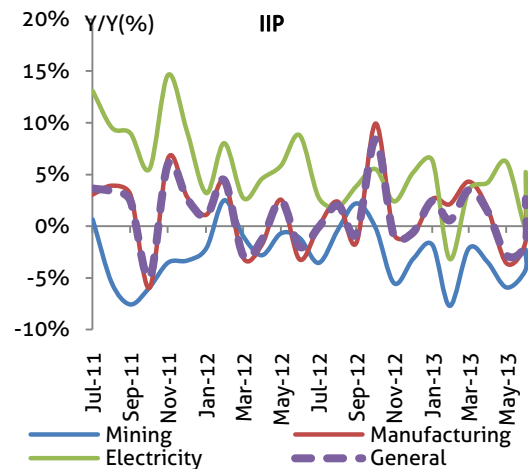
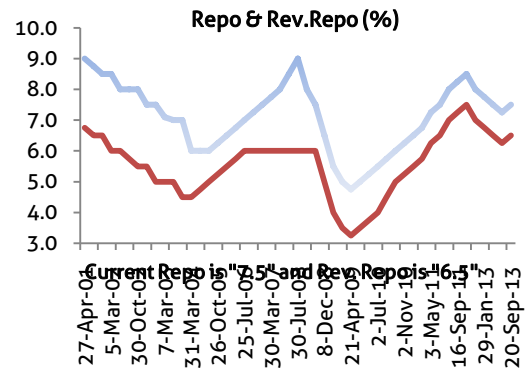
❖ A good monsoon and an election year ahead will help retailers tide over the economic slowdown, believes Kishore Biyani, founder of the Future Group. (BS)

❖ UB Group Chairman Vijay Mallya said UB Holdings intends to pay Kingfisher Airlines, employees a month's salary, but the plan might be difficult to execute. Creditors fighting hard for dues of about Rs 600 crore from UB Holdings have objected to the plan. A bench of the Karnataka high court comprising judges D Bhosle and L Manoharan adjourned the hearing of the case to Monday. (BS)

❖ Targeting the festive season, Fiat Group Automobiles India Private Limited (FGA IPL) today forayed into the entry level sedan segment by launching classic version of its Linea sedan, priced at Rs 5.99 lakh (ex-showroom New Delhi). (BS)

❖ The civil aviation ministry has decided to allow airlines to charge a transaction fee but has insisted the amount be part of the airfare and not outside it (BS)

❖ The number of super-rich or high net worth individuals (HNIs) in the Asia-Pacific is growing faster than the rest of the world, shows the Asia-Pacific Wealth Report 2013 by RBC Wealth Management and its partner Capgemini. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|--------------------------|---|----------|-------------|--------|
| 26-Sep-13 | ABG Shipyard Limited | ICICI PRUDENTIAL LIFE INSURANCE COMPANY LTD | SELL | 291304 | 271.01 |
| 26-Sep-13 | Adhunik Metaliks Limited | LINKSTAR MARKETING PRIVATE LIMITED | BUY | 2396741 | 28.75 |
| 26-Sep-13 | Adhunik Metaliks Limited | SHYAM VATIKA ADVISORS LLP | SELL | 2136741 | 28.75 |
| 26-Sep-13 | Tata Elxsi Limited | JIGAR TRADING CO (" JIGAR LALCHAND SHAH ") | BUY | 225954 | 188.36 |
| 26-Sep-13 | First Leasing Company | SANGEETA ARORA | BUY | 230000 | 16.76 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|---|----------|-------------|-------|
| 26-Sep-13 | ABG Shipyard | ICICI PRUDENTIAL LIFE INSURANCE COMPANY LTD | S | 291,304 | 271 |
| 26-Sep-13 | TCI Inds | VIKAS AGARWAL | B | 20,040 | 820 |
| 26-Sep-13 | VKJINFRA | VISHVAS PROJECTS LIMITED | S | 306,000 | 22.85 |
| 26-Sep-13 | Olympic Cards | NITESH RATANCHAND LODHA | S | 212,869 | 31.47 |
| 26-Sep-13 | Bharati Ship | GAJANAN ENTERPRISES | B | 212,124 | 30.62 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|--------------------|-----------|-------------------------------------|-------------|
| 531147 | ALICON | 25-Sep-13 | Dividend - Rs.2.00 | - |
| 532342 | COMMECH TECH | 25-Sep-13 | Final Dividend - Rs.0.14 | - |
| 530393 | DB Intl Stock | 25-Sep-13 | Dividend - Rs.0.30 | - |
| 507789 | Jagsonpal Phar | 25-Sep-13 | Dividend - Rs.0.50 | - |
| 522249 | Mayur Uniquoter-\$ | 25-Sep-13 | Stock Split from Rs. 10/- to Rs.5/- | 26-Sep-13 |
| 533080 | MOLDTKPACK | 25-Sep-13 | Final Dividend - Rs.1.50 | - |
| 511644 | Omega Interact | 25-Sep-13 | Consolidation of Shares | - |
| 511644 | Omega Interact | 25-Sep-13 | Reduction of Capital | - |
| 503657 | Veer Energy | 25-Sep-13 | Dividend - Rs.0.06 | - |
| 505232 | VELJAN | 25-Sep-13 | Dividend - Rs.7.50 | - |
| 519105 | AVT Nat Products | 26-Sep-13 | BONUS 1:1 | - |
| 522163 | DIAMONPOWER-\$ | 26-Sep-13 | Dividend - Rs.1.00 | - |
| 524808 | Phyto Chem | 26-Sep-13 | Dividend - Rs.1.00 | - |
| 518053 | Sri Chakra Cem | 26-Sep-13 | Reduction of Capital | 28-Sep-13 |
| 506235 | Alembic | 27-Sep-13 | BONUS 1:1 | 30-Sep-13 |
| 530967 | ARICENTINF | 30-Sep-13 | Stock Split from Rs. 10/- to Rs.5/- | 01-Oct-13 |
| 533276 | BS Ltd | 30-Sep-13 | BONUS 1:1 | 01-Oct-13 |
| 534734 | ICVL Chem | 30-Sep-13 | Stock Split from Rs.10/- to Re.1/- | 01-Oct-13 |
| 534733 | ICVL Steels | 30-Sep-13 | Stock Split Rs.10/- to Re.1/- | 01-Oct-13 |
| 534732 | Intellivate Cap | 30-Sep-13 | Stock Split from Rs. 10/- to Re.1/- | 01-Oct-13 |
| 503637 | Dhanleela Inv | 10-Oct-13 | Stock Split from Rs. 10/- to Rs.2/- | 12-Oct-13 |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|--------------------------------|--------|----------|----------|
| 23-Sep-13 | CNY | Chinese HSBC Manufacturing PMI | | 50.9 | 50.1 |
| 23-Sep-13 | EUR | Manufacturing PMI | | 51.8 | 51.4 |
| 23-Sep-13 | USD | Chicago Fed National Activity | | | -0.15 |
| 23-Sep-13 | USD | Manufacturing PMI | | 54 | 53.1 |
| 24-Sep-13 | USD | House Price Index (MoM) | | | 0.70% |
| 24-Sep-13 | USD | CB Consumer Confidence | | 79.8 | 81.5 |
| 24-Sep-13 | USD | Richmond Manufacturing Index | | | 14 |
| 25-Sep-13 | GBP | CBI Distributive Trades Survey | | 24 | 27 |
| 25-Sep-13 | USD | Durable Goods Orders (MoM) | | 0.20% | -7.40% |
| 25-Sep-13 | USD | New Home Sales | | 420K | 394K |
| 26-Sep-13 | EUR | M3 Money Supply (YoY) | | 2.20% | 2.20% |
| 26-Sep-13 | GBP | Current Account | | -12.0B | -14.5B |
| 26-Sep-13 | GBP | GDP (YoY) | | 1.50% | 1.50% |
| 26-Sep-13 | USD | GDP (QoQ) | | 2.60% | 2.50% |
| 26-Sep-13 | USD | Initial Jobless Claims | | 325K | 309K |
| 26-Sep-13 | USD | Pending Home Sales (MoM) | | -0.70% | -1.30% |
| 26-Sep-13 | USD | KC Fed Manufacturing | | | 8 |
| 26-Sep-13 | GBP | GfK Consumer Confidence | | -11 | -13 |
| 27-Sep-13 | JPY | Tokyo CPI (YoY) | | | 0.50% |
| 27-Sep-13 | GBP | Nationwide HPI (MoM) | | 0.50% | 0.60% |
| 27-Sep-13 | EUR | Business and Consumer Survey | | 96 | 95.2 |
| 27-Sep-13 | EUR | Consumer Confidence | | -15 | -15.6 |
| 27-Sep-13 | USD | Core PCE Price Index (MoM) | | 0.10% | 0.10% |
| 27-Sep-13 | USD | Personal Spending (MoM) | | 0.30% | 0.10% |
| 27-Sep-13 | USD | Michigan Consumer Sentiment | | 78 | 76.8 |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|---------------------------|--------|----------|----------|
| 27-Sep-13 | INR | Indian Foreign Debt (USD) | | | 390.00B |

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