

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6239	0.62	CNX IT	10201	0.37
Sensex	20987	0.65	BANK NIFTY	10730	0.60
DowJones	16273	0.46	S&P CNX 500	4816	0.47
Nasdaq	4319	0.63	CNX FMCG	16868	1.07
Hangseng	22941	0.50	CNX REALTY	154	(0.39)
Shanghai	2047	(0.04)	CNX AUTO	5396	0.94
Nikkei	14924	0.01	CNX ENERGY	7452	0.20
Strait Times	3101	0.13	CNX PHARMA	8085	1.04
Kospi	1979	0.02	Advances / Declines	BSE	NSE
Taiwan	8640	0.45	Advances	1322	688
FTSE	6810	0.16	Declines	1369	739
CAC	4396	(0.01)	Unchanged	150	82
DAX	9588	(0.76)	Total	2841	1509

Nifty Gainers		
Company	Price(Rs)	Chg(%)
GAIL	369.65	3.63
M&M	965.20	2.26
GRASIM	2580.00	2.08
ITC	328.40	2.00
SUNPHARMA	630.65	1.87

Nifty Losers		
Company	Price(Rs)	Chg(%)
NMDC	126.85	(3.61)
TATASTEEL	349.20	(3.15)
SSLT	175.45	(2.23)
TATAPOWER	79.30	(2.04)
INDUSINDBK	397.00	(1.40)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Shriram City Uni	1.40	0.00	1972
MAHINDCIE	10.48	0.37	29
PI Inds	3.88	0.16	24
Polaris Fin Tec	44.48	2.10	21
Clariant Chem	0.86	0.08	10

Indian Forex	Closing	Chg	% Chg
USD/INR	61.938	(0.038)	(0.06)
GBP/INR	103.313	0.004	0.00
EUR/INR	85.115	(0.029)	(0.03)
JPY/INR	60.530	0.020	0.03

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30500	(125)
Silver (Rs/1kg)	47805	160

Commodities	Price	% Chg.
Crude (US\$/BBL)	102.1	(0.44)
Brent (US\$/BBL)	108.9	(0.10)
Gold (US/oz)	1331.7	(0.07)
Silver (US\$/oz)	21.3	(0.88)
Copper (US\$/MT)	7095.0	(0.76)
Alum (US\$/MT)	1716.0	(1.10)
Zinc(US\$/MT)	2072.0	(0.24)

ADR	Cl. Values	% Chg.
ICICI Bank	35.25	0.57
HDFC Bank	33.61	(0.03)
Infosys	61.67	0.47
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	47.62	0.22
Wipro	14.18	0.00
Tata Motors	35.05	1.23

Market Sensor

US market climbed on Thursday, propelling the S&P 500 to a record close, after Federal Reserve Chair Janet Yellen said the central bank would probably continue tapering its asset purchases while tracking data to figure how much recent softness in the economy is due to the weather. Dow Jones Industrial Average was up 0.46% or 74.24 points at 16272.65. Nasdaq Composite was up 0.63% or 26.87 points at 4318.93. Standard & Poor's 500 was up 0.49% or 9.13 points at 1854.29.

Indian equity market closed the February clearing session on a higher note coupled with high volatility due to F&O expiry. Nifty ended the previous trading session with a gain of 0.62% or 38.75 points at 6238.80. On Wednesday's trading session, FII's bought net Rs.511.15 Cr in cash market and bought net Rs.1914.37 in derivative segment. Whereas, DII sold net Rs.251.91 Cr in cash segment.

Coming to today's trade Nifty to remain volatile with positive bias, crucial intraday support exists at 6190 followed by 6160 while resistance is seen at 6265 followed by 6310

Global News

❖ Japan's industrial production grew the most since 2011, indicating the economy is strengthening as a looming sales-tax bump stimulates demand, while inflation matched the highest level in more than five years. (Bloomberg)

❖ Federal Reserve Chair Janet Yellen said the central bank is likely to keep trimming asset purchases, even as policy makers monitor data to determine if recent weakness in the economy is temporary. (Bloomberg)

❖ The drought parching Singapore and swaths of Malaysia and Indonesia threatens to raise food prices, slow economic growth and disrupt water supply in the region, home to the world's oldest tropical rainforests. (Bloomberg)

❖ Federal Reserve Chair Janet Yellen said the central bank is likely to keep trimming asset purchases, even as policy makers monitor data to determine if recent weakness in the economy is temporary. (Bloomberg)

Economic News

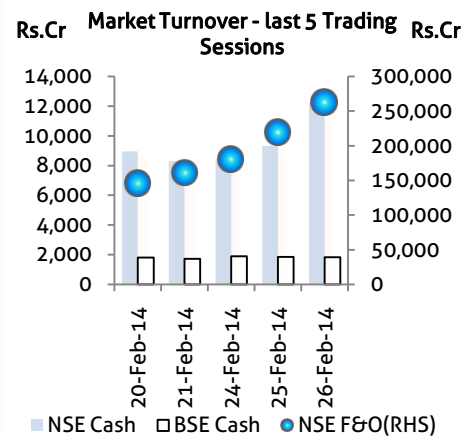
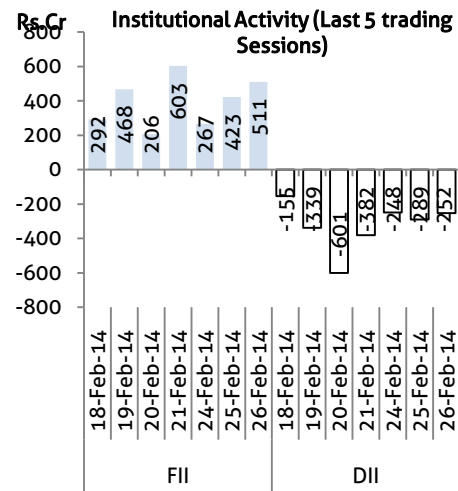
- ❖ The Ministry of Mines on Wednesday requested the Finance Ministry to scrap 5% export duty imposed on iron ore pellets stating that the move would not just hamper the pellet industry but would also affect other dependent segments like ports and railways. (BS)
- ❖ In 2012-13, India's burgeoning coal imports was among the finance ministry's key concerns. This financial year, imports were seen rising at a worrisome 40%, owing to a domestic shortage, further increasing the country's current account deficit (CAD). But 10 months into the current financial year, it appears the fears were grossly exaggerated. (BS)
- ❖ Congress-led government in Maharashtra on Thursday signed 32 MoUs with a total investment of Rs 23,842 crore and creation of job opportunities for 20,197 persons. (BS)
- ❖ Government's drive to break an infrastructure investment logjam has come too late to revive the economy before the forthcoming general election - and it could be years before it pays growth dividends for the next government. (BS)
- ❖ The exemption list in the Commodities transaction tax (CTT) may be reworked before the final budget is presented in May 2014. (BS)
- ❖ To ensure an accurate picture of the economic activity at a point of time, a new Index of Industrial Production (IIP) will include value of production of some capital goods in various phases of production instead of their volumes in the final stage. (BS)
- ❖ A weak rupee coupled with demand slump has pulled down coal imports by India -- the third-largest importer behind China and Japan -- to a mere 16% in the current financial year so far. (BS)

Domestic News

- ❖ Sundaram Infotech, the IT subsidiary of non-banking finance company Sundaram Finance, has bagged one of its biggest deals in the domestic market. (BS)
- ❖ ArcelorMittal, along with Nippon Steel and Sumitomo Metal Corporation (NSSMC), has completed acquisition of ThyssenKrupp AG's steel mill in the US for \$1.55 billion. (BS)
- ❖ In keeping with its stated objective of reaching 50 global markets by 2020, Hero MotoCorp Ltd (HMCL), the world's largest two-wheeler manufacturer, launched its operations in Turkey. (BS)
- ❖ Tech Mahindra GmbH, Düsseldorf, a wholly-owned German subsidiary of IT services and solutions firm Tech Mahindra, announced that it has signed an agreement with BASF Business Services Holding GmbH to acquire its subsidiary BASF Business Services Consult GmbH. (BS)
- ❖ JSW Steel, India's second largest steel maker in the domestic market acquired 50% stake last week in Punjab-based Vallabh Tinplate for about Rs 46 crore. (BS)
- ❖ Mahindra and Mahindra, the Mumbai-based utility vehicles and tractor manufacturer, signed a memorandum of understanding (MoU) with Government of Bhutan for a strategic partnership to promote the usage of electric vehicles in that country. (BS)
- ❖ PFC has asked Odisha to pay Rs 47 crore towards Sundergarh UMPP land cost. As Odisha has been allocated 1300 Mw of power from Odisha UMPP, the proportionate amount to be paid by Odisha is Rs 47.25 crore," it said in its letter last month. (BS)

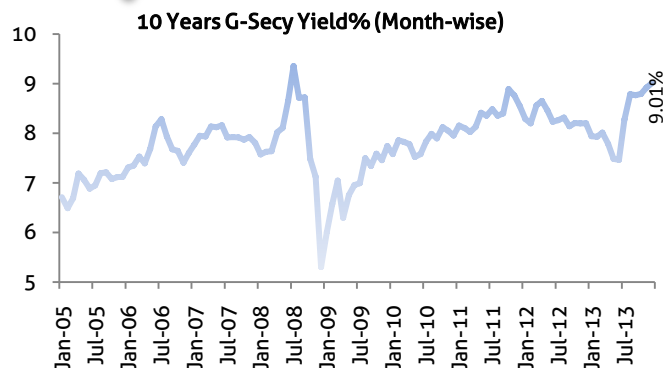
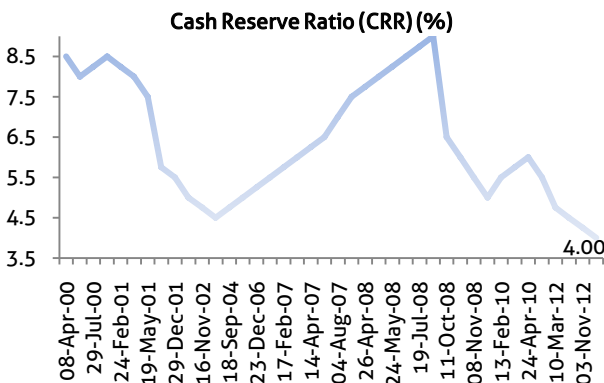
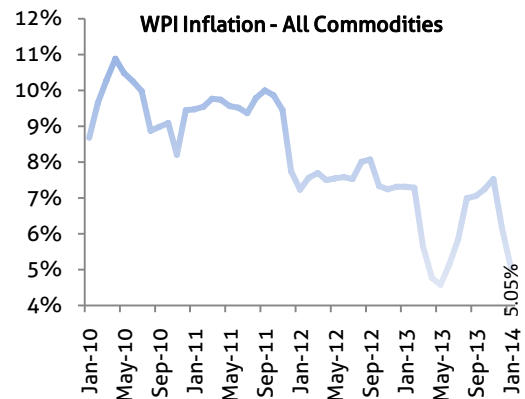
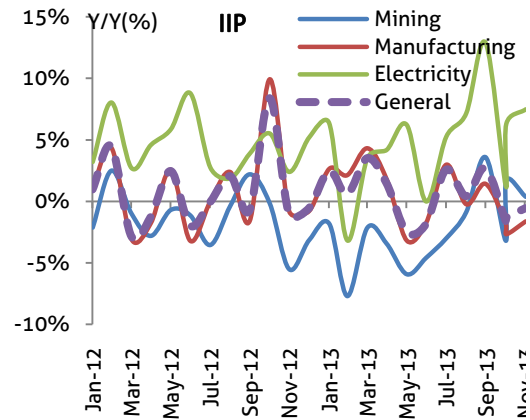
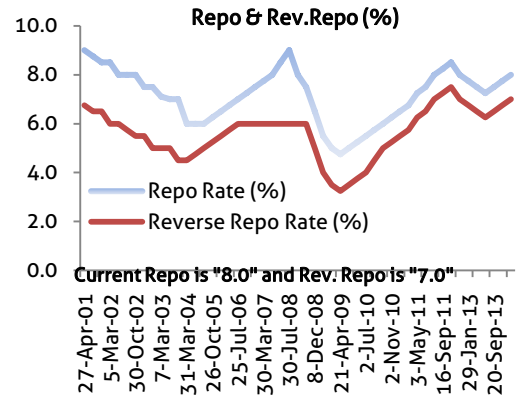
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3707	(0.0003)	(0.02)
GBP-USD	1.6685	(0.0003)	(0.02)
USD-JPY	101.89	(0.24)	(0.23)

Bond Markets	Closing	Chg
10-yr bond	9.15	0.5 bps
Interbank call	7.97	9.0 bps



Domestic News (Cont...)

- ❖ Private steel firm Essar Steel is likely to raise product prices by around Rs 1,000 per tonne next month on the back of rise in input costs and demand uptick during the past two months among others. (BS)
- ❖ The RP-Sanjiv Goenka group flagship, CESC, may have sought a steep 18% hike in tariff for the fiscal 2014-15, but state-run utility, the West Bengal State Electricity Distribution (WBSEDCL) is in a bind to reduce tariff. (BS)
- ❖ Chennai-based Polaris Financial Technology has been making headlines in the recent days stating that the company is likely to be acquired. Almost all the IT majors names were linked including Cognizant, Tech Mairndra, NEC and others. (BS)
- ❖ For Bangalore-based Infosys the year 2015 will be an action packed one. The company will not only get a new CEO but will also have a revamped board of directors. (BS)
- ❖ JSW Steel reported 17 per cent growth in crude steel production at 11.09 lakh tonnes (LT) for the month of January. (BS)
- ❖ Lupin Limited announced that it has received final approval for its Rifabutin capsules from the US food and Drugs Administration(USFDA) to market the generic version of Mycobutin capsules, used to prevent a disease condition in patients with advanced HIV infection. (BS)
- ❖ PFC has asked Odisha to pay Rs 47 crore as its share for the Sundergarh UMPP land cost. The state energy department has forwarded the request to Grid co Ltd for taking further action. (BS)
- ❖ State-owned Bhel said it has securing a contract for setting up 206 MW hydro electric power project in Punjab. (BS)
- ❖ The Competition Appellate Tribunal (Compat) stayed the penalty of Rs 1,773 crore slapped on state-run Coal India by the CCI for unfair trade practices. (BS)
- ❖ Private-sector lender, ICICI Bank has acquired 1.8 crore shares of Deccan Chronicle Holdings (DCHL) through the invocation of pledged shares on Wednesday. Post the acquisition, ICICI's stake in the media company jumped to 9.8% from 1.2% said a notice on the BSE website. (BS)
- ❖ Real estate developer Unitech has claimed that it has been regularly servicing the Rs 200-crore loan it had taken from LIC, even though a senior official of the life insurance major said they are looking into the account as it is a very serious matter. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Feb-14	Reliance Capital Limited	JANUS ASPEN SERIES AC JANUS ASPEN MID CAP VALUE PORTFOLIO	SELL	2500000	310.12
26-Feb-14	VST Industries Ltd.	HDFC MUTUAL FUND	SELL	207867	1590
26-Feb-14	Polaris Fin Tech Ltd	CROSSEAS CAPITAL SERVICES PVT. LTD.	SELL	795871	158.96
26-Feb-14	Welspun India Limited	KRISHIRAJ TRADING LIMITED	BUY	526126	101.45
26-Feb-14	Mahindra CIE Automative L	BLACKROCK INDIA EQUITIES FUND (MAURITIUS) LIMITED	BUY	623018	77

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Feb-14	Polaris Fin Tec	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	683,039	158.84
26-Feb-14	MAHINDCIE	BLACKROCK INV. MGT. (UK) LTD A/C BLROCK INV EQ FD (MAURITIUS) LTD	B	891,439	77
26-Feb-14	RADIX IND	RAGHU RAMA RAJU GOKARAJU	S	60,457	356.25
26-Feb-14	Exdon Trading	SINJAN OVERSEAS PVT LTD	S	500,000	14.35
26-Feb-14	Nikki Global	DHANRASHI PROMOTERS PRIVATE LIMITED	S	19,076	277.8

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532468	KAMAHOLDING-\$	26-Feb-14	2nd Interim Dividend - Rs.5.00	28-Feb-14
532899	Kaveri Seed	26-Feb-14	Interim Dividend - Rs.2.40	28-Feb-14
523539	Precision Wires	26-Feb-14	2nd Interim Dividend - Rs.4.00	28-Feb-14
532735	R Systems	26-Feb-14	Stock Split from Rs.10/- to Re.1/-	28-Feb-14
508954	SANJAY LEAS	26-Feb-14	Stock Split from Rs.10/- to Re.1/-	28-Feb-14
500870	Castrol India	28-Feb-14	Reduction of Capital	03-Mar-14
505712	Gujarat Auto	03-Mar-14	Stock Split from Rs.10/- to Rs.2/-	04-Mar-14
505537	Zee Entert	03-Mar-14	Scheme of Arrangement	04-Mar-14
532898	Power Grid Corp	04-Mar-14	Interim Dividend - Rs.-	05-Mar-14
533304	C. Mahendra Exports	05-Mar-14	Interim Dividend - Rs.0.10	06-Mar-14
532234	National Alum	05-Mar-14	Interim Dividend - Rs.1.10	06-Mar-14
502407	Nath Pulp	06-Mar-14	Consolidation of Shares	07-Mar-14
502407	Nath Pulp	06-Mar-14	Reduction of Capital	07-Mar-14
520113	Vesuvius India	06-Mar-14	Special Dividend with Interim - Rs.1.00	08-Mar-14
506260	Anuh Pharma	07-Mar-14	Interim Dividend - Rs.1.25	10-Mar-14
590106	BANK BEES	10-Mar-14	Dividend - Rs.11.00	11-Mar-14
590104	JUNIOR BEES	10-Mar-14	Dividend - Rs.1.00	11-Mar-14
500126	Merck	10-Mar-14	Dividend - Rs.8.50	-
590103	NIFTY BEES	10-Mar-14	Dividend - Rs.7.00	11-Mar-14
590109	SHARIA BEES	10-Mar-14	Dividend - Rs.2.00	11-Mar-14
500092	CRISIL	11-Mar-14	Final Dividend - Rs.4.00	-
500092	CRISIL	11-Mar-14	Special Dividend With Final - Rs.6.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
24-Feb-14	EUR	CPI (YoY)		0.70%	0.70%
24-Feb-14	USD	Chicago Fed National Activity			0.16
24-Feb-14	USD	Dallas Fed Mfg Business Index			3.8
25-Feb-14	USD	Chain Store Sales (YoY)			2.10%
25-Feb-14	USD	House Price Index (YoY)			7.60%
25-Feb-14	USD	S&P/CS HPI Composite - 20 (YoY)		13.10%	13.70%
25-Feb-14	USD	CB Consumer Confidence		80.1	80.7
25-Feb-14	USD	Richmond Manufacturing Index			12
26-Feb-14	GBP	GDP (YoY)		2.80%	2.80%
26-Feb-14	USD	MBA 30-Year Mortgage Rate			4.50%
26-Feb-14	USD	New Home Sales		410K	414K
27-Feb-14	USD	Durable Goods Orders (MoM)		-0.50%	-4.20%
27-Feb-14	EUR	Consumer Confidence		-13	-11.7
27-Feb-14	USD	KC Fed Manufacturing			5
28-Feb-14	JPY	Manufacturing PMI			56.6
28-Feb-14	JPY	Household Spending (YoY)		0.20%	0.70%
28-Feb-14	JPY	Tokyo CPI (YoY)			0.70%
28-Feb-14	JPY	Industrial Production (MoM)		3.00%	0.90%
28-Feb-14	JPY	Construction Orders (YoY)			4.90%
28-Feb-14	EUR	Unemployment Rate		12.00%	12.00%
28-Feb-14	USD	GDP (QoQ)		2.70%	3.20%
28-Feb-14	USD	Chicago PMI		58.2	59.6
28-Feb-14	USD	Michigan Consumer Sentiment			81.2
28-Feb-14	USD	Pending Home Sales (MoM)		3.50%	-8.70%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
28-Feb-14	INR	Indian GDP Quarterly (YoY)			4.80%

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