

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7790	(0.51)	CNX IT	10340	(0.58)
Sensex	26127	(0.55)	BANK NIFTY	15322	(1.37)
DowJones	16961	(0.72)	S&P CNX 500	6230	(0.77)
Nasdaq	4450	(0.50)	CNX FMCG	18742	0.71
Hangseng	24216	0.31	CNX REALTY	3552	(2.19)
Shanghai	2127	1.02	CNX AUTO	6945	(1.23)
Nikkei	15458	1.13	CNX ENERGY	9623	(1.55)
Strait Times	3350	(0.11)	CNX PHARMA	9168	2.81
Kospi	2034	0.36	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9439	(0.93)	Advances	918	385
FTSE	6792	(0.44)	Declines	2003	1160
CAC	4331	(1.82)	Unchanged	95	45
DAX	9644	(1.53)	Total	3016	1590

Nifty Gainers		
Company	Price(Rs)	Chg(%)
SUNPHARMA	782.75	4.62
LUPIN	1128.00	3.07
HINDUNILVR	662.00	2.97
ASIANPAINT	638.00	2.89
HDFC	1062.05	2.49

Nifty Losers		
Company	Price(Rs)	Chg(%)
TATAMOTORS	457.25	(5.77)
CAIRN	308.20	(4.43)
DLF	204.45	(4.42)
WIPRO	551.40	(4.41)
JINDALSTEL	282.15	(4.10)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Swaraj Engines	1.33	0.1	9
Bayer Crop	0.35	0.1	7
Torrent Pharma	1.62	0.2	7
Wockhardt	37.27	7.1	5
IBUL HSG FIN	3.63	0.7	5

Indian Forex	Closing	Chg	% Chg
USD/INR	60.145	0.143	0.24
GBP/INR	102.216	0.027	0.03
EUR/INR	81.017	0.339	0.42
JPY/INR	59.110	(0.020)	(0.03)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27702	(114)
Silver (Rs/1kg)	43880	(812)

Commodities	Price	% Chg.
Crude (US\$/BBL)	102.1	0.07
Brent (US\$/BBL)	108.4	1.16
Gold (US/oz)	1305.6	0.87
Silver (US\$/oz)	20.6	0.73
Copper (US\$/MT)	7183.5	0.45
Alum (US\$/MT)	2008.5	(0.25)
Zinc(US\$/MT)	2420.5	1.15

ADR	Cl. Values	% Chg.
ICICI Bank	50.63	(0.81)
HDFC Bank	48.24	(0.74)
Infosys	55.20	(0.57)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	44.97	0.47
Wipro	11.99	0.08
Tata Motors	40.52	(1.00)

## Market Sensor

US market finished lower on Friday weighed by Amazon's weak earnings and Visa's disappointing outlook, in addition to ongoing worries over geopolitical unrest. Dow Jones Industrial Average was down 0.72% or 123.23 points at 16960.57. Nasdaq Composite was down 0.50% or 22.54 points at 4449.56. Standard & Poor's 500 was down 0.48% or 9.64 points at 1978.34.

Indian Equity market edged lower in choppy trade on concerns, geopolitical tension in the Middle East and Ukraine could push oil prices higher. Nifty ended the previous trading session with a decline of 0.51% or 40.15 points at 7790.45. On Friday's trading session, FIIs bought net Rs.125.51 Cr in cash market and bought net Rs.126.44 in derivative segment. Whereas, DII sold net Rs.210.02 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7750 followed by 7700 while resistance is seen at 7850 followed by 7910**

## Global News

❖ The U.K. has completely recovered the output lost during the financial crisis and is on track to be the best-performing Group of Seven economy this year. (Bloomberg)

❖ Russia's central bank unexpectedly increased borrowing costs for a third time this year as the intensifying conflict over Ukraine and the threat of wider sanctions squeeze the economy and undercut the ruble. (Bloomberg)

❖ China released two measures of unemployment that had a divergence of almost 1 percentage point, underscoring a lack of clarity on the job market in the world's second-largest economy. (Bloomberg)

❖ President Barack Obama is running out of time to fill two empty seats on the Federal Reserve Board of Governors this year, just as U.S. central bankers start to lay plans to exit from record monetary easing. (Bloomberg)

❖ Two years since European Central Bank President Mario Draghi's historic promise to defend his currency bloc, there are signs bond investors are growing too complacent under his protection. (Bloomberg)

## Economic News

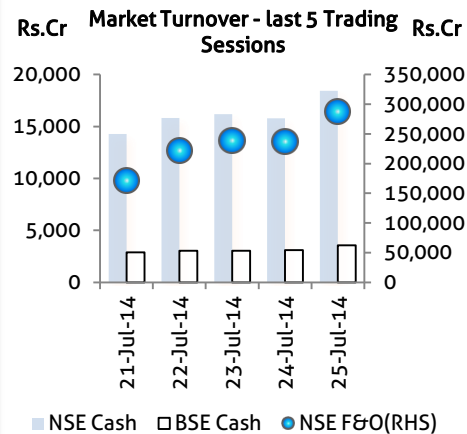
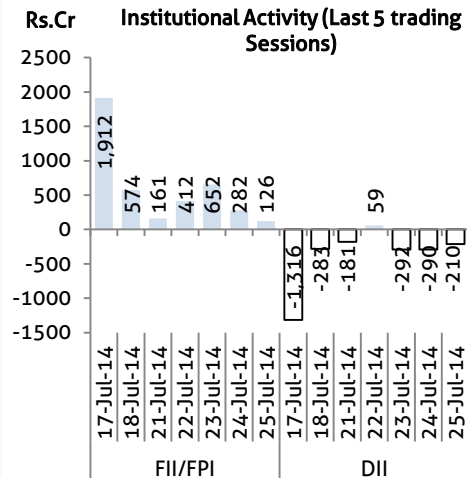
- ❖ In a bid to liberalise permit raj that governs agro-forestry, the Union environment ministry has issued fresh guidelines to simplify the rules for growing, felling and transportation of trees grown on private lands. (BS)
- ❖ Public sector body SCOPE expressed concern over the large number of pending arbitration cases of CPSEs, saying these result in a huge loss of time and money affecting their brand value, and also urged for faster disposal of such matters. (BS)
- ❖ The government released lesser funds than provided in the budget for some flagship schemes including rural job guarantee and Nirmal Bharat Abhiyaan, Parliament was informed. (BS)
- ❖ With increase in number of complaints from people buying products online, the Consumer Affairs Ministry is proposing to frame guidelines for protection of consumers' interest in online shopping. (BS)
- ❖ Rejecting the demand to hike import duty on sugar to 40%, the Finance Ministry said the levy will be retained at the existing level of 15%. (BS)
- ❖ Corporate frauds worth more than Rs 10,800 crore have been detected by investigation agency SFIO during its probes in nearly three-and-half years. (BS)
- ❖ The Finance Ministry said at present it has no proposal to lower customs duty on gold from the current 10%. (BS)
- ❖ As the states in north are taking initiatives to mobilise more investments by revising their industrial policies and encouraging use of on-line approvals and tax payments, to get rid of red-tapism, the small entrepreneurs are upbeat over the better business environment. (BS)
- ❖ Reasonable tax rates lead to voluntary compliance in paying taxes and government has means like search and seizure to make people pay their dues, the Lok Sabha was informed. (BS)
- ❖ Arunachal Pradesh is facing a power deficit of 156 million units a year against annual power demand of 793 MU, the state assembly was informed. (BS)
- ❖ The Project Monitoring Group under the Cabinet secretariat of Government of India will launch a web-based clearance system for issues related to environment, mining and coal linkages of the stalled projects, from September. (BS)
- ❖ The monetary policy and its formulation may see a sea change in the way it happens currently, much of it a closed door affair followed by statement by the central bank – the Reserve Bank of India. (BS)

## Domestic News

- ❖ Ashok Leyland has reported a loss of Rs 47.95 crore during the quarter ended June 30, 2014 as compared to Rs 141.75 crore, during the same period last year. Company's total income rose to Rs 2,477.80 crore from Rs 2,363.81 crore. (BS)
- ❖ Non-banking lender Karvy Finance has entered the commercial vehicle financing with a targeted offering for funding small CV purchases, even as a majority of lenders struggle in this space with their loan books. (BS)
- ❖ Closing a seven-year-old front running case at HDFC Mutual Fund, Sebi has barred former equity dealer Nilesh Kapadia and three others from the markets and ordered return of over Rs 1.75 crore worth illegal gains. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3430	(0.0034)	(0.25)
GBP-USD	1.6975	(0.0011)	(0.06)
USD-JPY	101.84	0.02	0.02

Bond Markets	Closing	Chg
10-yr bond	8.64	-3.8 bps
Interbank call	8.73	-2.7 bps



## Domestic News (Cont...)

❖ Tata Motors-owned Jaguar Land Rover has agreed to cut prices of three models in China by 5-7% after being targeted by an anti-trust campaign that forced the local government to issue the order. (BS)

❖ 'Sahara: The Untold Story', the book written by financial journalist Tamal Bandyopadhyay to demystify the largely unlisted Sahara India Group headed by Subrata Roy, could well be made into a Bollywood film. (BS)

❖ Edelweiss Financial Services has announced 41% growth in net profit in the April-June quarter. (BS)

❖ Global Cloud Xchange, the submarine cable entity of Reliance Communications (RCom), on Friday, announced raising \$350 million (about Rs 2,100 crore) through a debt bond from overseas market to refinance debt. (BS)

❖ Adani Group is in talks with diversified Jaypee Group for acquiring some of its hydro projects in a deal worth over Rs 11,000 crore. (BS)

❖ As many as ten fertiliser plants out of 23 operated by state-run companies are closed, while 7 others are suffering losses, Parliament was informed. (BS)

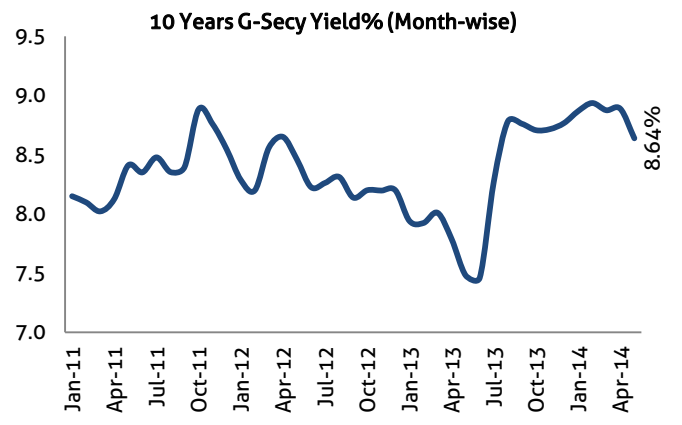
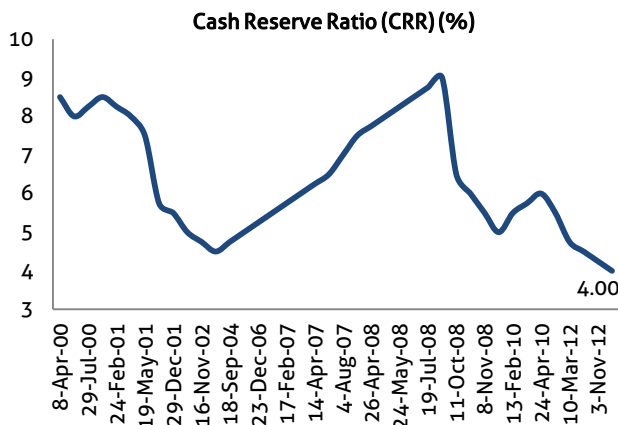
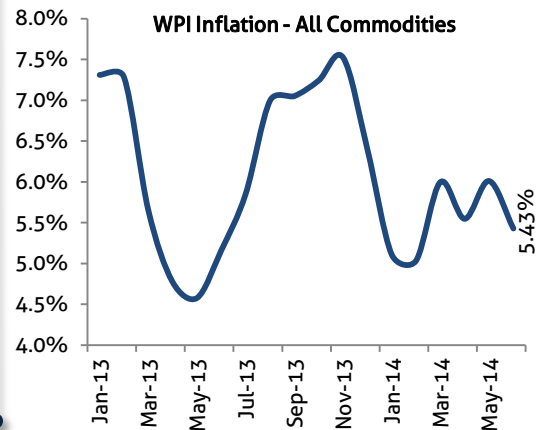
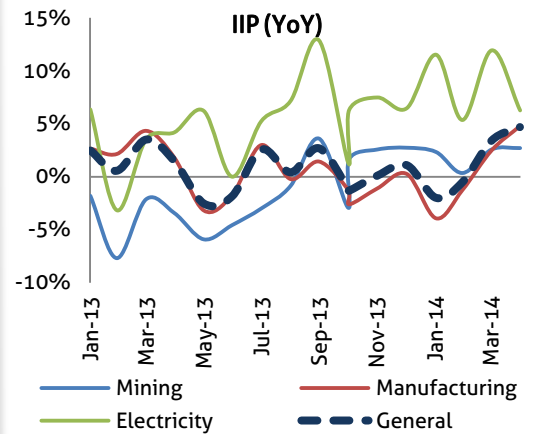
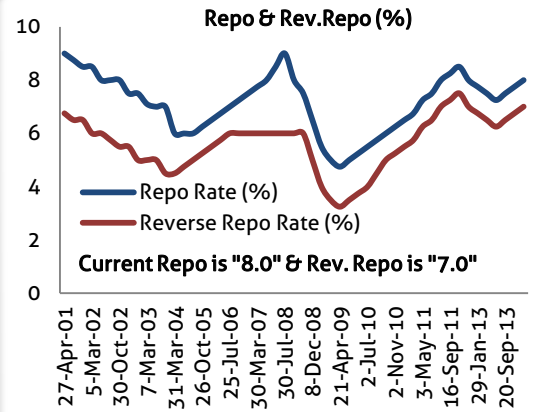
❖ Finance Minister Arun Jaitley said the government will sell 10% stake each in Hindustan Aeronautics (HAL) and RINLand 5% in SAIL in the current fiscal. (BS)

❖ After steering BPO company Firstsource Solutions Ltd to new heights, the diversified RP-Sanjiv Goenka Group is aiming for more acquisitions in the information and technology space. (BS)

❖ With some respite in its borrowing cost in the first quarter due to the profit it had made last year and on higher capital base, SKS Microfinance has announced 1 percentage point reduction in lending rates. (BS)

❖ Battery maker Eveready Industries India Ltd reported over two-fold increase in standalone net profit at Rs 10.6 crore in the first quarter ended June 30, 2014. (BS)

❖ The government said it would be premature to form any opinion at this stage on whether companies are resorting to tactics to avoid CSR spending. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jul-14	Wockhardt Ltd.	N.K. SECURITIES	SELL	824895	731.9
25-Jul-14	Tata Sponge Iron Ltd.	ESTEE ADVISORS PVT LTD	SELL	188693	1131.9
25-Jul-14	Tata Metaliks Ltd	GAJANAN ENTERPRISES	SELL	486730	138.2
25-Jul-14	Kaushalya Infrastructure	SHREE GANESH TRADERS (MUKESH KUMAR)	BUY	400000	11.1
25-Jul-14	VKS Projects Limited	CHERRY COSMETICS PVT LTD	BUY	8855250	0.4

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Jul-14	Tata Sponge	A K G SECURITIES AND CONSULTANCY LTD	S	93,713	1138.5
25-Jul-14	RADIX IND	RAGHU RAMA RAJU GOKARAJU	S	60,000	366.6
25-Jul-14	Tata Metaliks	GAJANAN ENTERPRISES	S	128,118	138.0
25-Jul-14	Jaysynth Dye	JYOTI SHIVONKAR MAHESHWARI	S	300,000	41.0
25-Jul-14	Pokarna	PREMIER INVESTMENT FUND LIMITED	B	44,494	274.0

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500410	ACC	28-Jul-14	Interim Dividend - Rs.15.00	30-Jul-14
506767	Alkyl Amines-\$	28-Jul-14	Dividend - Rs.8.00	-
532215	Axis Bank	28-Jul-14	Stock Split from Rs.10/- to Rs. 2/-	30-Jul-14
533336	Dhunseri Inv	28-Jul-14	Dividend - Rs.1.25	-
531599	FDC	28-Jul-14	Final Dividend - Rs.2.25	-
506803	Fulford India-\$	28-Jul-14	Final Dividend - Rs.2.00	-
523574	Future Retail	28-Jul-14	Dividend - Rs.0.60	-
570002	Future Retail	28-Jul-14	Dividend - Rs.0.64	-
500676	Glaxosmithkl Cons	28-Jul-14	Dividend - Rs.45.00	-
533150	GODREJ PROP	28-Jul-14	Dividend - Rs.2.00	-
505893	Hindustan Hardy	28-Jul-14	Dividend - Rs.3.00	-
531841	Indus Finance Corp	28-Jul-14	Dividend - Rs.0.50	-
532054	KDDL-\$	28-Jul-14	Dividend - Rs.1.50	-
508989	NAVNETEDUL	28-Jul-14	Dividend - Rs.2.00	-
532742	Paushak	28-Jul-14	Dividend - Rs.3.00	-
530017	Standard Inds	28-Jul-14	Dividend - Rs.0.75	-
514138	Suryalata Spin-\$	28-Jul-14	Dividend - Rs.1.50	-
532540	TCS	28-Jul-14	Interim Dividend - Rs.5.00	30-Jul-14
532540	TCS	28-Jul-14	Special Dividend - Rs.40.00	30-Jul-14
532375	Tips Inds	28-Jul-14	Final Dividend - Rs.1.00	-
524200	Vinati Organics-\$	28-Jul-14	Dividend - Rs.3.00	-
509966	VST Inds	28-Jul-14	Final Dividend - Rs.70.00	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
28-Jul-14	USD	Pending Home Sales (MoM)		0.50%	6.10%
28-Jul-14	USD	Dallas Fed Mfg Business Index			11.4
29-Jul-14	JPY	Retail Sales (YoY)		-0.50%	-0.40%
29-Jul-14	GBP	BoE Consumer Credit		0.80B	0.74B
29-Jul-14	GBP	Mortgage Lending		1.90B	1.99B
29-Jul-14	USD	S&P/CS HPI Composite - 20 (YoY)		10.00%	10.80%
29-Jul-14	USD	CB Consumer Confidence		85.3	85.2
30-Jul-14	JPY	Industrial Production (MoM)		-1.20%	0.70%
30-Jul-14	EUR	Consumer Confidence		-8	-7.5
30-Jul-14	USD	MBA 30-Year Mortgage Rate			4.33%
30-Jul-14	USD	ADP Nonfarm Employment Change		230K	281K
30-Jul-14	USD	GDP (QoQ)		3.00%	-2.90%
31-Jul-14	GBP	Nationwide HPI (MoM)		0.50%	1.00%
31-Jul-14	EUR	CPI (YoY)		0.50%	0.50%
31-Jul-14	EUR	Unemployment Rate		11.60%	11.60%
31-Jul-14	USD	Initial Jobless Claims		300K	284K
31-Jul-14	USD	Chicago PMI		63	62.6
01-Aug-14	JPY	Manufacturing PMI		50.8	51.5
01-Aug-14	CNY	Chinese HSBC Manufacturing PMI			52
01-Aug-14	EUR	Manufacturing PMI		51.9	51.9
01-Aug-14	GBP	Manufacturing PMI		57.2	57.5
01-Aug-14	USD	Core PCE Price Index (MoM)		0.10%	0.20%
01-Aug-14	USD	Nonfarm Payrolls		235K	288K
01-Aug-14	USD	Personal Spending (MoM)		0.40%	0.20%
01-Aug-14	USD	Private Nonfarm Payrolls		230K	262K
01-Aug-14	USD	Unemployment Rate		6.10%	6.10%
01-Aug-14	USD	Manufacturing PMI			56.3
01-Aug-14	USD	Michigan Consumer Sentiment		81.8	81.3
01-Aug-14	USD	Construction Spending (MoM)		0.50%	0.10%
01-Aug-14	USD	ISM Manufacturing PMI		56	55.3

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
31-Jul-14	INR	Infrastructure Output (YoY)			2.30%
01-Aug-14	INR	HSBC Markit Manufacturing PMI			51.5

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