

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5886	(0.36)	CNX IT	7663	(0.20)
Sensex	19748	(0.29)	BANK NIFTY	10465	(1.40)
DowJones	15559	0.02	S&P CNX 500	4507	(0.54)
Nasdaq	3613	0.22	CNX FMCG	18743	0.31
Hangseng	21969	0.31	CNX REALTY	182	(1.35)
Shanghai	2011	(0.51)	CNX AUTO	4528	(0.44)
Nikkei	14130	(2.97)	CNX ENERGY	8009	(0.30)
Strait Times	3236	0.01	CNX PHARMA	7158	0.40
Kospi	1911	0.06	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8149	(0.17)	Advances	835	346
FTSE	6555	(0.50)	Declines	1433	823
CAC	3969	0.32	Unchanged	158	62
DAX	8245	(0.65)	Total	2426	1231

Nifty Gainers		
Company	Price(Rs)	Chg(%)
AMBUJACEM	179.95	5.23
ITC	368.80	2.76
SUNPHARMA	1121.00	2.35
HEROMOTOCO	1868.80	2.22
M&M	896.50	1.88

Nifty Losers		
Company	Price(Rs)	Chg(%)
HINDALCO	94.35	(7.68)
PNB	590.75	(5.58)
SESAGOA	133.20	(4.82)
COALINDIA	282.00	(4.20)
HINDUNILVR	662.00	(3.77)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Sterling Hol Res-\$	45.13	4.88	9.25
HATHWAY CAB	5.09	0.58	8.81
ING Vysya Bank	2.15	0.34	6.26
SKS Microfinance	7.38	1.48	4.98
NMDC	6.92	1.43	4.85

Indian Forex	Closing	Chg	% Chg
USD/INR	58.9133	(0.0282)	(0.05)
GBP/INR	90.6794	0.2042	0.23
EUR/INR	78.2180	0.3512	0.45
JPY/INR	59.6700	0.6600	1.12

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27625	282
Silver (Rs/1kg)	41347	837

Commodities	Price	% chg.
Crude (US\$/BBL)	104.7	(0.85)
Brent (US\$/BBL)	107.2	(0.58)
Gold (US/oz)	1321.9	(1.30)
Silver (US\$/oz)	19.8	(2.61)
Copper (US\$/MT)	6905.5	(0.32)
Alum (US\$/MT)	1761.5	(1.29)
Zinc(US\$/MT)	1832.5	(0.35)

ADR	Cl. Values	% Chg.
ICICI Bank	34.25	(0.73)
HDFC Bank	35.24	(0.80)
Infosys	49.85	(0.10)
Sterlite Inds.	5.32	(0.41)
Dr Reddy's Labs	39.23	(0.19)
Wipro	8.25	0.01
Tata Motors	24.74	(0.33)

## Market Sensor

U.S market erased their earlier losses to eke out small gains Friday, with the Dow squeezing out its fifth-consecutive weekly rally, as investors digested the latest batch of mixed earnings reports and ahead of a busy economic calendar next week. Dow Jones Industrial Average was up 0.02% or 3.22 points at 15558.83. Nasdaq Composite was up 0.22% or 7.98 points at 3613.17. Standard & Poor's 500 was up 0.08% or 1.40 points at 1691.65.

Indian markets continued its corrective decline on liquidity squeezing measures adopted by the RBI to strengthen INR. Nifty ended the previous trading session with a decline of 0.36% or 21.30 points at 5886.20. On Friday's trading session, FII's bought net Rs.278.04 Cr in cash market and bought net Rs 1614.75 Cr. in derivative segment. Whereas, DII sold net Rs.489.17 Cr in cash segment.

**Coming to today's trade, Nifty to remain rangebound with bargain hunting might emerge at lower level while 5950-5970 would offer strong resistance in case of any relief rally effort from the bulls.**

## Global News

❖ A copper price collapse of more than 60 percent, zinc cut by up to a half and oil down to \$70 a barrel. That's the fate facing world commodity markets should China's growth dip to 3 percent in the next three years -- a scenario economists at Barclays Plc (BARC) are now examining. (Bloomberg)

❖ President Barack Obama said his nominee for Federal Reserve chairman will be someone who embraces the central bank's dual mandate to promote price stability and maximum employment, and he has narrowed his choice "to some extraordinarily qualified candidates." (Bloomberg)

❖ European Union and Chinese negotiators reached an agreement to curb EU imports of solar panels from China in exchange for exempting the shipments from punitive tariffs. (Bloomberg)

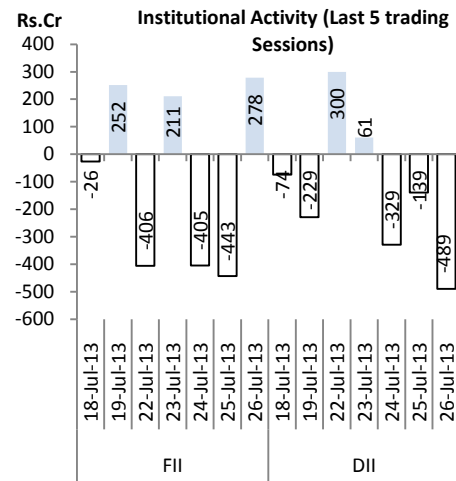
❖ Employers probably added jobs in July at about the same pace as in the prior month, helping trim unemployment as the U.S. economy emerged from a second-quarter slowdown, economists said before reports this week. (Bloomberg)

## Economic News

- ❖ The government has modified the New Coal Distribution Policy in view of the presidential directive asking state-owned CIL to enter into pacts for assured supply of fuel to power firms ms 78,000 MW capacity. (BS)
- ❖ The contribution of the real estate sector to India's GDP has been estimated at 6.3% in 2013, and the segment is expected to generate 7.6 million jobs in the same period, according to a report .(BS)
- ❖ Over \$21 billion powers plants being stranded for want of fuel notwithstanding, an Empowered Group of Ministers (EGoM) may not give any significant natural gas to the fuel-starved units till domestic production rises in 2016-17 .(BS)
- ❖ With the \$87 billion software export industry being hit by the new USimmigration law, IT services industry body Nasscom has hired influential lobbyist, public relation and law firms to plead the case of Indian firms with Congressmen (BS)
- ❖ The fertiliser sector in the country would require minimum investment of Rs 40,000 crore by 2016-17 to achieve aimed urea capacity of 33 million tonnes, as per the report of the working group on fertiliser industry.(BS)
- ❖ Global retailers are getting into smaller details such as demanding that they be allowed to procure items like bread and locks from big domestic companies under the mandatory 30% sourcing norms in multi-brand segment, but DIPP is having none of that(BS)
- ❖ The Department of Telecom is planning to approach sector regulatorTRAI for its recommendations on spectrum trading, which can allow even private entities to sell or lease airwaves for services. (BS)
- ❖ The government has received a Rs 1,770-crore investment proposal from a domestic company for the manufacturing of telecom products (BS)

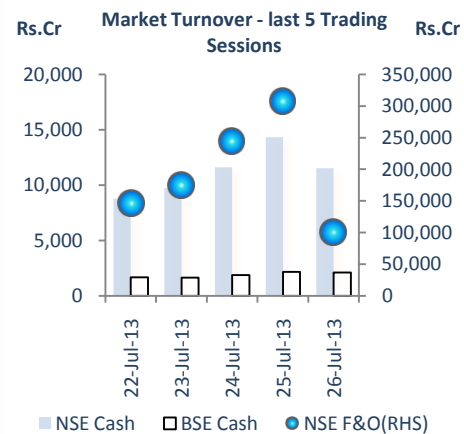
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3279	0.0002	0.02
GBP-USD	1.5382	(0.0008)	(0.05)
USD-JPY	98.21	(1.08)	(1.09)

Bond Markets	Closing	Chg
10-yr bond	8.35	-13.8 bps
Interbank call	9.88	160 bps



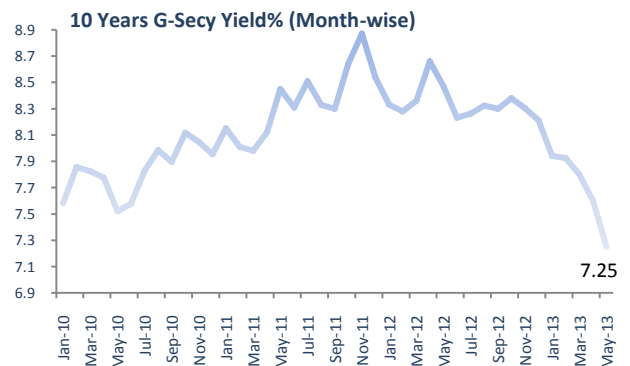
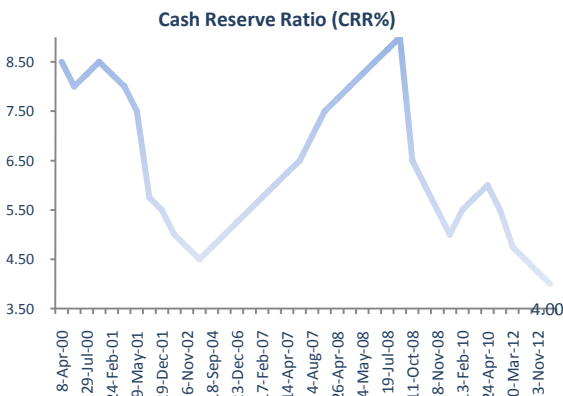
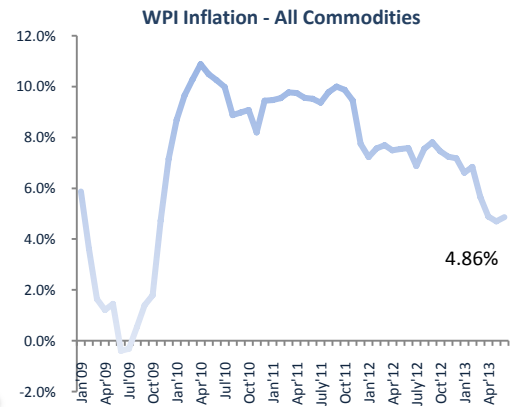
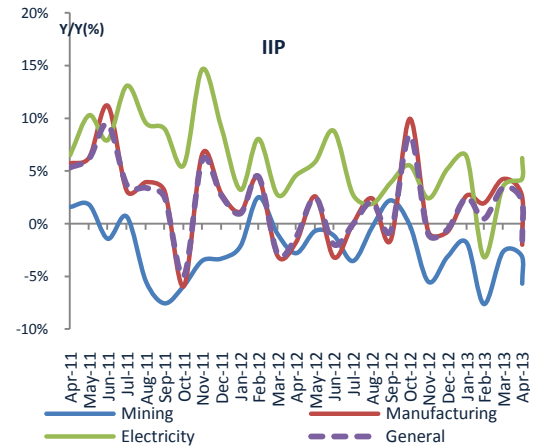
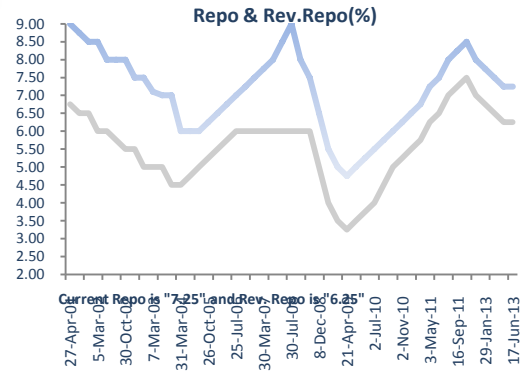
## Domestic News

- ❖ Car rental firm Carzonrent plans to invest up to Rs 1,400 crore in the next four years to expand its fleet and start operations in 65 new cities.(BS)
- ❖ Financial services conglomerate HDFC Ltd has enhanced its investments in government securities and public second bonds, even as it sold shares of many blue-chip companies including TCS, Wipro and Tata Motors. (BS)
- ❖ After securing approval of the Madras High Court, VedantaResources is now hoping to complete the much-delayed merger ofSesa Goa and Sterlite Industries within a month after getting a favourable verdict from the Bombay High Court as well, a senior company official said. (BS)
- ❖ Amid speculation about fate of its existing \$18 billion India projects, global steel giant ArcelorMittal has said it continues to pursueJharkhand and Karnataka projects with progress on land acquisition and raw material security front. (BS)
- ❖ Pharma companies, operating in the American market, may witness a significant rise in their cost of generic development starting next year. This is because companies will have to submit data for three batches of their products, up from one batch currently, while seeking drug approvals in the US. The data includes those from safety, efficacy and stability study of a drug. (BS)
- ❖ Graduate engineers and junior telcom officers of state-run BSNL will go on indefinite strike from Monday if their demands were not met, an employees' association of the PSU said. (BS)



## Domestic News(Conti..)

- ❖ Realty firm Godrej Properties' net debt increased by 8% to over Rs 1,600 crore during the first quarter of this fiscal, while sales bookings were up 15% at Rs 606 crore. (BS)
- ❖ Homegrown FMCG major Emami Ltd is scouting for acquisitions to strengthen its market position, for which it is ready to use cash reserves of Rs 300 crore and leverage its borrowing potential, according to company Managing Director Sushil K Goenka. (BS)
- ❖ The Finance Ministry is considering a proposal to allow five private fund managers to manage pension corpus of government employees. (BS)
- ❖ Coal Minister Sriprakash Jaiswal is expected to review the performance of state-owned CIL, which has been missing production target, in a meeting likely on August 7. (BS)
- ❖ As many Indian drugmakers find themselves on wrong side of American rules, the US health regulator FDA says they are finding contaminants like filth, pesticides and insect parts in drugs manufactured here, but similar problems exist in many other countries as well. (BS)
- ❖ Goa Mines and Geology Department has issued notices to 40 mining firms asking them to pay royalties amounting to Rs 34 crore, which it says was due after the final assessment for financial year 2012-13. (BS)
- ❖ JK Lakshmi Cement clocked 68.77% decline in the first quarter net profit at Rs 15.70 crore, on lower sales and realisation. (BS)
- ❖ Nestle India reported a 10.33% increase in net profit at Rs 271.38 crore during the April-June quarter, backed by lower finance costs. It had reported Rs 245.97 crore of net profit during the corresponding quarter previous fiscal year. (BS)
- ❖ McLeod Russel India has recorded a 35.37% increase in net profit to Rs 26.21 crore in the quarter ended June 30, 2013. (BS)
- ❖ Diversified conglomerate ITC is aiming to clock in a turnover of Rs 1,00,000 crore from its brands in the new FMCG businesses by 2025. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Jul-13	Apollo Hospitals Ltd	PCR INVESTMENTS LIMITED	BUY	920000	979.49
26-Jul-13	ICRA Limited	ROUTE ONE FUND I LP	BUY	50216	1099.58
26-Jul-13	Reliance Brdct Ntwrk Ltd	RELIANCE SHARE AND STOCK BROKERS PRIVATE LIMITED	BUY	436060	43.06
26-Jul-13	Nucent Finance Limited	SMITA AGARWAL	SELL	100000	12.95
26-Jul-13	REI Six Ten Retail Limite	INDUS INDIA FUND MAURITIUS LIMITED	SELL	854915	0.5

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Jul-13	Kirloskar Pneu	KIRLOSKAR INDUSTRIES LIMITED	B	100000	479.93
26-Jul-13	Aagam Cap	MONO HERBICIDES PVT. LTD.	B	302000	116.15
26-Jul-13	RBN	RELIANCE SHARE AND STOCK BROKERS PRIVATE LIMITED	B	449843	43.13
26-Jul-13	East Coast Steel	NORTH MALA BAR TOURS PRIVATE LIMITED	S	100000	61.2
26-Jul-13	JRIIL	SARA INTERNATIONAL LTD	S	141300	23.9

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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	-
505585	Kovalam Invest	29-Jul-13	BONUS 13:10	7-Aug-13
534690	Lakshmi Vilas Bank	29-Jul-13	Dividend - Rs.3.00	-
500257	Lupin	29-Jul-13	Dividend - Rs.4.00	-
508989	Navneet Pub	29-Jul-13	Final Dividend - Rs.1.80	-
530017	Standard Inds	29-Jul-13	Dividend - Rs.0.75	-
532374	Sterlite Tech	29-Jul-13	Final Dividend - Rs.0.30	-
524715	Sun Pharma	29-Jul-13	BONUS 1:1	-
532540	TCS	29-Jul-13	Interim Dividend - Rs.4.00	-
516098	Ventura Tex	29-Jul-13	Consolidation of Shares	30-Jul-13
516098	Ventura Tex	29-Jul-13	Reduction of Capital	30-Jul-13
500410	ACC	30-Jul-13	Interim Dividend - Rs.11.00	31-Jul-13
512599	Adani Enter	30-Jul-13	Dividend - Rs.1.40	-
532921	Adani Ports	30-Jul-13	Final Dividend - Rs.1.00	-
500710	AKZOINDIA	30-Jul-13	Special Dividend - Rs.60.00	-
500710	AKZOINDIA	30-Jul-13	Dividend - Rs.20.00	-
500425	Ambuja Cements	30-Jul-13	Interim Dividend - Rs.1.40	31-Jul-13
533227	Asian Hotels (East)	30-Jul-13	Dividend - Rs.4.50	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
29-Jul-13	JPY	Retail Sales (YoY)		1.90%	0.80%
29-Jul-13	USD	Pending Home Sales (MoM)		-1.00%	6.70%
30-Jul-13	EUR	Consumer Confidence		-17	-18.8
30-Jul-13	USD	CB Consumer Confidence		81.3	81.4
31-Jul-13	USD	ADP Nonfarm Employment Change		180K	188K
31-Jul-13	USD	GDP (QoQ)		1.00%	1.80%
1-Aug-13	CNY	Chinese HSBC Manufacturing PMI			47.7
1-Aug-13	GBP	Interest Rate Decision		0.50%	0.50%
1-Aug-13	EUR	Interest Rate Decision		0.50%	0.50%
1-Aug-13	USD	Initial Jobless Claims		345K	343K
1-Aug-13	USD	Construction Spending (MoM)		0.40%	0.50%
1-Aug-13	USD	ISM Manufacturing Index		52	50.9
2-Aug-13	GBP	Construction PMI		51.5	51
2-Aug-13	USD	Nonfarm Payrolls		185K	195K
2-Aug-13	USD	Personal Spending (MoM)		0.50%	0.30%
2-Aug-13	USD	Unemployment Rate		7.50%	7.60%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Jul-13	INR	Indian Interest Rate Decision		7.30%	7.25%
1-Aug-13	INR	HSBC Markit Manufacturing PMI			50.3

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