

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6715	(0.68)	CNX IT	9252	(0.10)
Sensex	22466	(0.73)	BANK NIFTY	12911	(1.31)
DowJones	16535	0.53	S&P CNX 500	5286	(0.67)
Nasdaq	4104	0.72	CNX FMCG	17557	(0.89)
Hangseng	22211	(1.08)	CNX REALTY	190	(0.76)
Shanghai	2024	0.20	CNX AUTO	5844	(1.07)
Nikkei	14322	0.23	CNX ENERGY	8335	(0.44)
Strait Times	3260	0.69	CNX PHARMA	8107	(0.19)
Kospi	1967	0.10	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8834	(0.43)	Advances	1253	600
FTSE	3209	1.35	Declines	1528	868
CAC	6770	1.04	Unchanged	129	80
DAX	4498	0.83	Total	2910	1548

Nifty Gainers		
Company	Price(Rs)	Chg(%)
AMBUJACEM	203.00	1.45
GRASIM	2680.00	1.39
BPCL	461.45	1.10
ACC	1299.30	0.95
TECHM	1839.00	0.75

Nifty Losers		
Company	Price(Rs)	Chg(%)
JINDALSTEL	249.00	(9.01)
TATASTEEL	405.00	(4.88)
HINDUNILVR	561.50	(3.36)
TATAPOWER	80.45	(3.01)
HINDALCO	137.40	(2.73)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
ICRA	0.35	0.0	348
Century Ply-\$	17.25	0.4	47
Sterling Hol Res-\$	62.67	1.6	40
Tata Sponge	5.11	0.3	18
Sun Pharma Adv	24.43	2.0	13

Indian Forex	Closing	Chg	% Chg
USD/INR	60.525	0.021	0.04
GBP/INR	101.773	0.084	0.08
EUR/INR	83.916	0.295	0.35
JPY/INR	59.010	(0.160)	(0.27)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29725	(225)
Silver (Rs/1kg)	41895	(564)

Commodities	Price	% Chg.
Crude (US\$/BBL)	100.4	(0.50)
Brent (US\$/BBL)	108.6	0.34
Gold (US/oz)	1295.3	(0.01)
Silver (US\$/oz)	19.5	(0.46)
Copper (US\$/MT)	6770.0	(0.18)
Alum (US\$/MT)	1779.5	(1.17)
Zinc(US\$/MT)	2052.0	(0.46)

ADR	Cl. Values	% Chg.
ICICI Bank	43.40	0.02
HDFC Bank	39.75	0.20
Infosys	53.27	0.35
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	44.62	(0.11)
Wipro	11.97	(0.06)
Tata Motors	37.17	0.00

## Market Sensor

US stocks rose on Tuesday, boosted by upbeat results from companies including Merck & Co and a rebound in Facebook and other high-growth shares. The Dow Jones industrial average rose 86.63 points or 0.53 percent, to 16,535.37, the S&P 500 gained 8.9 points or 0.48 percent, to 1,878.33 and the Nasdaq Composite added 29.14 points or 0.72 percent, to 4,103.54.

Indian stocks fell for the third day in a row on Tuesday, triggered by the India Meteorological Department (IMD) on Thursday, 24 April 2014, announcing that the country will likely get below-normal levels of monsoon rain this year. The S&P BSE Sensex fell 165.42 points or 0.73% to 22,466.19 while the CNX Nifty fell 46 points or 0.68% to 6,715.25, lowest closing level since 16 April 2014. On Tuesday's trading session, FII's bought net Rs. 287.98 Cr in cash market whereas, DII sold net Rs. 550.89 Cr in cash segment.

**Coming to today's trade Indian markets are expected to trade in a range following mixed trend seen in other Asian markets.**

## Global News

❖ Americans grew concerned in April that jobs have become more difficult to land, prompting an unexpected drop in confidence from a six-year high. (Bloomberg)

❖ China is poised to overtake the U.S. as the world's biggest economy, while India has vaulted into third place, ahead of Japan, using calculations that take exchange rates into account. (Bloomberg)

❖ European Union banks will be ranked on how well they can withstand a 21.2 percent slump in home values, coupled with a surge in unemployment and plummeting economic growth, as part of the bleakest scenario in the most severe EU stress test to date. (Bloomberg)

❖ U.K. economic growth accelerated in the first quarter as the recovery broadened, leaving output excluding oil and gas back above its pre-recession peak. (Bloomberg)

❖ German inflation (GRCP2HY) accelerated less than economists forecast in April, increasing pressure on the European Central Bank to add stimulus in the euro area. (Bloomberg)

❖ Euro-area economic confidence unexpectedly fell in April, increasing pressure on the European Central Bank as it considers unprecedented steps to avert the risk of deflation. (Bloomberg)

## Economic News

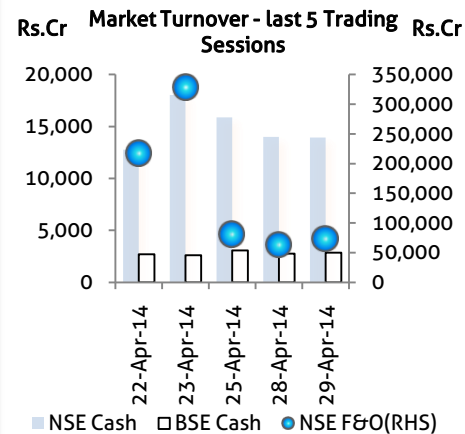
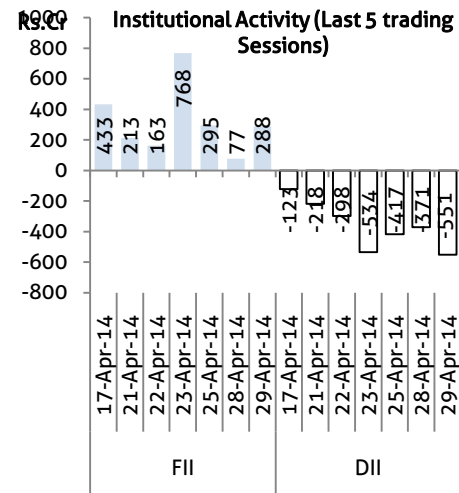
- ❖ The Union ministry of chemicals & petrochemicals has invited comments from the Odisha government to revise its existing PCPIR (Petroleum, Chemicals & Petrochemicals Investment Region) policy, 2007 to make it more functional. (BS)
- ❖ The third e-auctioning to sell six lakh tonnes of iron ore lying at Goa's port and jetties would be held on May 10, a senior mines official said. (BS)
- ❖ The Indian Meteorological Department (IMD) is not known for its quality of monsoon predictions. In the ten years between 2000-09, the rainfall has been within 2 per cent of IMD's projection only twice. IMD has been off the mark by nearly 20 per cent twice and off target by more than 10 per cent twice. More importantly IMD has been wrong in the drought years. (BS)
- ❖ India has displaced Japan to become the world's third biggest economy in terms of purchasing power parity (PPP), according to a World Bank report released on Tuesday. (ET)
- ❖ The agriculture ministry is making unprecedented preparations to counter impact of weak monsoon rains, which will be the top priority for the new government. (ET)
- ❖ The government's efforts to narrow fiscal deficit since last two years by expenditure cuts has resulted in lower productive spending, and the new government would find it challenging to give it a boost, says a report. (ET)
- ❖ Chief financial officers of the domestic companies are the most optimistic ones among their Asian peers when it comes to their profit growth outlook this year with majority believing that political change will have a significant impact on the economy, says a survey.

## Domestic News

- ❖ Sesa Sterlite which reported marginally better than expected results for the quarter ended March 2014, saw its shares falling by 1.37 per cent to Rs 190.4 on Tuesday as analysts worry over the financial performance of a few segments. As against the Street expectations of revenue of Rs 20,780 crore, it reported net sales of Rs 20,894.4 crore. Net profit came marginally better at Rs 1,621.55 crore as against expectations of Rs 1,590 crore. (BS)
- ❖ Strategic players, as well as global private equity funds, are understood to be keen on acquiring significant stakes in two of GMR Infrastructure's coal-fired projects -- Emco in Maharashtra (generating 600 Mw) and Kamalanga in Odisha (1,050 Mw). (BS)
- ❖ The Supreme Court appointed former Australian High Court judge Michael Hudson McHugh to head the three-member arbitration panel to solve KG-D6 dispute. (BS)
- ❖ The Vishva Kalyan Kamgar Sanghatana, an independent trade union of Bajaj Auto received a set back as local authorities around Bajaj Auto's Chakan facility extended full support to Bajaj Auto in the strike issue. (BS)
- ❖ The Tata group has for the first measured the economic value of the benefits delivered by the innovations showcased at Tata Innovista 2014, a group-wide programme to encourage innovations, and it stands at \$1 billion. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3806	(0.0006)	(0.04)
GBP-USD	1.6825	(0.0002)	(0.01)
USD-JPY	102.35	(0.29)	(0.28)

Bond Markets	Closing	Chg
10-yr bond	9.03	-0.6 bps
Interbank call	8.65	-3.0 bps



## Domestic News (Cont...)

❖ Dabur India, on Tuesday, reported a 17.32% increase in consolidated net profit at Rs 235.29 crore for the January-March 2014 quarter backed by volume growth in key categories like health supplements, digestives, shampoos, toothpastes, foods and home care. (BS)

❖ Tyre major Ceat posted 3.86% decline in consolidated net profit at Rs 62.42 crore for the fourth quarter ended March 31, 2014. (BS)

❖ Central Bureau of Investigation (CBI) has registered a preliminary inquiry in the matter of disinvestment of Laxmi Villas in Udaipur, Rajasthan, during the BJP-led NDA regime. (BS)

❖ Jindal Steel and Power Ltd (JSPL) clocked 28% dip in consolidated net profit of Rs 402.5 crore for the January-March quarter due to higher depreciation and interest as well as lower sales. (BS)

❖ Glenmark Pharmaceuticals said its novel monoclonal antibody for potential treatment of chronic pain is entering human trials. (BS)

❖ Vedanta group firm Sesa Sterlite reported consolidated net profit of Rs 1,621.55 crore for the quarter ended March 31, and net sales of Rs 20,784.62 crore. (BS)

❖ State-run SJVNL said it has signed a preliminary agreement with Druk Green Power Corporation of Bhutan for setting up a 600 MW hydro electric power plant in the neighbouring nation. (BS)

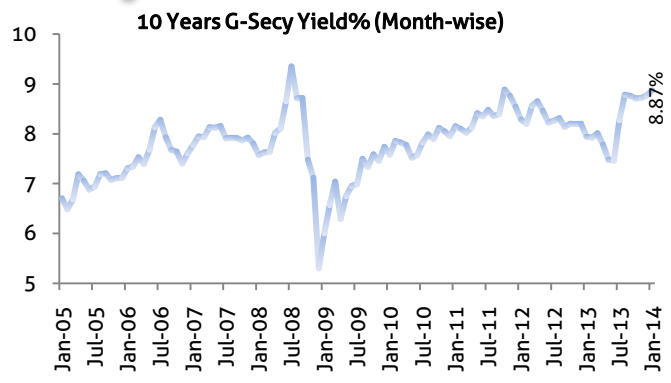
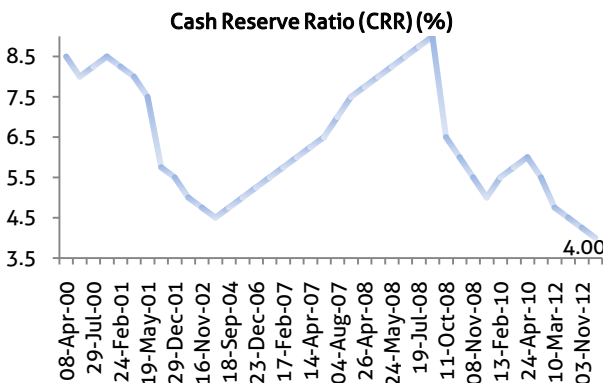
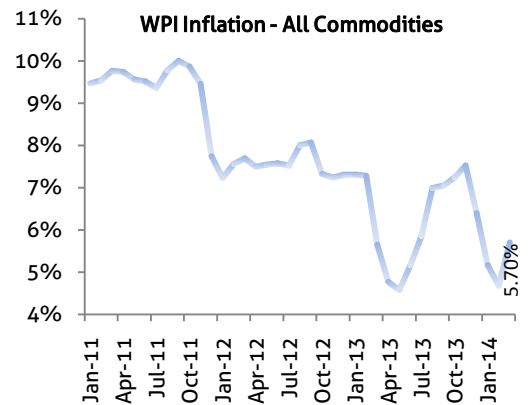
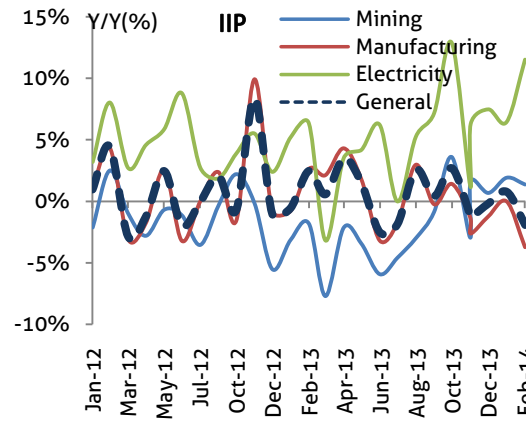
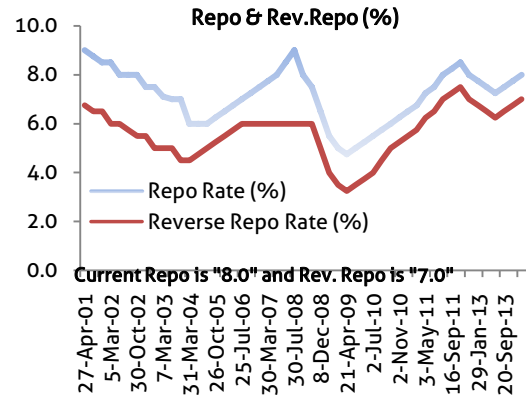
❖ TVS Motor Company reported a profit of Rs 52.12 crore during the fourth quarter as compared to loss of Rs 32.72 crore, during the same period last year. (BS)

❖ Drug firm Sanofi India reported 44.22% decline in net profit at Rs 51.7 crore for the fourth quarter ended March 31, 2014. (BS)

❖ Taking forward its plans to develop mines in Mozambique, state-owned Coal India Ltd (CIL) has invited bids for the third phase of drilling in the African nation. (BS)

❖ IT firm Hexaware Technologies reported a 11.3% decline in net profit at Rs 70.3 crore for the quarter ended March 31, 2014. (BS)

❖ Reliance Industries has asked Oil Ministry to announce a new natural gas price immediately after polling ends on May 12, saying this was necessary to avoid irreparable loss to all parties, including the government. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Apr-14	Unitech Ltd	ADROIT SHARE & STOCK BROKER PVT. LTD.	BUY	15604541	17.4
29-Apr-14	Unitech Ltd	ADROIT SHARE & STOCK BROKER PVT. LTD.	SELL	15450365	17.5
29-Apr-14	India Glycols Ltd	ARKAYA INVESTMENTS	SELL	269432	113.6
29-Apr-14	India Glycols Ltd	ARKAYA INVESTMENTS	BUY	269432	113.1
29-Apr-14	Dr. Datson's Labs Ltd	MODI KARTIK CHHABILDAS	SELL	188765	26.5

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Apr-14	Sterling Hol Res-\$	THOMAS COOK INSURANCE SERVICES INDIA LIMITED	P	6,144,343	98.0
29-Apr-14	Shristi Infra	SUJIT KANORIA	P	600,000	75.0
29-Apr-14	Shristi Infra	OPULENT VENTURE CAPITAL TRUST	S	600,000	75.0
29-Apr-14	Cubical Fin	LUKHRAM GOYAL	P	912,750	16.4
29-Apr-14	ACE Edutrend	CHERRY COSMETICS PRIVATE LIMITED	P	177,050	33.4

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500168	Goodyear India	30-Apr-14	Dividend - Rs.9.00	-
526075	Rekvina Lab	30-Apr-14	Stock Split from Rs. 10/- to Rs.5/-	02-May-14
500870	Castrol India	02-May-14	Final Dividend - Rs.3.50	-
532343	TVS Motor	02-May-14	2nd Interim Dividend - Rs.0.75	05-May-14
500043	Bata India	05-May-14	Dividend - Rs.6.50	-
511288	Gruh Finance	05-May-14	Dividend - Rs.3.00	-
532960	Indiabulls Sec	05-May-14	Interim Dividend - Rs.1.00	06-May-14
504959	Stovec Inds	05-May-14	Final Dividend - Rs.15.00	-
532622	Gateway Distr	06-May-14	2nd Interim Dividend - Rs.-	07-May-14
532424	Godrej Cons	06-May-14	Interim Dividend - Rs.2.25	07-May-14
535789	IBUL HSG FIN	06-May-14	Interim Dividend - Rs.9.00	07-May-14
532832	Indiabulls Real Est	06-May-14	3rd Interim Dividend - Rs.1.00	07-May-14
521248	Kitex Garments	07-May-14	Dividend - Rs.1.00	-
532663	Sasken Comm	07-May-14	Interim Dividend - Rs.3.00	08-May-14
590031	De Nora India	08-May-14	Dividend - Rs.4.00	-
532129	Hexaware Tech	09-May-14	Interim Dividend - Rs.3.00	12-May-14
532191	State Bank Trav	09-May-14	Final Dividend - Rs.-	-
500530	Bosch	12-May-14	Dividend - Rs.55.00	-
523457	LINDEINDIA	12-May-14	Dividend - Rs.1.50	-
500790	Nestle India	15-May-14	Final Dividend - Rs.12.50	-
500790	Nestle India	15-May-14	Interim Dividend - Rs.-	-
500188	Hindustan Zinc	19-May-14	Final Dividend - Rs.1.90	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
28-Apr-14	USD	Pending Home Sales (MoM)			-0.80%
28-Apr-14	USD	Dallas Fed Mfg Business Index			4.9
29-Apr-14	GBP	GDP (YoY)		3.20%	2.70%
29-Apr-14	USD	S&P/CS HPI Composite - 20 (YoY)		13.00%	13.20%
29-Apr-14	EUR	Consumer Confidence		-9	-9.3
29-Apr-14	USD	CB Consumer Confidence		83	82.3
29-Apr-14	GBP	GfK Consumer Confidence		-4	-5
29-Apr-14	JPY	Manufacturing PMI			53.9
29-Apr-14	JPY	Industrial Production (MoM)		0.50%	-2.30%
30-Apr-14	USD	MBA 30-Year Mortgage Rate			4.49%
30-Apr-14	USD	ADP Nonfarm Employment Change		200K	191K
30-Apr-14	USD	GDP (QoQ)		1.30%	2.60%
30-Apr-14	USD	Chicago PMI		56.3	55.9
30-Apr-14	CNY	Chinese Manufacturing PMI			50.3
01-May-14	GBP	Nationwide HPI (YoY)		10.00%	9.50%
01-May-14	GBP	BoE Consumer Credit		0.60B	0.55B
01-May-14	GBP	Manufacturing PMI		55.3	55.3
01-May-14	GBP	Mortgage Lending		1.60B	1.72B
01-May-14	USD	Initial Jobless Claims		320K	329K
01-May-14	USD	Personal Income (MoM)		0.50%	0.30%
01-May-14	USD	Manufacturing PMI			55.4
01-May-14	USD	ISM Manufacturing PMI		54	53.7
01-May-14	JPY	Unemployment Rate		3.60%	3.60%
02-May-14	EUR	Manufacturing PMI		53.3	53.3
02-May-14	EUR	Unemployment Rate		11.90%	11.90%
02-May-14	USD	Nonfarm Payrolls		205K	192K
02-May-14	USD	Unemployment Rate		6.60%	6.70%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Apr-14	INR	Indian M3 Money Supply			13.60%
02-May-14	INR	HSBC Markit Manufacturing PMI			51.3
02-May-14	INR	Indian Bank Loan Growth			13.80%

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