

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5409	2.35	CNX IT	8247	0.88
Sensex	18401	2.25	BANK NIFTY	8905	1.64
DowJones	14841	0.11	S&P CNX 500	4133	2.10
Nasdaq	3620	0.75	CNX FMCG	16059	2.27
Hangseng	21575	(0.60)	CNX REALTY	150	0.40
Shanghai	2093	(0.19)	CNX AUTO	4347	2.30
Nikkei	13391	(0.51)	CNX ENERGY	7340	2.97
Strait Times	3024	(0.47)	CNX PHARMA	6849	1.81
Kospi	1917	0.49	Advances / Declines	BSE	NSE
Taiwan	7940	0.29	Advances	1254	731
FTSE	6483	0.82	Declines	1001	432
CAC	3986	0.65	Unchanged	148	67
DAX	8195	0.45	Total	2403	1230

Nifty Gainers		
Company	Price(Rs)	Chg(%)
SESAGOA	190.85	12.83
HINDALCO	108.00	5.78
HDFC	690.15	5.73
LUPIN	808.50	5.10
KOTAKBANK	636.50	4.92

Nifty Losers		
Company	Price(Rs)	Chg(%)
PNB	425.60	(2.05)
ULTRACEMCO	1435.00	(1.96)
COALINDIA	250.00	(1.54)
INFY	3074.00	(1.36)
SBIN	1482.00	(1.06)

Market Sensor

U.S market finished in positive territory Thursday thanks to a pair of stronger-than-expected economic reports, but lingering worries over Syria put a damper on gains. Dow Jones Industrial Average was up 0.11% or 16.44 points at 14840.95. Nasdaq Composite was up 0.75% or 26.95 points at 3620.30. Standard & Poor's 500 was up 0.20% or 3.21 points at 1638.17.

Indian market on the last day of August expiry witnessed smart recovery in Nifty to end higher. Appreciation in rupee with sharp rally in the Asian and European market led the pullback. Nifty ended the previous trading session with a gain of 2.35% or 124.05 points at 5409.05. On Friday's trading session, FIIs sold net Rs.248.18 Cr in cash market and bought net Rs 1262.67 in derivative segment. Whereas, DII sold net Rs. 75.8 Cr in cash segment.

Coming to today's trade, Nifty to remain volatile as the crucial GDP data would be release today. Crucial support during the day remains at 5350 while resistance is seen at 5470.

Global News

❖ U.S. Treasury Secretary Jacob J. Lew has met or talked with Harvard professor Lawrence Summers, a candidate to become the next Federal Reserve chairman, at least three times this year, according to a calendar released today of Lew's meetings and phone calls. (Bloomberg)

❖ Janet Yellen has won the backing of U.S. labor leaders, including the head of the AFL-CIO, to be the next Federal Reserve chief over Larry Summers because of her support for central bank policies promoting full employment. (Bloomberg)

❖ Federal Reserve Bank of Richmond President Jeffrey Lacker said the future of global central banks will be shaped partly by a debate over the extent of their role as a lender of last resort. (Bloomberg)

❖ The European Central Bank plans to double the share of women in management roles, after a political spat last year over gender diversity almost scuppered the appointment of Yves Mersch to the executive board. (Bloomberg)

❖ Consumer confidence fell for a third straight week to the lowest level in more than four months as Americans' views on the economy, finances and spending soured. (Bloomberg)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
3M India	0.25	0.03	8.64
VGuard Inds	1.24	0.19	6.36
Indraprastha Gas	4.47	0.90	4.96
Muthoot Fin	6.66	1.74	3.83
United Phos	7.54	2.16	3.50

Indian Forex	Closing	Chg	% Chg
USD/INR	67.706	(0.655)	(0.96)
GBP/INR	105.141	(0.887)	(0.84)
EUR/INR	90.030	(1.439)	(1.57)
JPY/INR	69.220	(1.030)	(1.47)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	33250	(880)
Silver (Rs/1kg)	55450	(2899)

Commodities	Price	% Chg.
Crude (US\$/BBL)	107.2	(2.00)
Brent (US\$/BBL)	113.9	(1.67)
Gold (US/oz)	1406.9	(0.21)
Silver (US\$/oz)	23.9	(1.32)
Copper (US\$/MT)	7210.5	(0.35)
Alum (US\$/MT)	1798.0	(1.56)
Zinc (US\$/MT)	1901.0	(1.66)

ADR	Cl. Values	% Chg.
ICICI Bank	26.19	(0.07)
HDFC Bank	27.88	0.03
Infosys	46.21	(0.25)
Sterlite Inds.	5.93	0.37
Dr. Deddy's Labs	33.50	1.23
Wipro	9.07	(0.07)
Tata Motors	22.83	0.53

Economic News

❖The West Bengal government today unveiled an industrial policy that rewards productivity. The state has been divided into four zones where sops will be offered to industrialists based on their performance and ability to generate employment. (BS)

❖A sovereign bond float continues to be among the range of options to address the Current Account Deficit (CAD), Finance Minister P Chidambaram asserted today, even as former Finance Minister Yashwant Sinha asked him to tell Parliament that the centre would not countenance that measure. (BS)

❖The Corporate Affairs Ministry today said it has ordered investigations into the affairs of 125 companies for allegedly defrauding investors by offering high returns in the last three years and the current year. (BS)

❖The proposed food security law will increase the government's subsidy bill but its impact is expected to be felt only in the upcoming fiscal years, says an HSBC report. (BS)

❖Criticising the Food Security Bill, former RBI Governor Bimal Jalan today said the programme is ill-timed and will further aggravate the economic situation by increasing fiscal stress. (BS)

❖BJP leader Rajnath Singh today demanded changes in many clauses in the Land Acquisition Bill. Opening the discussion on the Bill in the Lok Sabha today Singh demanded uniform consent seeking norms for land acquired for government, private and public private partnership projects. (BS)

❖A day ahead of release of the GDP data for the first quarter of the current financial year, an indicator to gauge GDP on monthly basis was launched today. Besides, ZyFin, a company who launched the indicator, estimated GDP growth to be 4.3% in the first quarter of 2013-14. (BS)

❖The steep fall in the value of rupee giving rise to fears of a financial crisis notwithstanding, it has brought cheers to the family members of hundreds of skilled workers stationed in gulf countries. (BS)

Domestic News

❖The Confederation of Real Estate Developers Association of India (Credai), Andhra Pradesh chapter, will rope in a real estate consultancy services firm, to study the various ongoing projects and also the demand and supply position in Hyderabad and Tier II cities of the state. (BS)

❖The exit of Ashok Vemuri, board member and Head of Americas and Manufacturing from Infosys seems to have shaken up the company's 'much prized' succession plan. (BS)

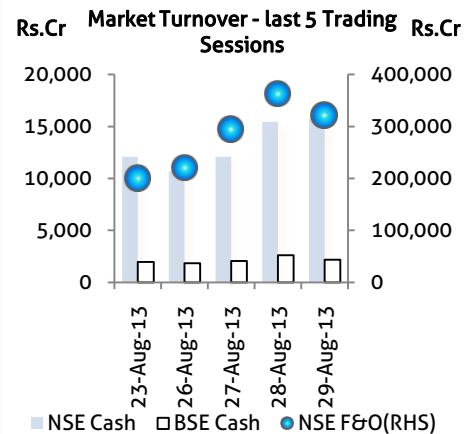
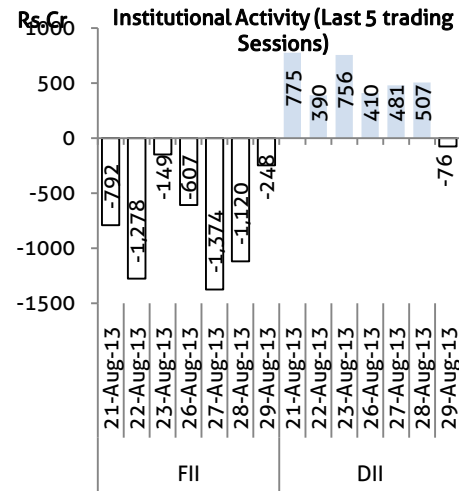
❖State-owned Air India can commence operations of Dreamliners to Japan with the International Civil Aviation Organisation (ICAO) saying it no longer sees any "significant safety concerns" (SSCs) in India's airline operation. (BS)

❖Private sector Kotak Mahindra Bank has opened close to 6,000 bank accounts under its new 'Kotak Junior' saving accounts programme for children and plans to open 50,000 such accounts in future. (BS)

❖Adani Ports and SEZ has sought fresh approval from the government for 1,856 hectares multi-product special economic zone at Gujarat's Mundra, which was denotified in October last year due to non-conformity with SEZ rules. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3250	0.0009	0.07
GBP-USD	1.5520	0.0016	0.01
USD-JPY	98.17	(0.18)	(0.18)

Bond Markets	Closing	Chg
10-yr bond	9.15	40.5 bps
Interbank call	10.23	1 bps



Domestic News (Cont...)

❖ Domestic handset maker Micromax said it aims to become the number one player in India in the smartphone category by Diwali on the back of excellent demand for its Canvas series (BS)

❖ Ranbaxy has outperformed its peers and the broader benchmarks by a wide margin gaining 50% in August, but it is still trading at a 30% discount to its peers (Dr Reddy's, Sun Pharma). This gap, analysts believe, can narrow following timely approval and launch of first-to-files as well as if the company gets the go ahead to start production at two of its affected plants, which are awaiting US FDA clearance (BS)

❖ The Rs 8-crore initial public offer of Tiger Logistics closed and its shares will be listed on the SME (small and medium enterprises) platform of the BSE (BS)

❖ A three-day block closure in Tata Motors Jamshedpur plant here has begun from . (BS)

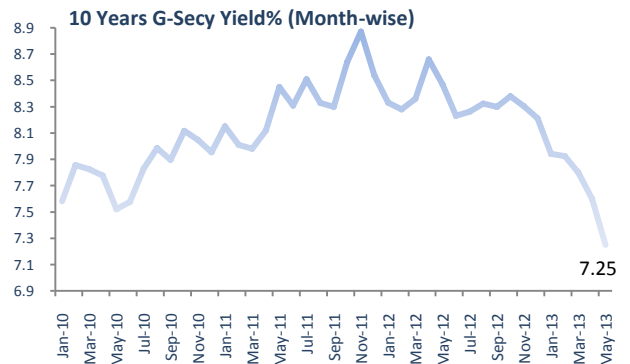
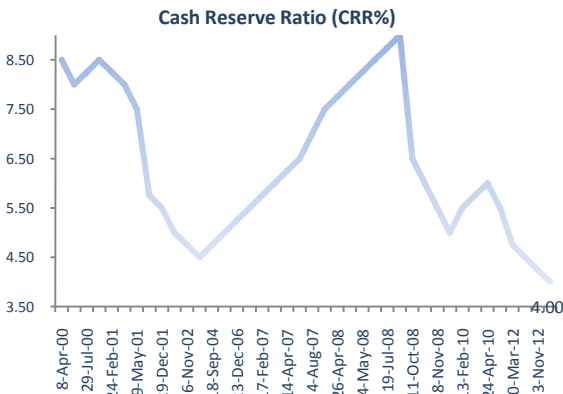
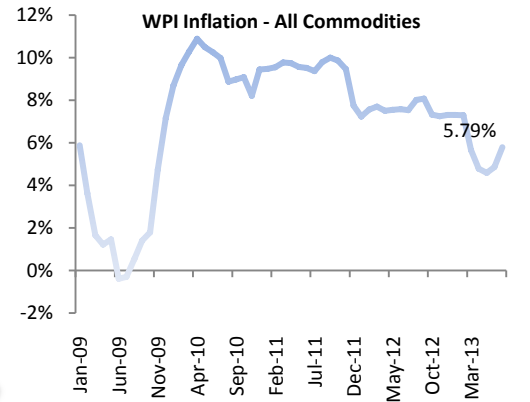
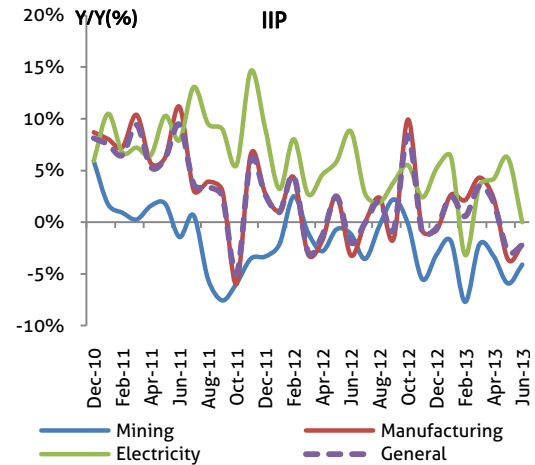
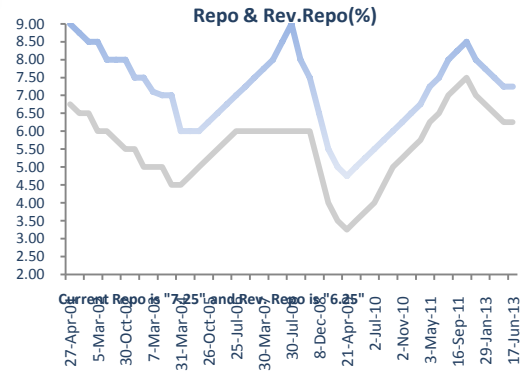
❖ As the prescription market is facing a threat of patent cliff and price regulations, major drug makers such as Ranbaxy, Abbott, GlaxoSmithKline, Cadila Healthcare and Lupin are increasingly foraying into nutraceutical and over-the-counter segment (BS)

❖ As many as 43 Central Public Sector Enterprises (CPSEs) including Air India, MTNL, BSNL and HMT Ltd have been incurring losses for the last three years, Parliament was informed (BS)

❖ Exports of carbon rods to the Panasonic Group battery factories overseas has supported the company's growth last fiscal, despite the steep price increase in raw materials and severe power shortage affecting its domestic business, says Panasonic Carbon India Co Ltd. The company has seen a drop in domestic sales on account of the reduction in a variety of carbon rod used in particular type of batteries. (BS)

❖ While on the one hand efforts are being made by Prime Minister Manmohan Singh and Finance Minister P Chidambaram to push investment in the face of an economic crisis, the Ministry of Environment and Forests (MoEF) led by Jayanti Natarajan is sitting on several projects worth crores of rupees even when clearances have been given by authorized bodies in the ministry. (BS)

❖ Roselabs Bioscience, a part of the Ahmedabad-based Roselabs Group, said it is targeting to launch formulated pre-filled (PFL) syringes in over 100 countries by the end of next year .(BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Aug-13	Aurobindo Pharma Ltd.	MACQUARIE BANK LIMITED	SELL	1940000	180.97
29-Aug-13	Century Textiles Ltd.	M/S MACQUARIE BANK LIMITED	SELL	717000	213.97
29-Aug-13	Jain Irrigation Systems L	MACQUARIE BANK LIMITED	SELL	2284000	52.99
29-Aug-13	Raymond Ltd.	M/S MACQUARIE BANK LIMITED	SELL	388000	187.04
29-Aug-13	Tata Elxsi Limited	SWISS FINANCE CORPORATION (MAURITIUS) LIMITED	BUY	299999	171

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29/08/2013	Jyoti-₹	HYPNOS FUND LIMITED	B	250,000	57.75
29/08/2013	Mazda-₹	SORAB RATTANSHA MODY	B	61,504	99.99
29/08/2013	Rekvina Lab	JIVANA STOCK TRADING PRIVATE LIMITED	B	60,495	74.28
29/08/2013	Pro Fin Capital	ABHAY NARAIN GUPTA	S	40,000	59.5
29/08/2013	EUROFINMART	VINEETA GUPTA	S	25,500	67.64

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500057	Aditya Birla Chem	29-Aug-13	Dividend - Rs.1.00	-
500303	Aditya Birla Nuv	29-Aug-13	Dividend - Rs.6.50	-
530429	Ashish Poly	29-Aug-13	Dividend - Rs.0.16	-
507944	Bajaj Steel	29-Aug-13	Dividend - Rs.3.00	-
500041	Bannari Amman Sug	29-Aug-13	Dividend - Rs.12.50	-
500940	Finolex Inds	29-Aug-13	Dividend - Rs.5.50	-
500150	Foseco India	29-Aug-13	2nd Interim Dividend - Rs.3.00	30-Aug-13
530001	Gujarat Alk	29-Aug-13	Dividend - Rs.3.50	-
502873	HP Cotton	29-Aug-13	Dividend - Rs.1.00	-
500116	IDBI Bank	29-Aug-13	Dividend - Rs.3.50	-
501298	Industrial & Pru	29-Aug-13	Dividend - Rs.55.00	-
501295	Industrial Invest	29-Aug-13	Dividend - Rs.1.50	-
509709	Intl Conveyors	29-Aug-13	Dividend - Rs.0.25	-
532605	JBM Auto	29-Aug-13	Dividend - Rs.2.00	-
532054	KDDL-₹	29-Aug-13	Dividend - Rs.1.00	-
500239	KG Denim	29-Aug-13	Dividend - Rs.0.75	-
501471	Mack Trading	29-Aug-13	Dividend - Rs.1.00	-
533274	Prestige Estates	29-Aug-13	Final Dividend - Rs.1.20	-
524580	Priya-₹	29-Aug-13	Dividend - Rs.1.00	-
522257	Rajoo Engineers-₹	29-Aug-13	Dividend - Rs.0.14	-
526725	Sandesh	29-Aug-13	Final Dividend - Rs.4.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
26-Aug-13	USD	Durable Goods Orders (MoM)		-4.00%	3.90%
26-Aug-13	USD	Dallas Fed Mfg Business Index			4.4
27-Aug-13	USD	CB Consumer Confidence		79	80.3
27-Aug-13	USD	Richmond Manufacturing Index			-11
28-Aug-13	GBP	CBI Distributive Trades Survey		19	17
28-Aug-13	USD	Pending Home Sales (MoM)		0.10%	-0.40%
28-Aug-13	USD	Crude Oil Inventories			-1.428M
29-Aug-13	JPY	Foreign Bonds Buying			-903.8B
29-Aug-13	USD	GDP (QoQ)		2.20%	1.70%
29-Aug-13	USD	Initial Jobless Claims		330K	336K
30-Aug-13	JPY	National CPI (YoY)			0.20%
30-Aug-13	JPY	Tokyo CPI (YoY)			0.40%
30-Aug-13	JPY	Construction Orders (YoY)			21.90%
30-Aug-13	GBP	Nationwide HPI (MoM)		0.60%	0.80%
30-Aug-13	GBP	BoE Consumer Credit		0.60B	0.50B
30-Aug-13	EUR	Consumer Confidence		-17	-17.4
30-Aug-13	EUR	Unemployment Rate		12.10%	12.10%
30-Aug-13	USD	Core PCE Price Index (MoM)		0.20%	0.20%
30-Aug-13	USD	Personal Income (MoM)		0.20%	0.30%
30-Aug-13	USD	Chicago PMI		53	52.3
30-Aug-13	USD	Michigan Consumer Sentiment		80.5	80

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Aug-13	INR	Indian GDP Quarterly (YoY)			4.80%

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