

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|-------|----------------------------|------------|------------|
| Nifty | 9203 | -0.36 | NIFTY IT | 10323.45 | (0.73) |
| Sensex | 29643 | -0.49 | NIFTY BANK | 21666.80 | (0.32) |
| DowJones | 20592 | -0.29 | NIFTY 500 | 8078.85 | (0.35) |
| Nasdaq | 5836 | -0.52 | NIFTY FMCG | 23670.20 | 0.08 |
| Hangseng | 24236 | -0.32 | NIFTY INFRA | 3190.85 | (0.57) |
| Shanghai | 3271 | -0.09 | NIFTY AUTO | 9987.15 | (0.53) |
| Nikkei | 7099 | -1.21 | NIFTY ENERGY | 11914.00 | (0.82) |
| Strait Times | 3169 | -0.54 | NIFTY PHARMA | 10445.20 | 0.87 |
| Kospi | 2131 | 0.10 | Advances / Declines | BSE | NSE |
| Taiwan | 9847 | 0.30 | Advances | 1115 | 590 |
| FTSE | 7349 | -0.22 | Declines | 1793 | 1090 |
| CAC | 5101 | -0.01 | Unchanged | 128 | 61 |
| DAX | 12155 | 0.13 | Total | 3036 | 1741 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| BOSCHLTD | 23600.00 | 3.75 |
| INFRATEL | 367.35 | 3.32 |
| SUNPHARMA | 685.90 | 2.31 |
| EICHERMOT | 26320.00 | 1.70 |
| YESBANK | 1634.00 | 1.19 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| TATASTEEL | 477.55 | (2.16) |
| GAIL | 377.10 | (1.99) |
| WIPRO | 500.00 | (1.99) |
| HINDALCO | 192.55 | (1.99) |
| ZEEL | 529.55 | (1.96) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| HUBTOWN | 26.79 | 3.0 | 9 |
| CUB | 164.00 | 18.6 | 9 |
| ADORWELD | 4.10 | 0.5 | 9 |
| EIDPARRY | 58.09 | 6.8 | 9 |
| NH | 5.07 | 0.6 | 8 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|-------|-------|
| USD/INR | 64.692 | 0.148 | 0.23 |
| GBP/INR | 80.813 | 0.676 | 0.84 |
| EUR/INR | 68.671 | 0.364 | 0.53 |
| JPY/INR | 59.060 | 0.690 | 1.18 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 29111 | 381 |
| Silver (Rs/1kg) | 42330 | 930 |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 53.1 | (0.92) |
| Brent (US\$/BBL) | 55.8 | (0.98) |
| Gold (US/oz) | 1289.3 | 0.78 |
| Silver (US\$/oz) | 18.5 | 0.76 |
| Copper (US\$/MT) | 5685.0 | (1.06) |
| Alum (US\$/MT) | 1907.0 | (0.03) |
| Zinc(US\$/MT) | 2565.0 | (0.58) |

| ADR | Cl. Values | % Chg. |
|------------------|------------|---------|
| ICICI Bank | 11.55 | 3.24 |
| HDFC Bank | 50.75 | (20.97) |
| Infosys | 31.46 | 16.18 |
| Tata Steel Ltd | 14.42 | [0] |
| Dr. Deddy's Labs | 50.45 | 7.73 |
| Wipro | 11.32 | 1.43 |
| Tata Motors | 42.28 | 7.64 |

Market Sensor

US market closed lower on Wednesday as investors assessed the geopolitical landscape. The dollar hit a session low after President Donald Trump told the Wall Street Journal he thought the currency was getting "too strong. Dow Jones Industrial Average was down 0.29% or 59.44 points at 20591.86 Nasdaq Composite was down 0.52% or 30.61 points at 5836.16 Standard & Poor's 500 was down 0.38% or 8.85 points at 2344.93

Indian Equity market fell nearly half a percent amid volatility, in continuation to its prevailing consolidation phase. Geo-political tensions had a negative sentiment in the market. Investors sat tight ahead of start of the corporate earnings season and the Industrial output data for February and retail inflation for March, slated for release after the market hours. IIP contracted -1.2% in February from 2.7% in January while retail inflation rate rose to 3.81% in March from February's 3.65%. Nifty ended the previous day with a decline of 0.36% or 33.55 points at 9203.45. On Wednesday's trading session, FII sold net Rs.580.7 Cr in cash market and bought Rs.1193.81 Cr in derivative segment. Whereas, DII bought net Rs.701.12 Cr in cash segment.

Global News

❖ President Donald Trump said on Wednesday that his administration will not label China a currency manipulator, backing away from a campaign promise, even as he said the U.S. dollar was "getting too strong" and would eventually hurt the economy. (Reuters)

❖ British manufacturers reported the fastest export growth in more than two years in early 2017 and the services sector also recovered to rack up its strongest sales growth since last June's Brexit vote, a business survey showed on Thursday. (Reuters)

❖ Singapore's central bank held policy steady as expected on Thursday, saying a "neutral" stance will be needed for an extended period as data showed the city state's economy contracted in the first quarter. (Reuters)

❖ Inflation almost completely gnawed away the growth in pay of British workers during the three months to February, the clearest evidence yet that households are feeling the strain of rising prices as Brexit negotiations begin. (Reuters)

Economic News

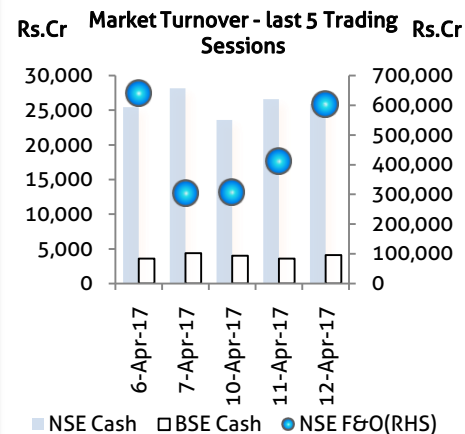
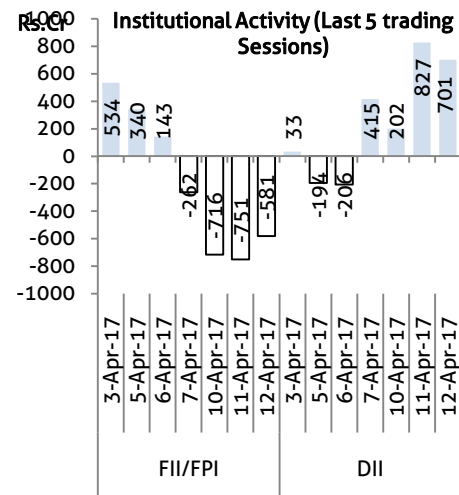
- ❖ India's annual consumer price inflation climbed up to 3.81 percent in March, government data showed on Wednesday. Economists polled by Reuters had expected last month's annual retail inflation to come in at 3.98 percent, compared with 3.65 percent in February.
- ❖ India's industrial production declined 1.2% in February 2017 over February 2016, snapping 3.3% growth recorded in January 2017.
- ❖ India's state-owned fuel retailers plan to implement daily revision of fuel price in five cities from May 1 ahead of a nationwide roll out of the scheme, industry sources said.
- ❖ The Cabinet on Wednesday decided to set up 'Government e-Marketplace' as a national portal for buying goods and services by central and state government entities.
- ❖ In a big boost to 'Make-in-India', the Union Cabinet on Wednesday approved a policy to provide purchase preference to domestic manufacturers in procurements done by state-owned oil and gas companies.
- ❖ The Ministry of Urban Development owes highest dues to the government press, Directorate of Printing (DoP), which also has the Delhi government in its defaulters' list, the Lok Sabha was informed on Wednesday.
- ❖ Hotels and restaurants body HRAWI on Wednesday described as "highly impractical" the government's proposal to fix portion sizes of dishes although the thought behind the concept is noble.
- ❖ No documentary proof is required for getting advance or withdrawal from General Provident Fund (GPF), Union Minister Jitendra Singh said.
- ❖ Deficit of the Department of Posts widened to Rs 11,138.84 crore in February this year on account of wage revision under the 7th Pay Commission.
- ❖ India will launch goods and services tax (GST) as planned on July 1 to boost economic growth and state revenues, a finance ministry official said on Wednesday, despite calls from some businesses for a delay.
- ❖ The government should target a fiscal deficit of three per cent of the GDP in years up to March 31, 2020, the Fiscal Responsibility and Budget Management (FRBM) Committee has recommended.

Domestic News

- ❖ Heritage Foods gets approval from CCI and completes the acquisition process for the dairy business of Reliance Retail Ltd.
- ❖ Arshya Limited enters into a binding term sheet with Ascendas Property Fund Trustee Pte Ltd. to sell six warehouses of the company at its Free Trade and Warehousing zone in Panvel, Navi Mumbai for total gross consideration of Rs 534 crore will be paid in two tranches
- ❖ Cipla wholly-owned subsidiary Cipla Medpro South Africa, completes acquisition of Anmarate (pty) Ltd., South Africa, a deal estimated at around ZAR 26 million.
- ❖ Jubilant Life Sciences board of Directors of Jubilant Pharma Ltd., a wholly-owned subsidiary approved a potential acquisition of a cancer and body imaging company based in the U.S.
- ❖ IOL Chemicals has received EUGMP certification from National Institute of Pharmacy and Nutrition, Hungary for some of its products.

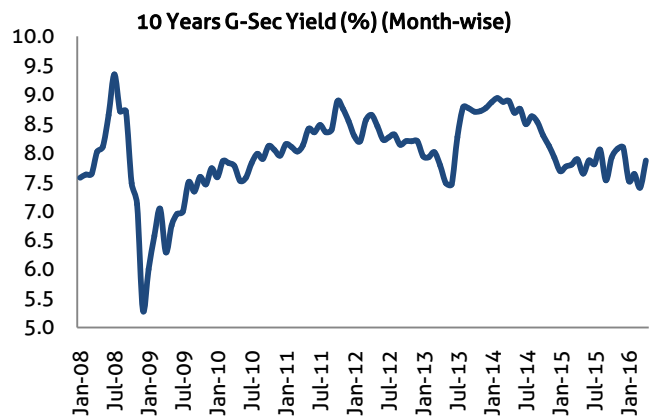
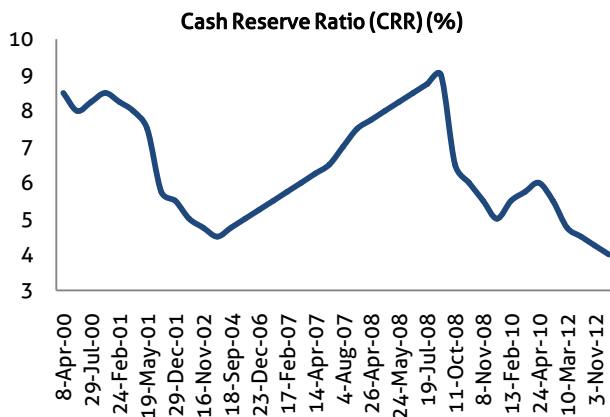
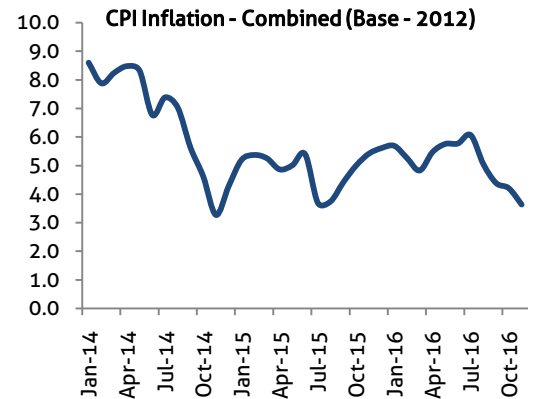
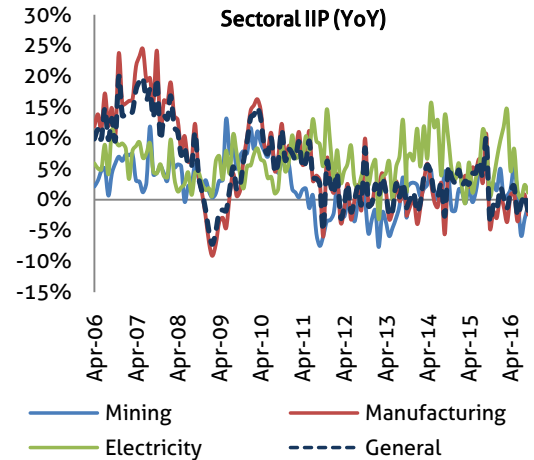
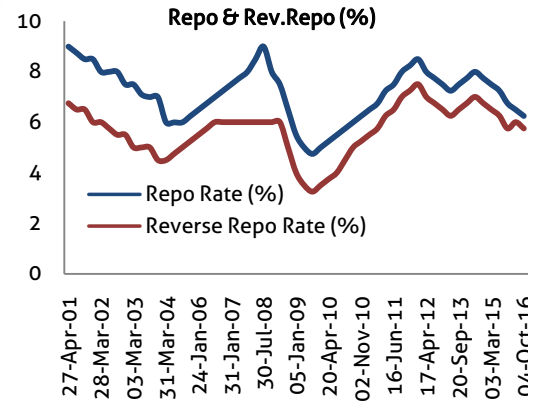
| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.0673 | 0.0009 | 0.00 |
| GBP-USD | 1.2571 | 0.0033 | 0.26 |
| USD-JPY | 108.82 | (0.2200) | (0.20) |

| Bond Markets | Closing | Chg |
|----------------|---------|-----------|
| 10-yr bond | 7.36 | -0.50 bps |
| Interbank call | 5.93 | -3.72 bps |



Domestic News (Cont...)

- ❖ Barak Valley Cements commenced commercial production from the expanded taking the total production capacity of the cement grinding unit to 1,000 tonnes per day
- ❖ NTPC solar tariffs fall to a record low of Rs 3.15 per kWh at auction of 250 MW at Andhra Pradesh solar park.
- ❖ Mahindra Lifespace launches rights issue worth Rs 300 crore and will close on April 29, 2017.
- ❖ ENIL capped its commercial time at 10 minutes per hour and increased ad rates by 5 percent in markets with long-term presence.
- ❖ Reliance Industries expects coal-bed gas sales to third-party users to commence from May.
- ❖ With Rs 5,000 crore worth of BS- III vehicles remaining unsold after the Supreme Court banned them, auto industry body SIAM said an increasingly uncertain business environment will affect investments in the sector.
- ❖ IDFC Alternatives to buy First Solar's 200mw renewable assets for USD 200 million.
- ❖ Tuni Textile board approves sale of un-utilized leasehold property at MIDC Murbad, Thane.
- ❖ Laurel Organics receives approval to manufacture API
- ❖ IFCI reduced benchmark rate to 10.2 percent per annum from 10.75 percent per annum. Also changed its short-term benchmark rate to 8.8 percent per annum from 8.35 percent per annum
- ❖ JSW Steel raised \$500 million by allotment of fixed rate senior unsecured notes which will be listed on the Singapore exchange.
- ❖ Essar Shipping reported a strong operational performance in its cargo handling services during 2016-17. The company's cargo handling services during the period under review grew by 22 percent and fleet capacity utilisation surged to 94 per cent from 80 per cent reported for 2015-16.
- ❖ Central Bank of India approves allotment of 5.59 crore equity shares worth Rs 583 crore to the Government of India on a preferential basis on conversion of perpetual debt instruments.
- ❖ GTL Infra board meeting on April 13 conversion debt into equity under strategic debt restructuring



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|-------------------------|--|----------|-------------|-------|
| 12-Apr-17 | Somany Ceramics Limited | LATINIA LIMITED A/C LATINIA LIMITED | SELL | 380200 | 681.3 |
| 12-Apr-17 | JVL Agro Industries Ltd | ERISKA INVESTMENT FUND LTD | BUY | 4900000 | 22.4 |
| 12-Apr-17 | Stampede Capital Ltd | SHREE BHUVANAKARAM TRADINVEST PVT LTD | BUY | 3847930 | 22.5 |
| 12-Apr-17 | Goa Carbon Ltd | ARKAYA INVESTMENTS | BUY | 252959 | 153.9 |
| 12-Apr-17 | Nucent Finance Limited | ARYAN MINING AND TRADING CORPORATION LTD | SELL | 486495 | 67.0 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|---|----------|-------------|-------|
| 12-Apr-17 | CUB | ARDISIA LIMITED | S | 13,353,000 | 145.3 |
| 12-Apr-17 | EIDPARRY | SUNDARAM BNP PARIBAS MUTUAL FUND SELECT MIDCAP FUND | S | 2,098,296 | 270.0 |
| 12-Apr-17 | HUBTOWN | ANAND RATHI DIRECT INDIA PRIVATE LIMITED | S | 2,000,000 | 99.5 |
| 12-Apr-17 | KOPRAN | ILLUMINATI TRADING PRIVATE LIMITED | S | 268,134 | 97.7 |
| 12-Apr-17 | VIRTUALG | PIYUSH CHANDRASINH SAMPAT | B | 3,000,000 | 5.8 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|-------------|-----------|-----------------------------------|-------------|
| 537905 | AXISFT61DG | 13-Apr-17 | Redemption of Mutual Fund | 17-Apr-17 |
| 537903 | AXISFT61DP | 13-Apr-17 | Redemption of Mutual Fund | 17-Apr-17 |
| 537904 | AXISFT61GP | 13-Apr-17 | Redemption of Mutual Fund | 17-Apr-17 |
| 537906 | AXISFT61HD | 13-Apr-17 | Redemption of Mutual Fund | 17-Apr-17 |
| 537479 | H369F29DQ1 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537618 | H369F29RD2 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537544 | H370F29DD1 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537548 | H370F29RD1 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537514 | H371F29DQ1 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537383 | H371J29DD2 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537387 | H371J29RQ2 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537422 | H372F29DD1 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 537427 | H372F29RQ1 | 13-Apr-17 | Dividend On Mutual Fund | 17-Apr-17 |
| 540386 | ONTIC | 13-Apr-17 | Consolidation of Shares | 17-Apr-17 |
| 534734 | RMICHEM | 18-Apr-17 | Bonus issue 4:1 | 19-Apr-17 |
| 538172 | KTKFMP157D | 19-Apr-17 | Redemption of Mutual Fund | 20-Apr-17 |
| 538170 | KTKFMP157G | 19-Apr-17 | Redemption of Mutual Fund | 20-Apr-17 |
| 538175 | KTKFMP157GD | 19-Apr-17 | Redemption of Mutual Fund | 20-Apr-17 |
| 532466 | OFSS | 19-Apr-17 | Interim Dividend - Rs. - 170.0000 | 20-Apr-17 |
| 500150 | FOSECOIND | 20-Apr-17 | Final Dividend - Rs. - 7.0000 | - |
| 500674 | SANOFI | 25-Apr-17 | Final Dividend - Rs. - 50.0000 | - |
| 532792 | CAIRN | 26-Apr-17 | Amalgamation | 27-Apr-17 |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|--------------------------------------|--------|----------|----------|
| 10-Apr-17 | JPY | Current Account n.s.a. (Feb) | | 2.616T | 0.066T |
| 10-Apr-17 | EUR | Sentix Investor Confidence (Apr) | | 20.2 | 20.7 |
| 10-Apr-17 | USD | CB Employment Trends Index (Mar) | | | 131.4 |
| 11-Apr-17 | GBP | BRC Retail Sales Monitor (YoY) (Mar) | | | -0.40% |
| 11-Apr-17 | JPY | Machine Tool Orders (YoY) | | | 9.10% |
| 11-Apr-17 | GBP | CPI (YoY) (Mar) | | 2.30% | 2.30% |
| 11-Apr-17 | GBP | House Price Index (YoY) | | | 6.20% |
| 11-Apr-17 | GBP | PPI Input (YoY) (Mar) | | 17.20% | 19.10% |
| 11-Apr-17 | GBP | PPI Output (YoY) (Mar) | | 3.30% | 3.70% |
| 11-Apr-17 | GBP | RPI (YoY) (Mar) | | 3.20% | 3.20% |
| 11-Apr-17 | EUR | Industrial Production (YoY) (Feb) | | 2.00% | 0.60% |
| 11-Apr-17 | USD | NFIB Small Business Optimism (Mar) | | | 105.3 |
| 12-Apr-17 | JPY | Core Machinery Orders (YoY) (Feb) | | | -8.20% |
| 12-Apr-17 | JPY | PPI (YoY) (Mar) | | 1.30% | -1.20% |
| 12-Apr-17 | CNY | CPI (YoY) (Mar) | | 1.00% | 0.80% |
| 12-Apr-17 | CNY | PPI (YoY) (Mar) | | 7.60% | 7.80% |
| 12-Apr-17 | GBP | Claimant Count Change (Mar) | | | -11.3K |
| 12-Apr-17 | GBP | Unemployment Rate (Feb) | | 4.70% | 4.70% |
| 12-Apr-17 | USD | MBA 30-Year Mortgage Rate | | | 4.34% |
| 12-Apr-17 | USD | Export Price Index (MoM) (Mar) | | 0.10% | 0.30% |
| 12-Apr-17 | USD | Import Price Index (MoM) (Mar) | | 0.10% | 0.20% |
| 12-Apr-17 | USD | Federal Budget Balance (Mar) | | | -192.0B |
| 13-Apr-17 | GBP | RICS House Price Balance (Mar) | | 22% | 24% |
| 13-Apr-17 | CNY | Trade Balance (USD) (Mar) | | 10.00B | -9.15B |
| 13-Apr-17 | USD | PPI (MoM) (Mar) | | | 0.30% |
| 13-Apr-17 | GBP | CB Leading Index (MoM) | | | 0.40% |
| 13-Apr-17 | USD | Bloomberg Consumer Confidence | | | 50.2 |
| 13-Apr-17 | USD | Michigan Consumer Sentiment (Apr) | | 95.6 | 96.9 |
| 14-Apr-17 | JPY | Industrial Production (MoM) (Feb) | | | 2.00% |
| 14-Apr-17 | USD | CPI (MoM) (Mar) | | 0.10% | 0.10% |
| 14-Apr-17 | USD | Retail Sales (MoM) (Mar) | | 0.30% | 0.10% |
| 14-Apr-17 | USD | Business Inventories (MoM) (Feb) | | 0.30% | 0.30% |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|-----------------------------------|--------|----------|----------|
| 12-Apr-17 | INR | Industrial Production (YoY) (Feb) | | | 2.70% |
| 12-Apr-17 | INR | CPI (YoY) (Mar) | | | 3.65% |
| 14-Apr-17 | INR | WPI Inflation (YoY) (Mar) | | | 6.55% |
| 14-Apr-17 | INR | Bank Loan Growth | | | 4.40% |
| 14-Apr-17 | INR | Deposit Growth | | | 13.00% |

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