

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	9575	-0.57	NIFTY IT	10170.60	(0.28)
Sensex	31138	-0.49	NIFTY BANK	23542.75	(0.81)
DowJones	21410	0.07	NIFTY 500	8355.10	(0.82)
Nasdaq	6247	-0.29	NIFTY FMCG	26163.85	(0.09)
Hangseng	25888	0.06	NIFTY INFRA	3198.95	(0.64)
Shanghai	3186	0.02	NIFTY AUTO	10637.45	(1.69)
Nikkei	7426	0.32	NIFTY ENERGY	11768.75	(0.36)
Strait Times	3219	0.31	NIFTY PHARMA	9478.15	0.07
Kospi	2392	0.16	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	10504	-0.10	Advances	653	344
FTSE	7447	0.31	Declines	1975	1337
CAC	5296	0.56	Unchanged	129	82
DAX	12771	0.29	Total	2757	1763

Nifty Gainers		
Company	Price(Rs)	Chg(%)
POWERGRID	206.00	1.83
VEDL	237.30	1.30
SUNPHARMA	544.55	1.09
AUOPHARMA	672.90	1.04
WIPRO	257.50	0.96

Nifty Losers		
Company	Price(Rs)	Chg(%)
BANKBARODA	160.75	(2.66)
IOC	384.25	(2.35)
EICHERMOT	27083.00	(2.16)
HEROMOTOCO	3650.55	(2.15)
BOSCHLTD	23800.00	(2.00)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
MAXINDIA	142.88	14.5	10
HCG	3.82	0.4	10
TATAMOTORS	841.00	88.9	9
HIMATSEIDE	28.72	3.2	9
LAURUSLABS	5.72	0.7	9

Indian Forex	Closing	Chg	% Chg
USD/INR	64.537	0.041	0.06
GBP/INR	81.974	0.175	0.21
EUR/INR	72.081	0.008	0.01
JPY/INR	58.010	(0.040)	(0.07)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28777	202
Silver (Rs/1kg)	38630	330

Commodities	Price	% Chg.
Crude (US\$/BBL)	43.4	1.31
Brent (US\$/BBL)	46.0	1.48
Gold (US/oz)	1245.0	(0.54)
Silver (US\$/oz)	16.6	(0.30)
Copper (US\$/MT)	5771.0	0.61
Alum (US\$/MT)	1855.0	(0.91)
Zinc(US\$/MT)	2722.0	0.93

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 mixed on Monday as a rise in the financials sector helped offset losses from large-cap technology stocks. Dow Jones Industrial Average was up 0.07% or 14.79 points at 21409.55 Nasdaq Composite was down 0.29% or 18.10 points at 6247.15 Standard & Poor's 500 was up 0.03% or 0.77 points at 2439.07

Indian Equity market lost over half a percent and closed around the day's low, mainly pressurized by the weak global cue and on profit booking, particularly in auto and banking sector stocks ahead of GST rollout. Nifty ended the previous day with a decline of 0.57% or 55.05 points at 9574.95. On Friday's trading session, FIIs bought net Rs.269.95 Cr in cash market and bought Rs.1069.49 Cr in derivative segment. Whereas, DII sold net Rs.45.78 Cr in cash segment.

## Global News

- ❖ China has launched five pilot zones to promote "green finance" and help pay for a war on pollution that is expected to cost at least 3 trillion yuan (\$440 billion) a year, according to notices published by the central bank on Monday. (Reuters)
- ❖ New orders for key U.S.-made capital goods unexpectedly fell in May and shipments also declined, suggesting a loss of momentum in the manufacturing sector halfway through the second quarter. (Reuters)
- ❖ Economic data points to solid growth in the euro zone in the second quarter and indicates a rebound in global growth after a rough patch, the European Central Bank said in a regular economic bulletin on Thursday. (Reuters)
- ❖ Japan's government on Thursday raised its overall view of the economy for the first time in six months, reflecting a gradual pick-up in private consumption and underscoring its confidence that an export-led recovery is broadening. (Reuters)
- ❖ A China-sponsored, \$20 billion fund is ready to receive investment pitches, the Planning Ministry's foreign affairs secretary, Jorge Arbache, told journalists on Monday. (Reuters)

## Economic News

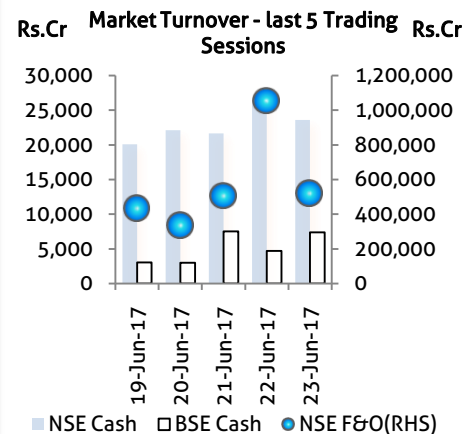
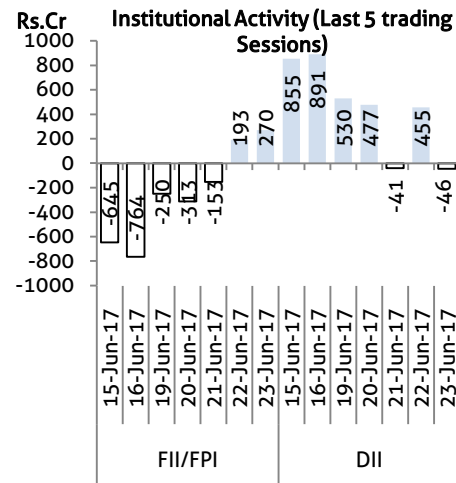
- ❖ US President Donald Trump urged Indian Prime Minister Narendra Modi to do more to relax Indian trade barriers on Monday during talks in which both leaders took great pains to stress the importance of a strong US-Indian relationship.(BS)
- ❖ Several CEOs of top American companies who met with Prime Minister Narendra Modi committed to invest a "very large" amount" in India, one of the participants of the meeting has said. (BS)
- ❖ The commerce ministry is likely to cancel approvals of as many as 62 special economic zones including Cochin Port Trust as the developers have not shown interest in moving forward with the projects. (BS)
- ❖ With just 5 days left for the rollout of the Goods and Services Tax (GST), the government has deferred the implementation of tax deducted at source (TDS) and tax collection at source (TCS) provisions for for two categories of deductors -- government, including local authorities, and e-commerce companies and their suppliers. (BS)
- ❖ Unlike other states across the country where farmers are reeling with farm loan problems, about 71 per cent farmers in Chhattisgarh have repaid the loan. (BS)
- ❖ India has emerged as a business-friendly destination, more so with the upcoming implementation of the landmark Goods and Services Tax (GST) beginning next month, Prime Minister Narendra Modi said on Sunday while meeting with the CEOs of the top 20 American firms. (BS)
- ❖ Union Minister Nirmala Sitharaman on Sunday allayed fears over whether the prices of essential commodities would rise post implementation of Goods and Services Tax, saying no fresh rates would be imposed on those goods which already come under tax ambit.
- ❖ Maharashtra Health Minister Deepak Sawant has said that a public-private partnership (PPP) model in the healthcare sector will help in delivery of efficient services.(BS)
- ❖ The Atomic Energy Regulatory Board (AERB) has cleared the First Pour of Concrete (FPC) to the third and fourth units of Kudankulam Nuclear Power Project (KKNPP), indicating its permission to start construction work on these two units.(BS)

## Domestic News

- ❖ Maruti Suzuki is likely to hit its production target of 2 million vehicles on an annualised basis at least two quarters into fiscal 2019, powered by demand for new models, almost all of which have become best sellers in their respective categories.
- ❖ The strong steps taken by Reserve Bank to resolve NPAs are likely to raise provisioning by a whopping 25 per cent this year as PSU Banks will take up to 60 percent hair cut while resolving these accounts.
- ❖ NOCIL Ltd board of directors has decided to sell 4,71,015 equity shares of Navin Fluorine International Ltd at appropriate market price at BSE and/or NSE.
- ❖ F&O Entrants: Chennai Petroleum, ICICI Prudential Life, Manappuram Finance, Repco Home Finance and SREI Infrastructure will be the new F&O entrants from June 30
- ❖ HDFC Life Insurance Co. Ltd and Max Life Insurance Co. Ltd have carved out a new structure for their proposed merger after the Insurance Regulatory and Development Authority of India (Irda) rejected the original three-step union.

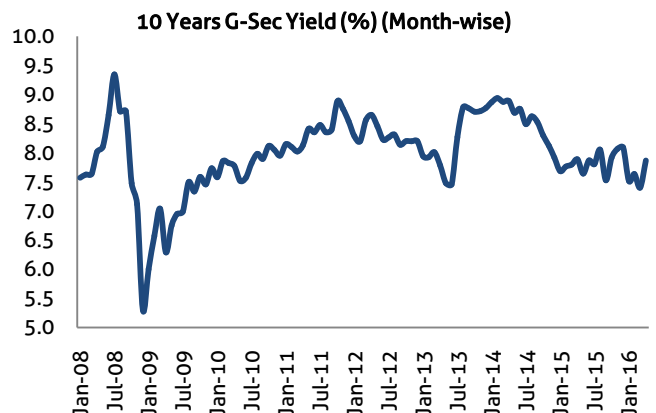
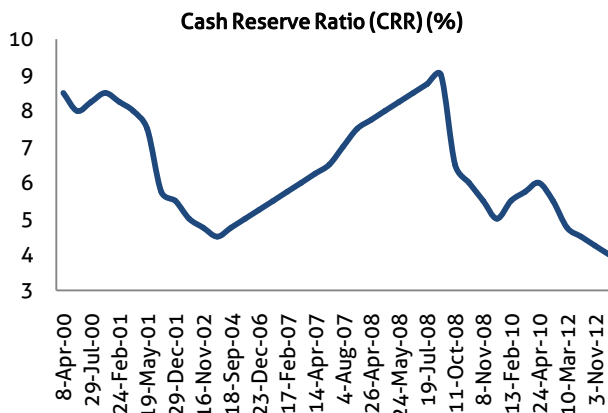
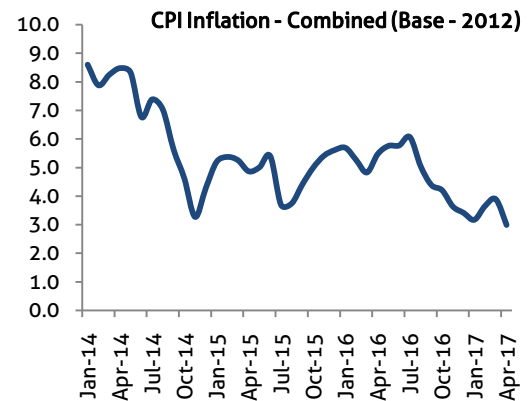
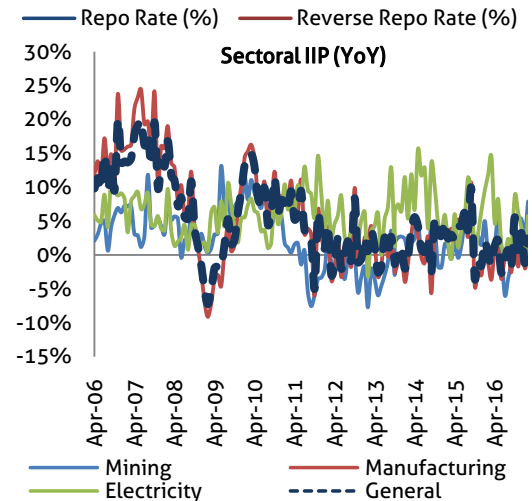
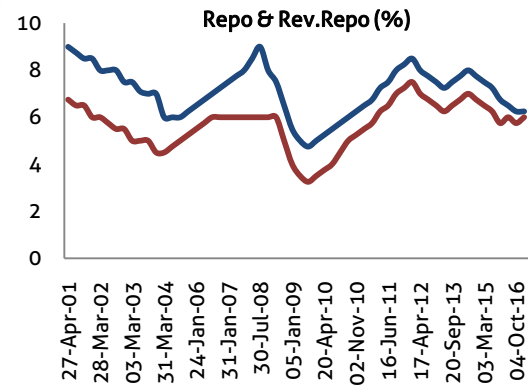
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1256	0.0002	0.02
GBP-USD	1.2720	(0.0004)	(0.03)
USD-JPY	111.90	0.0400	0.04

Bond Markets	Closing	Chg
10-yr bond	6.69	-6.30 bps
Interbank call	6.08	-1.75 bps



## Domestic News (Cont...)

- ❖ Natco Pharma gets U.S. FDA nod for Azacitidine Powder.
- ❖ CEAT board approves investment of Rs 7 crore in Tyresmore Online Pvt. Ltd. in one or more tranches.
- ❖ Greaves Cotton liquidated a step-down subsidiary of the company called Greaves Cotton Middle East.
- ❖ Pioneer Distilleries gets subsidy worth Rs 120 crore from Government of Maharashtra.
- ❖ Grasim fixes July 20, 2017 for the demerger of the financial services business of Grasim to Aditya Birla Capital Ltd. Grasim shareholders to get 7 shares of ABCL for every 5 Grasim shares.
- ❖ Uniply Industries to explore business opportunities like civil construction works for residential and commercial complexes and real estate developers and contractors.
- ❖ Faced with cash crunch, realty firm Unitech has sold 74-acre land in Gurgaon, Chennai and Hyderabad for Rs 260 crore to boost its cash flow and complete ongoing projects.
- ❖ HPCL has joined the Indian consortium negotiating buying a 49 per cent stake in Russia's Vankor Cluster oil fields in the Arctic region.
- ❖ Reliance Industries will seek shareholder's approval to issue redeemable non-convertible debentures on private placement basis to raise Rs 25,000 crore. The company told the BSE that it will hold its fortieth annual general meeting (AGM) on Friday, July 21, 2017 in Mumbai.
- ❖ Cadila Healthcare board has approved raising up to Rs 18,500 crore through various financial tools, including issue of securities in domestic as well as international markets.
- ❖ HDFC Ltd will seek shareholders' approval at AGM to be held on July 26, 2017 to raise up to Rs 85,000 crore through various debt instruments
- ❖ Sterlite Technologies selected as the master system integrator for Kakinada Smart City Project to design, build and manage the city over a period of six years.
- ❖ New York Attorney General Eric Schneiderman said that Infosys had paid a \$1 million settlement for failing to adequately compensate hundreds of workers, failing to pay applicable taxes and breaking US visa rules.



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
23-Jun-17	Reliance Capital Limited	NATWEST BANK PLC AS TRUSTEE OF THE JUPITER INDIA FUND	BUY	1400000	642.1
23-Jun-17	Jaiprakash Associates Lim	ADROIT SHARE & STOCK BROKER PVT. LTD.	BUY	37635483	17.8
23-Jun-17	IRB InvIT Fund	RELIANCE MUTUAL FUND	BUY	6000000	98.9
23-Jun-17	Indiabulls Real Estate Li	ALPHAGREP COMMODITIES PRIVATE LIMITED	SELL	2669516	199.0
23-Jun-17	Ganesh Housing Corp Ltd	GAUTAM PRAKASH	BUY	465000	113.8

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
23-Jun-17	TATAMOTORS	TATA SONS LIMITED	B	83,537,697	452.8
23-Jun-17	MAXINDIA	XENOK LIMITED	S	13,000,000	155.0
23-Jun-17	HIMATSEIDE	BIHAR MERCANTILE UNION LIMITED	B	2,220,000	350.0
23-Jun-17	IRBINVIT	RELIANCE MUTUAL FUND	B	6,500,000	99.0
23-Jun-17	LAURUSLABS	MORGAN STANLEY INVESTMENT FUNDS INDIAN EQUITY FUND	B	563,543	607.1

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500877	APOLLOTYRE	27-Jun-17	Dividend - Rs. - 3.0000	-
532938	FCH	27-Jun-17	Final Dividend - Rs. - 2.6000	-
517477	ELNET	28-Jun-17	Dividend - Rs. - 1.4000	-
532178	ENGINEERSIN	28-Jun-17	Buy Back of Shares	29-Jun-17
504741	INDIANHUME	28-Jun-17	Final Dividend - Rs. - 2.4000	-
517544	CENTUM	29-Jun-17	Final Dividend - Rs. - 3.0000	-
531346	EASTRED	29-Jun-17	Final Dividend - Rs. - 0.5000	-
532457	GULPOLY	29-Jun-17	Final Dividend - Rs. - 0.3000	-
500180	HDFCBANK	29-Jun-17	Dividend - Rs. - 11.0000	30-Jun-17
531209	NUCLEUS	29-Jun-17	Buy Back of Shares	30-Jun-17
531209	NUCLEUS	29-Jun-17	Final Dividend - Rs. - 5.0000	-
531169	SKPSEC	29-Jun-17	Buy Back of Shares	30-Jun-17
532374	STRTECH	29-Jun-17	Final Dividend - Rs. - 0.7500	-
500182	HEROMOTOCO	30-Jun-17	Final Dividend - Rs. - 30.0000	-
533148	JSWENERGY	30-Jun-17	Dividend - Rs. - 0.5000	-
532301	TATACOFFEE	30-Jun-17	Dividend - Rs. - 1.5000	-
532301	TATACOFFEE	30-Jun-17	Special Dividend - Rs. - 0.2500	-
533221	AHLWEST	03-Jul-17	Final Dividend - Rs. - 1.0000	-
500469	FEDERALBNK	03-Jul-17	Dividend - Rs. - 0.9000	-
532926	JYOTHYLAB	03-Jul-17	Dividend - Rs. - 6.0000	-
532522	PETRONET	03-Jul-17	Bonus issue 1:1	04-Jul-17
523648	PLASTIBLEN	03-Jul-17	Bonus issue 1:1	04-Jul-17

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
26-Jun-17	GBP	BBA Mortgage Approvals			40.8K
26-Jun-17	USD	Durable Goods Orders (MoM) (May)		-0.50%	-0.80%
26-Jun-17	USD	Dallas Fed Mfg Business Index (Jun)			17.2
27-Jun-17	GBP	CBI Distributive Trades Survey (Jun)			2
27-Jun-17	USD	S&P/CS HPI Composite - 20 n.s.a. (YoY) (Apr)		5.90%	5.90%
27-Jun-17	USD	CB Consumer Confidence (Jun)		116.9	117.9
28-Jun-17	USD	MBA 30-Year Mortgage Rate			4.13%
28-Jun-17	USD	Wholesale Inventories (MoM)			-0.50%
28-Jun-17	USD	Pending Home Sales (MoM) (May)		0.60%	-1.30%
29-Jun-17	JPY	Retail Sales (YoY) (May)		2.60%	3.20%
29-Jun-17	GBP	BoE Consumer Credit (May)		1.450B	1.525B
29-Jun-17	GBP	Mortgage Approvals (May)		64.00K	64.65K
29-Jun-17	EUR	Business and Consumer Survey (Jun)		109.5	109.2
29-Jun-17	EUR	Business Climate (Jun)		1	0.9
29-Jun-17	EUR	Consumer Confidence (Jun)		-1	-1.3
29-Jun-17	EUR	Industrial Sentiment (Jun)		3	2.8
29-Jun-17	USD	Core PCE Prices (Q1)			2.10%
29-Jun-17	USD	GDP (QoQ) (Q1)		1.20%	1.20%
29-Jun-17	USD	Real Consumer Spending (Q1)			0.60%
29-Jun-17	USD	Bloomberg Consumer Confidence			49.4
30-Jun-17	GBP	GfK Consumer Confidence (Jun)		-7	-5
30-Jun-17	JPY	Household Spending (YoY) (May)		-0.60%	-1.40%
30-Jun-17	JPY	Jobs/applications ratio (May)		1.48	1.48
30-Jun-17	JPY	National Core CPI (YoY) (May)		0.40%	0.30%
30-Jun-17	JPY	Tokyo Core CPI (YoY) (Jun)		0.20%	0.10%
30-Jun-17	JPY	Unemployment Rate (May)		2.80%	2.80%
30-Jun-17	JPY	Industrial Production (MoM) (May)		-3.20%	4.00%
30-Jun-17	CNY	Manufacturing PMI (Jun)		51	51.2
30-Jun-17	GBP	Current Account (Q1)		-16.3B	-12.1B
30-Jun-17	GBP	GDP (YoY) (Q1)		2.00%	2.00%
30-Jun-17	EUR	CPI (YoY) (Jun)		1.30%	1.40%
30-Jun-17	USD	Personal Income (MoM) (May)		0.30%	0.40%
30-Jun-17	USD	Personal Spending (MoM) (May)		0.20%	0.40%
30-Jun-17	USD	Chicago PMI (Jun)		58	59.4
30-Jun-17	USD	Michigan Consumer Sentiment (Jun)		94.5	94.5

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous



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