

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	10021	0.00	NIFTY IT	10612.30	(1.58)
Sensex	32383	(0.02)	NIFTY BANK	24922.40	1.02
DowJones	21797	0.39	NIFTY 500	8737.10	(0.13)
Nasdaq	6382	(0.63)	NIFTY FMCG	25970.45	(0.49)
Hangseng	26995	(0.50)	NIFTY INFRA	3376.15	(0.44)
Shanghai	3251	0.04	NIFTY AUTO	10919.00	(0.77)
Nikkei	7175	(0.46)	NIFTY ENERGY	12664.30	(1.00)
Strait Times	3323	(0.94)	NIFTY PHARMA	9880.25	(1.56)
Kospi	2414	(1.20)	Advances / Declines	BSE	NSE
Taiwan	10456	(0.50)	Advances	852	463
FTSE	7443	(0.12)	Declines	1874	1225
CAC	5187	(0.06)	Unchanged	155	60
DAX	12212	(0.76)	Total	2881	1748

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HDFC	1719.00	5.24
YESBANK	1783.00	4.15
HDFCBANK	1785.10	2.15
ZEEL	540.30	1.82
BPCL	479.85	1.79

Nifty Losers		
Company	Price(Rs)	Chg(%)
DRREDDY	2599.00	(4.00)
TCS	2477.00	(3.09)
TATAMTRDVR	262.40	(2.99)
TATAMOTORS	444.05	(2.90)
BHARTIARTL	414.05	(2.86)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
SOMANYCERA	3.08	0.3	10
MPHASIS	1.05	0.1	8
LAXMIMACH	0.40	0.1	8
TNPL	3.33	0.4	8
STCINDIA	8.71	1.3	7

Indian Forex	Closing	Chg	% Chg
USD/INR	64.122	(0.299)	(0.46)
GBP/INR	84.211	0.380	0.45
EUR/INR	75.208	0.287	0.38
JPY/INR	57.740	0.180	0.31

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28577	209
Silver (Rs/1kg)	38530	530

Commodities	Price	% Chg.
Crude (US\$/BBL)	49.0	0.70
Brent (US\$/BBL)	51.4	1.18
Gold (US/oz)	1265.4	(0.29)
Silver (US\$/oz)	16.6	(0.84)
Copper (US\$/MT)	6325.0	1.39
Alum (US\$/MT)	1923.0	0.58
Zinc(US\$/MT)	2808.5	0.12

ADR	Cl. Values	% Chg.
ICICI Bank	9.50	1.90
HDFC Bank	34.90	1.50
Infosys	15.80	0.60
Tata Steel Ltd	17.50	0.90
Dr. Deddy's Labs	41.80	(0.20)
Wipro	6.10	0.70
Tata Motors	35.30	0.80

Market Sensor

US market closed mixed on Thursday after the technology sector rolled over. Dow Jones Industrial Average was up 0.39% or 85.54 points at 21796.55. Nasdaq Composite was down 0.63% or 40.56 points at 6382.19. Standard & Poor's 500 was down 0.10% or 2.41 points at 2475.42.

Indian Equity market ended almost flat on the F&O expiry day amid volatility, taking a breather after the recent up move. Late selling in blue-chips like Reliance Industries, ITC, Infosys, TCS and Bharti Airtel dragged down the index from the record level to close flat. Nifty ended the previous day at 10020.55. On Thursday's trading session, FIIs bought net Rs.1869.92 Cr in cash market and sold Rs.408.78 Cr in derivative segment. Whereas, DII sold net Rs.660.03 Cr in cash segment.

Global News

❖ Randal Quarles, U.S. President Donald Trump's pick for banking oversight at the Federal Reserve, told lawmakers on Thursday he would ensure more transparency around how the central bank scrutinizes major lenders' preparedness for crisis in its annual stress tests. (Reuters)

❖ A senior Chinese economic official on Thursday indicated that policymakers would be willing to sacrifice some short-term economic growth in order to deal with systemic risks. (Reuters)

❖ Growth in bank lending was unexpectedly weak in June, European Central Bank data showed on Thursday, a potentially worrying sign for policymakers even if a one-off factor may have contributed to the slowdown. (Reuters)

❖ Shipments of key U.S.-made capital goods increased in June for a fifth straight month, suggesting that business spending on equipment helped to boost economic growth in the second quarter. (Reuters)

❖ The number of Americans filing for unemployment benefits rebounded from a three-month low last week, but remained below a level consistent with a tightening labor market. (Reuters)

Economic News

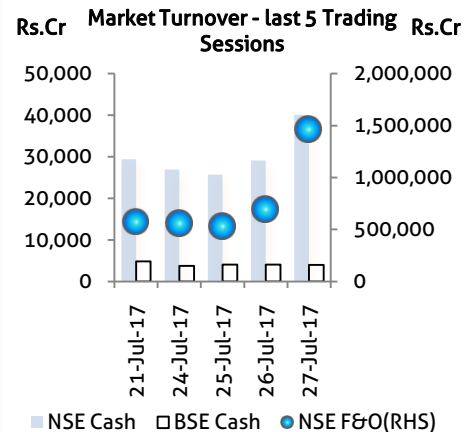
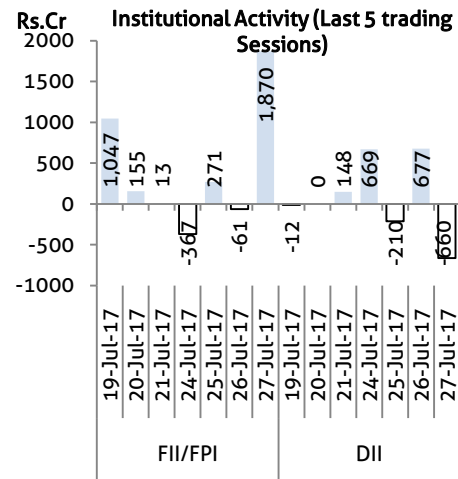
- ❖ Nationwide goods and services tax (GST) was meant to unify the \$2-trillion economy and make it easier for companies to transact across state borders. Nearly a month on, many are finding that doing business is more complicated than ever.
- ❖ The government hopes the gems and jewellery sector to grow 6-7 per cent per annum and has set at target of \$60 billion exports by 2022 from the present \$43 billion, a senior officer said here .
- ❖ India's goods and services tax (GST) has a found mention in the quarterly earnings calls and statements of global chiefs of nearly half a dozen consumer goods MNCs, as they cited the disruption caused by the transition to the new tax regime in a market whose profile has risen steadily within their global operations.
- ❖ The Centre fixed higher rice procurement target at 37.5 mt for 2017-18 marketing season beginning October on hopes of good production.
- ❖ The government is likely to offer only 20 airports in the second round of the bidding for flights under the regional connectivity scheme (RCS), Civil Aviation Secretary R N Choubey said .
- ❖ The government has saved Rs 57,000 crore by weeding out corruption from various schemes through the use of technology, MoS for Finance Arjun Ram Meghwal said .
- ❖ Individuals who violate regulations at airports will now face higher penalties, with state-owned AAI putting in place revised fine amount.
- ❖ The tax authorities will now relay audit reports of corporates and specific information from their I-T returns as also PAN data to the ministry of corporate affairs, as the government plans to crack down harder on shell companies.
- ❖ The government needs to exit infrastructure projects and even look at handing over jails, schools and colleges to the private sector as happens to be the case in countries like Canada and Australia, NITI Aayog Chief Executive Officer (CEO) Amitabh Kant said on Thursday.
- ❖ India has not imposed any restrictions on medical visas for foreign patients but in case of those from Pakistan, a recommendation letter from Advisor to the Prime Minister on Foreign Affairs is required for obtaining a visa, the Lok Sabha was informed on Thursday.

Domestic News

- ❖ Months after an audacious raid to buy into rival London miner Anglo American, Vedanta Resources has initiated talks with south India-based Deccan Gold Mines to acquire a controlling stake.
- ❖ Claris Life sciences deal with Baxter was cleared in the US. Baxter and Claris have agreed to divest two products to settle Federal Trade Commission charges that the deal is anti-competitive.
- ❖ The National Company Law Tribunal approved merger of satellite TV service providers Dish TV and Videocon D2h, paving the way for creation of country's largest direct-to-home service provider.
- ❖ Claris Lifesciences completes sale of its global generic injectables business to Baxter for \$625 million
- ❖ Axis Bank acquired Jasper Infotech-owned FreeCharge for Rs 385 crore, becoming the first Indian lender to take over a digital payments company.

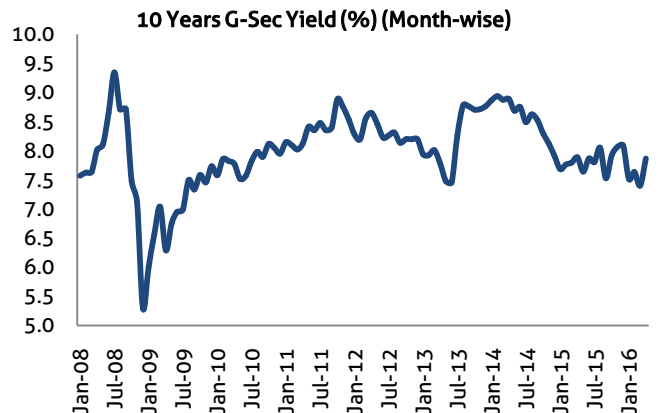
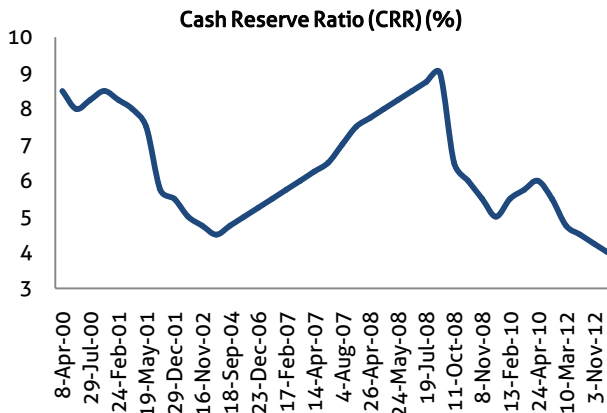
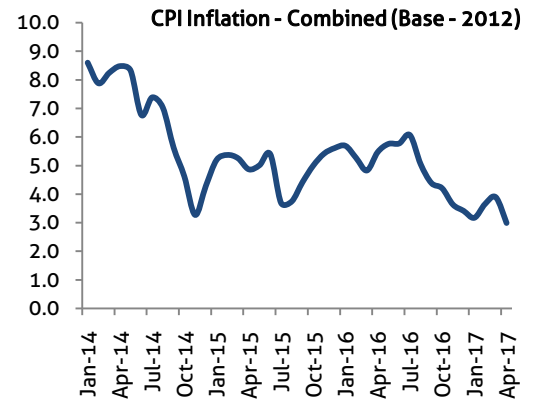
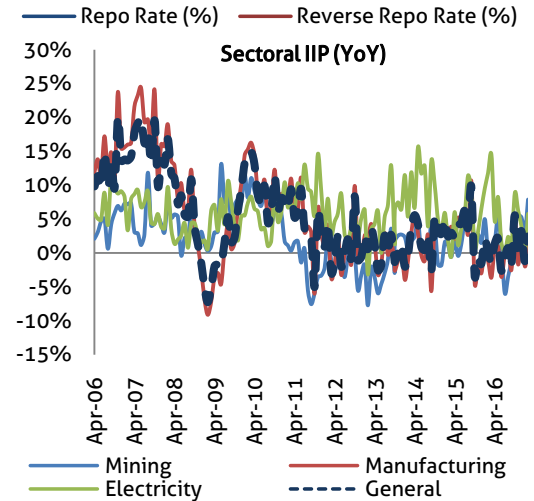
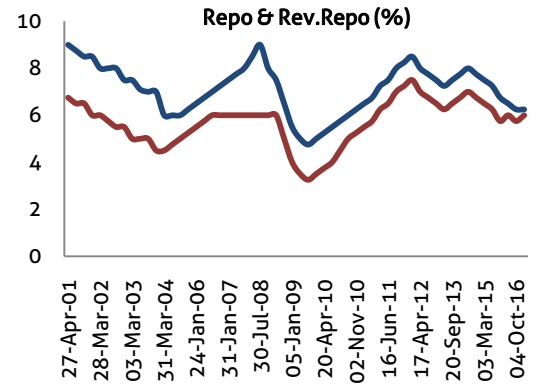
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1256	0.0002	0.02
GBP-USD	1.3084	0.0019	0.15
USD-JPY	111.11	(0.1500)	(0.13)

Bond Markets	Closing	Chg
10-yr bond	6.73	-4.80 bps
Interbank call	6.08	-2.64 bps



Domestic News (Cont...)

- ❖ Global agriculture commodity trader Wilmar International is likely to increase its stake by over 20 per cent in the country's largest sugar refiner Shree Renuka Sugars.
- ❖ Government has raised around Rs 535 cr through disinvestment of its stake in National Fertilizers through an offer of sale.
- ❖ Sun Pharma increased stake in Zenotech Labs to 57.56 percent from 46.85 percent for a cash consideration of Rs 85.50 crore.
- ❖ Nava Bharat Ventures' 300 MW Power Plant of Maamba Collieries has achieved Provisional acceptance under EPC contract.
- ❖ Dr. Reddy's Laboratories signs global licensing agreement with CHD Biosciences for development and commercialisation of company's Phase-III clinical trial candidate for mitigation of surgical site infections.
- ❖ Duke Offshore wins order to support specialized dredging operations with MNC JV Partner at Mumbai Harbour.
- ❖ In yet another development in the long winding Flipkart-Snapdeal merger talks, sources said that Tata Group chairman emeritus Ratan Tata, Temasek, BlackRock and Foxconn all high profile shareholders in the Gurgaon based online marketplace have given in-principal approval to the deal.
- ❖ British liquor giant Diageo on Thursday said it has asked beleaguered businessman Vijay Mallya to return \$40 million paid to him as part of the \$75 million (Rs 515 crore) sweetheart deal for his exit from United Spirits Ltd.
- ❖ Exide Industries, a leading name in lead acid batteries for the automotive segment, is gearing up to ride the next wave of growth with a foray in lithium ion batteries.
- ❖ Mylan Pharmaceuticals Private Limited, a subsidiary of Mylan N V, announced, the launch of Velpatasvir 100 mg/Sofosbuvir 400 mg tablets under the brand name MyHep All in India.
- ❖ Cochin Shipyard will enter the inland vessel building segment on the back of strong growth potential in the next three years.
- ❖ The government has slapped ONGC, Reliance Industries and Royal Dutch Shell with a demand of \$3.9 billion (about Rs 25,487 crore) in dues following an arbitration award in its favour, the state-owned firm said.
- ❖ Shikha Sharma re-appointed as the Managing Director & CEO of Axis Bank for a period of 3 years.



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
27-Jul-17	Indiabulls Real Estate Li	IBREL IBL SCHEME TRUST	SELL	7700000	231.9
27-Jul-17	Bharat Fin. Inc. Ltd.	CIMB BANK BERHAD	SELL	1843000	820.3
27-Jul-17	Infibeam Incorp. Limited	MOHAN LAL SHARMA	SELL	383576	1411.8
27-Jul-17	Jaiprakash Associates Lim	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	SELL	14640149	28.5
27-Jul-17	Religare Enterprises Limi	DILIPKUMAR VISHINDAS LAKHI	BUY	1032378	97.0

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
27-Jul-17	SOMANYCERA	SHRIVATSA SOMANY	S	263,000	775.0
27-Jul-17	ADORFO	NOVASTAR INTERNATIONAL FUND	S	89,712	95.1
27-Jul-17	RDBRL	SOMANI ESTATES PRIVATE LIMITED	B	118,000	61.5
27-Jul-17	DWEKAM	PARAS GULAB NAGDA HUF	S	1,670,000	3.1
27-Jul-17	VAL	OVERSKUD MULTI ASSET MANAGEMENT PRIVATE LIMITED	B	144,000	26.2

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500008	AMARAJABAT	28-Jul-17	Dividend - Rs. - 4.2500	-
500493	BHARATFORG	28-Jul-17	Final Dividend - Rs. - 5.0000	-
500825	BRITANNIA	28-Jul-17	Dividend - Rs. - 22.0000	-
500878	CEATLTD	28-Jul-17	Dividend - Rs. - 11.5000	-
500040	CENTURYTEX	28-Jul-17	Dividend - Rs. - 5.5000	-
538902	DHUNTEAIND	28-Jul-17	Dividend - Rs. - 8.0000	-
523736	DPL	28-Jul-17	Dividend - Rs. - 2.0000	-
532737	EMKAY	28-Jul-17	Dividend - Rs. - 1.0000	-
532835	ICRA	28-Jul-17	Dividend - Rs. - 27.0000	-
523323	KOVAI	28-Jul-17	Dividend - Rs. - 2.5000	-
500252	LAXMIMACH	28-Jul-17	Dividend - Rs. - 35.0000	-
508670	NEAGI	28-Jul-17	Dividend - Rs. - 20.0000	-
508875	NITINCAST	28-Jul-17	Dividend - Rs. - 1.0000	-
590073	WHEELS	28-Jul-17	Final Dividend - Rs. - 8.0000	-
512599	ADANIENT	31-Jul-17	Dividend - Rs. - 0.4000	-
532921	ADANI PORTS	31-Jul-17	Dividend - Rs. - 1.3000	-
532830	ASTRAL	31-Jul-17	Final Dividend - Rs. - 0.3000	-
533336	DHUNINV	31-Jul-17	Dividend - Rs. - 1.5000	-
505200	EICHERMOT	31-Jul-17	Dividend - Rs. - 100.0000	-
505714	GABRIEL	31-Jul-17	Dividend - Rs. - 0.8500	-
532612	INDOCO	31-Jul-17	Final Dividend - Rs. - 1.6000	-
532947	IRB	31-Jul-17	Interim Dividend - Rs. - 2.5000	01-Aug-17

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
24-Jul-17	JPY	Manufacturing PMI (Jul)			52.4
24-Jul-17	EUR	Manufacturing PMI (Jul)		57.2	57.4
24-Jul-17	EUR	Services PMI (Jul)		55.5	55.4
24-Jul-17	USD	Manufacturing PMI (Jul)			52
24-Jul-17	USD	Services PMI (Jul)			54.2
24-Jul-17	USD	Existing Home Sales (Jun)		5.65M	5.62M
25-Jul-17	GBP	CBI Industrial Trends Orders (Jul)			16
25-Jul-17	USD	House Price Index (YoY) (May)			6.80%
25-Jul-17	USD	S&P/CS HPI Composite - 20 n.s.a. (YoY) (May)		5.90%	5.70%
25-Jul-17	USD	CB Consumer Confidence (Jul)		116	118.9
26-Jul-17	GBP	GDP (YoY) (Q2)		1.70%	2.00%
26-Jul-17	USD	MBA 30-Year Mortgage Rate			4.22%
26-Jul-17	USD	New Home Sales (Jun)		619K	610K
26-Jul-17	USD	Fed Interest Rate Decision		1.25%	1.25%
27-Jul-17	USD	Durable Goods Orders (MoM) (Jun)		1.90%	-0.80%
27-Jul-17	USD	Goods Trade Balance (Jun)			-66.30B
27-Jul-17	USD	Wholesale Inventories (MoM)			0.40%
27-Jul-17	USD	Bloomberg Consumer Confidence			47.6
28-Jul-17	GBP	GfK Consumer Confidence (Jul)		-11	-10
28-Jul-17	JPY	Household Spending (YoY) (Jun)		0.60%	-0.10%
28-Jul-17	JPY	National Core CPI (YoY) (Jun)		0.40%	0.40%
28-Jul-17	JPY	Tokyo Core CPI (YoY) (Jul)		0.10%	0.00%
28-Jul-17	JPY	Unemployment Rate (Jun)		3.00%	3.10%
28-Jul-17	EUR	Business and Consumer Survey (Jul)		110.8	111.1
28-Jul-17	EUR	Business Climate (Jul)			1.2
28-Jul-17	EUR	Consumer Confidence (Jul)		-2	-1.7
28-Jul-17	EUR	Services Sentiment (Jul)		13	13.4
28-Jul-17	EUR	Industrial Sentiment (Jul)		4	4.5
28-Jul-17	USD	Employment Cost Index (QoQ) (Q2)		0.60%	0.80%
28-Jul-17	USD	Michigan Consumer Sentiment (Jul)		94.2	93.1
28-Jul-17	USD	GDP (QoQ) (Q2)		2.50%	1.40%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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