

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	9144	0.47	NIFTY IT	10741.25	0.56
Sensex	29531	0.41	NIFTY BANK	21391.15	0.78
DowJones	20659	-0.20	NIFTY 500	7945.30	0.42
Nasdaq	5898	0.38	NIFTY FMCG	23672.50	0.87
Hangseng	24295	-0.40	NIFTY INFRA	3073.05	0.77
Shanghai	3219	-0.68	NIFTY AUTO	9845.75	(0.43)
Nikkei	6949	-0.41	NIFTY ENERGY	11339.20	0.36
Strait Times	3173	-0.37	NIFTY PHARMA	10419.50	(0.74)
Kospi	2163	-0.18	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9850	-0.07	Advances	1188	702
FTSE	7374	0.41	Declines	1666	964
CAC	5069	0.45	Unchanged	236	94
DAX	12203	0.44	Total	3090	1760

Nifty Gainers		
Company	Price(Rs)	Chg(%)
INFRADEL	338.00	6.07
SBIN	288.70	2.34
ICICIBANK	282.30	1.91
HCLTECH	874.00	1.64
HINDALCO	192.50	1.53

Nifty Losers		
Company	Price(Rs)	Chg(%)
HEROMOTOCO	3237.70	(2.68)
SUNPHARMA	686.00	(1.80)
AUROPHARMA	670.00	(1.33)
GRASIM	1056.05	(0.91)
TATAMTRDVR	283.30	(0.82)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
HATHWAY	258.06	26.0	10
GEECEE	31.39	3.2	10
ASTRAL	144.49	14.7	10
CUPID	47.24	4.8	10
GPIL	35.51	3.9	9

Indian Forex	Closing	Chg	% Chg
USD/INR	64.955	(0.134)	(0.21)
GBP/INR	80.480	(1.168)	(1.43)
EUR/INR	70.106	(0.568)	(0.80)
JPY/INR	58.410	(0.670)	(1.13)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28733	(101)
Silver (Rs/1kg)	41840	88

Commodities	Price	% Chg.
Crude (US\$/BBL)	49.5	1.98
Brent (US\$/BBL)	52.3	1.65
Gold (US/oz)	1251.6	0.01
Silver (US\$/oz)	18.2	0.55
Copper (US\$/MT)	5847.0	1.26
Alum (US\$/MT)	1931.0	0.65
Zinc(US\$/MT)	2809.0	1.59

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 mostly higher Wednesday, with energy leading, as investors digested economic data and the start of the United Kingdom's divorce from the European Union. Dow Jones Industrial Average was down 0.20% or 42.18 points at 20659.32 Nasdaq Composite was up 0.38% or 22.41 points at 5897.55 Standard & Poor's 500 was up 0.11% or 2.56 points at 2361.13.

Indian Equity market opened with an uptick and managed to settle with decent gains in a volatile session. Positive global cues, continued FIIs buying and stable oil price lifted the market sentiment. Moreover, expectation of GST Bill implementation from July 1 also boosted the market sentiment. Nifty ended the previous day with a gain of 0.47% or 43.00 points at 9143.80. On Wednesday's trading session, FIIs bought net Rs.460.98 Cr in cash market and bought Rs.878.84 Cr in derivative segment. Whereas, DII bought net Rs.1283.03 Cr in cash segment.

## Global News

❖ Wall Street has tempered its expectations for sweeping U.S. tax cuts in the wake of President Donald Trump's stinging healthcare defeat, a move that could push investors to embrace cheaper global stocks after the heady U.S. rally of recent months. (Reuters)

❖ U.S. Transportation Secretary Elaine Chao said the Trump administration would unveil a \$1 trillion infrastructure plan later this year, but she did not offer details of funding for projects. (Reuters)

❖ Banks in Britain have tried to reassure their London staff over possible Brexit disruption, including a shift in jobs to continental Europe, as Prime Minister Theresa May triggered formal EU divorce proceedings on Wednesday. (Reuters)

❖ Oil prices dipped on Thursday, ending two days of increases as record U.S. crude inventories outweighed a fall in gasoline stocks and disruptions in Libyan supplies. (Reuters)

❖ Contracts to buy previously owned U.S. homes jumped to a 10-month high in February, pointing to robust demand for housing ahead of the busy spring selling season. (Reuters)

## Economic News

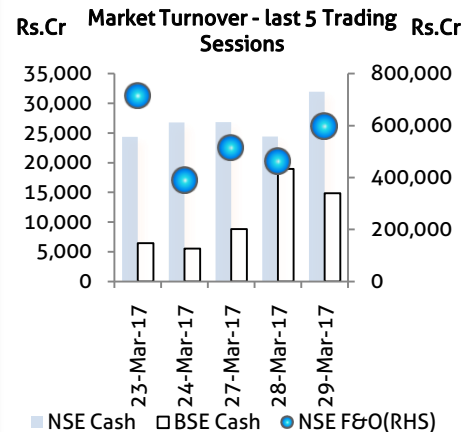
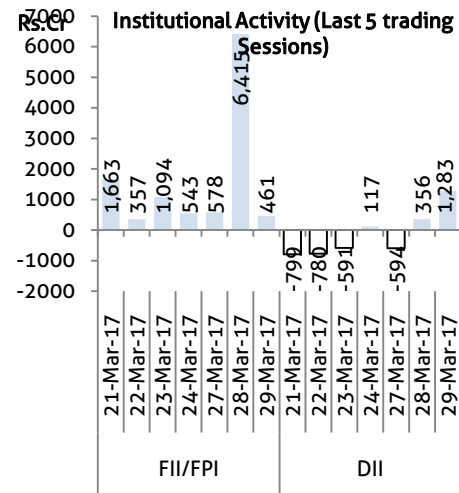
- ❖ The Lok Sabha on Wednesday passed key legislations, putting Asia's third-largest economy on course to launch a nationwide goods and services tax (GST) from July.
- ❖ The government on Wednesday faced a major embarrassment in the Rajya Sabha as five amendments moved by the Opposition to the Finance Bill 2017 were adopted before the House approved the measure.
- ❖ The Rajya Sabha on Wednesday passed the Finance Bill after various amendments presented by Union Finance Minister Arun Jaitley.
- ❖ Responding to Opposition's fears that linking income tax returns and bank accounts with Aadhaar may result in hacking, Finance Minister Arun Jaitley on Wednesday said that the fear of technology being susceptible to misuse does not mean we should not use it.
- ❖ Indian Railways will go for global shopping to acquire high speed locomotives with a Rs 500 crore project to run trains at 200 km per hour on Delhi-Mumbai and Delhi-Kolkata routes.
- ❖ Twenty six states -- including Kerala, Arunachal Pradesh and Tripura -- are now part of the Ujwal Discom Assurance Yojana (UDAY) scheme, meant for the revival of debt stressed Discoms.
- ❖ There is no information available with the Ministry of Housing and Urban Poverty Alleviation about the impact of GST on the prices in the real estate sector, the government said.
- ❖ Direct recruitment in central government jobs has declined by 89 per cent in 2015 in comparison to the year 2013, Lok Sabha was informed.
- ❖ Allaying apprehension of spike in prices of goods and commodities after the roll out of the GST, Finance Minister Arun Jaitley on Wednesday said the tax rates will be kept at the current levels so as not to have any inflationary impact.
- ❖ The Reserve Bank is expected to keep policy rates on hold this year but there are risks tilted towards a hike in 2018, a Goldman Sachs says.

## Domestic News

- ❖ Yes Bank closed QIP issue on March 29, allocate 3.27 crore shares to for Rs 1,500 each raise Rs 4,907 crore from the QIP.
- ❖ Berger Paints' British Paints division of the company has commenced commercial production of its paint and putty plant at Nalbari in Assam.
- ❖ Alkem Laboratories has received establishment inspection report (EIR) from the US health regulator on the closure of its inspection at its API facility at Ankaleshwar in Gujarat.
- ❖ Cabinet approves proposal of restructuring Hindustan Steelworks Construction Ltd. NBCC (India) to pay Rs 35.7 crore to the government for taking over 51 percent stake.
- ❖ Reliance Industries will complete transaction for the sale of its entire 76 percent stake in East African company Gulf Africa Petroleum Corporation to TOTAL SA of France for an undisclosed sum.
- ❖ In a landmark agreement signed with Pune plant workers, Tata Motors has initiated a move to bring 20,000 blue collar factory workers to a wage structure that is performance-linked. Tata Motors will now work towards getting workers from Sanand, Lucknow and Jamshedpur factories to sign a similar agreement.

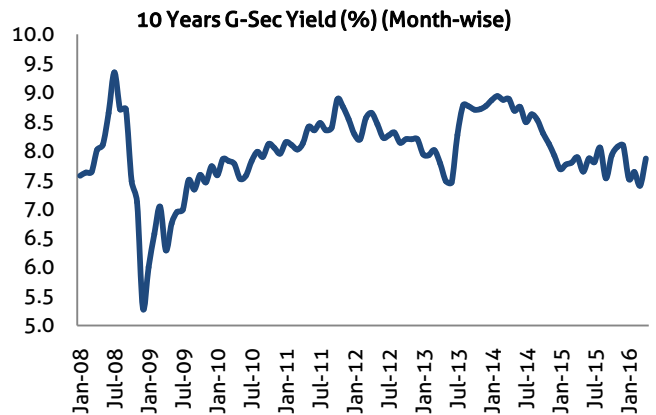
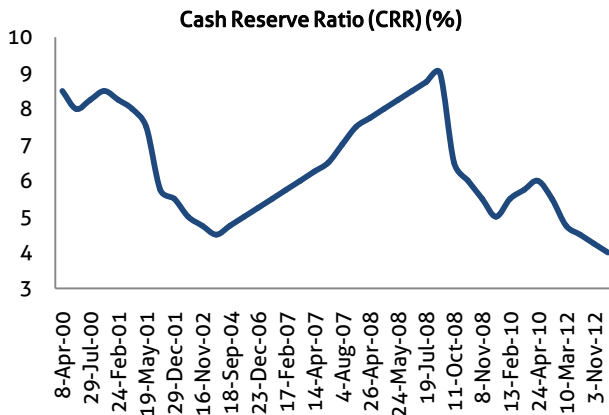
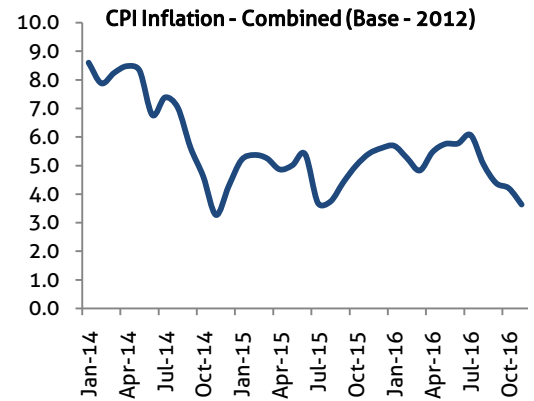
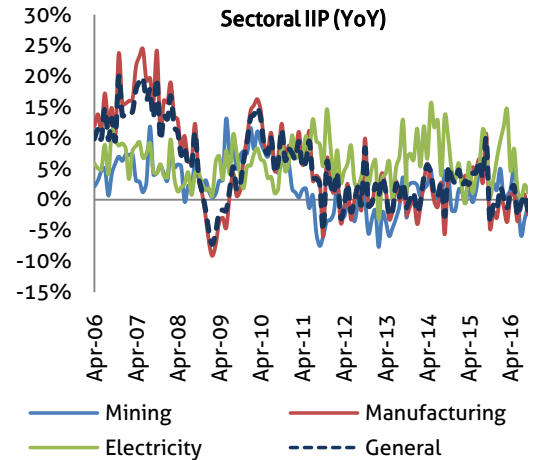
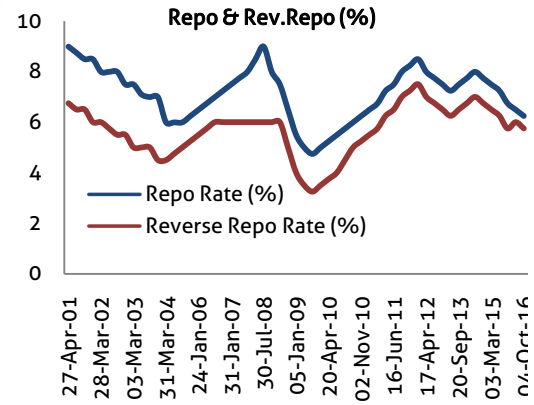
Global Forex	Closing	Chg	% Chg
EUR-USD	1.0746	(0.0019)	(0.00)
GBP-USD	1.2439	0.0003	0.02
USD-JPY	111.33	0.2700	0.24

Bond Markets	Closing	Chg
10-yr bond	7.18	-5.00 bps
Interbank call	5.94	-1.79 bps



## Domestic News (Cont...)

- ❖ Minda Industries successfully raises Rs 300 crore through QIP at Rs 423 per share.
- ❖ TCS joins hands with Siemens to deliver plant solutions for connected digital enterprises.
- ❖ Thermax to acquire 100 percent stake in Barite Investments Sp. Z.o.o, Poland through its wholly-owned subsidiary in Denmark.
- ❖ Huhtamaki PPL commenced commercial production at its newly set up label manufacturing unit in Sikkim and flexible packaging manufacturing unit in Assam.
- ❖ Axis Bank has tied up with Wells Fargo, the third largest American bank by assets, to offer real time remittances from the Indian diaspora to their relatives back home.
- ❖ Kotak Mahindra Bank said reports of it planning to acquire an NBFC are speculative, but hinted it's interested in consolidation drive and termed the pile of stressed assets in the system as a growth area.
- ❖ The government has sold 60.48 crore equity shares worth Rs 1,950 crore in the state-run hydro power generator NHPC Ltd under buyback issue of the company.
- ❖ A consortium of Siemens and Sumitomo Electric Industries has bagged an order of \$520 million from Power Grid Corp for supply of a high-voltage direct current (HVDC) transmission system.
- ❖ Reliance Infrastructure InvIT Fund, which is planning a Rs 3,000-crore issue next month, has become the first to get approval from the National Highway Authority (NHA), according to sources.
- ❖ In its bid to claw back both the wallet share as well as mindshare, Tata Motors launched its first compact sedan in a decade under the Tigor label with petrol and diesel options and with attractive pricing beginning at Rs 4.7 lakh.
- ❖ Larsen & Toubro's construction arm has won orders worth Rs 2,400 crore in domestic and international markets.
- ❖ Ujaas Energy board approve disposal of wholly-owned subsidiary Ujaas Energy HK Ltd. Subsidiary had a negative net worth of Rs 57 lakh.
- ❖ Future Lifestyle Fashions has transferred its Lee Cooper business to a wholly-owned arm Future Speciality Retail Ltd by way of a slump exchange on a going concern basis.



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Mar-17	Torrent Pharma Ltd.	TORRENT PRIVATE LIMITED	BUY	8858864	1440.0
29-Mar-17	IndusInd Bank Ltd.	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	SELL	7138938	1400.2
29-Mar-17	Havells India Limited	ARG FAMILY TRUST	BUY	18862400	450.0
29-Mar-17	Bajaj Corp Limited	BAJAJ RESOURCES LIMITED	BUY	21706250	375.0
29-Mar-17	Nilkamal Limited	HITEN VAMANRAI PAREKH	BUY	1306918	1975.0

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Mar-17	INFRATEL	BHARTI AIRTEL LIMITED	S	209,416,643	325.0
29-Mar-17	ASTRAL	SANDEEP PRAVINBHAI ENGINEER	B	14,171,050	565.0
29-Mar-17	INDUSINDBK	MACQUARIE BANK LIMITED	S	3,532,138	1409.5
29-Mar-17	CUPID	OM PRAKASH GARG	S	4,584,000	332.1
29-Mar-17	HATHWAY	CLSA GLOBAL MARKETS PTE LTD	B	25,448,913	37.3

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
537352	KTKFMP133G	30-Mar-17	Redemption of Mutual Fund	31-Mar-17
537353	KTKFMP133GD	30-Mar-17	Redemption of Mutual Fund	31-Mar-17
537975	KTKFMP150D	30-Mar-17	Redemption of Mutual Fund	31-Mar-17
537977	KTKFMP150DD	30-Mar-17	Redemption of Mutual Fund	31-Mar-17
537974	KTKFMP150G	30-Mar-17	Redemption of Mutual Fund	31-Mar-17
537976	KTKFMP150GD	30-Mar-17	Redemption of Mutual Fund	31-Mar-17
532313	MAHLIFE	30-Mar-17	Right Issue of Equity Shares	31-Mar-17
526299	MPHASIS	30-Mar-17	Buy Back of Shares	31-Mar-17
533398	MUTHOOTFIN	30-Mar-17	Interim Dividend - Rs. - 6.0000	31-Mar-17
532810	PFC	30-Mar-17	Interim Dividend - Rs. - 5.0000	01-Apr-17
538666	SHARDACROP	30-Mar-17	Interim Dividend - Rs. - 2.0000	31-Mar-17
540024	ASHARI	31-Mar-17	Bonus issue 4:1	03-Apr-17
537571	BSLFTPCKDDG	31-Mar-17	Redemption of Mutual Fund	03-Apr-17
537568	BSLFTPCKDRG	31-Mar-17	Redemption of Mutual Fund	03-Apr-17
534816	INFRATEL	31-Mar-17	Interim Dividend - Rs. - 12.0000	03-Apr-17
535263	IPRU2032	31-Mar-17	Temporary Suspension	03-Apr-17
535264	IPRU2033	31-Mar-17	Temporary Suspension	03-Apr-17
535265	IPRU8233	31-Mar-17	Temporary Suspension	03-Apr-17
535266	IPRU8234	31-Mar-17	Temporary Suspension	03-Apr-17
536666	SFCL	31-Mar-17	Amalgamation	03-Apr-17
537723	TFMDUBA	31-Mar-17	Dividend On Mutual Fund	03-Apr-17
537723	TFMDUBA	31-Mar-17	Redemption of Mutual Fund	03-Apr-17

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
27-Mar-17	USD	Dallas Fed Mfg Business Index (Mar)			24.5
28-Mar-17	USD	Wholesale Inventories (MoM)			-0.20%
28-Mar-17	USD	S&P/CS HPI Composite - 20 s.a. (MoM) (Jan)		0.80%	0.90%
28-Mar-17	USD	CB Consumer Confidence (Mar)		113	114.8
29-Mar-17	JPY	Retail Sales (YoY) (Feb)		0.50%	1.00%
29-Mar-17	GBP	BoE Consumer Credit (Feb)		1.350B	1.416B
29-Mar-17	GBP	Mortgage Approvals (Feb)		70.00K	69.93K
29-Mar-17	USD	MBA 30-Year Mortgage Rate			4.46%
29-Mar-17	USD	Pending Home Sales (MoM) (Feb)			-2.80%
30-Mar-17	EUR	Business and Consumer Survey (Mar)		108.1	107.9
30-Mar-17	EUR	Business Climate (Mar)			0.8
30-Mar-17	EUR	Consumer Confidence (Mar)		-6	-5
30-Mar-17	EUR	Industrial Sentiment (Mar)		1	0.8
30-Mar-17	USD	GDP (QoQ) (Q4)		2.00%	1.90%
30-Mar-17	USD	PCE Prices (Q4)			1.90%
30-Mar-17	USD	Real Consumer Spending (Q4)			3.00%
31-Mar-17	GBP	GfK Consumer Confidence (Mar)			-6
31-Mar-17	JPY	Household Spending (YoY) (Feb)		-1.70%	-1.20%
31-Mar-17	JPY	National CPI (YoY) (Feb)			0.40%
31-Mar-17	JPY	Tokyo CPI (YoY) (Mar)			-0.30%
31-Mar-17	JPY	Industrial Production (MoM) (Feb)		1.20%	-0.40%
31-Mar-17	GBP	Business Investment (YoY) (Q4)			-0.90%
31-Mar-17	GBP	Current Account (Q4)		-19.0B	-25.5B
31-Mar-17	GBP	GDP (YoY) (Q4)		2.00%	2.00%
31-Mar-17	EUR	CPI (YoY) (Mar)		1.80%	2.00%
31-Mar-17	USD	Core PCE Price Index (MoM) (Feb)			0.30%
31-Mar-17	USD	Personal Income (MoM) (Feb)		0.40%	0.40%
31-Mar-17	USD	Personal Spending (MoM) (Feb)		0.20%	0.20%
31-Mar-17	USD	Chicago PMI (Mar)		56.8	57.4
31-Mar-17	USD	Michigan Consumer Sentiment (Mar)		97.2	97.6

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
31-Mar-17	INR	Federal Fiscal Deficit (Feb)			5,641.92B
31-Mar-17	INR	Infrastructure Output (YoY) (Feb)			3.40%
31-Mar-17	INR	Bank Loan Growth			4.10%
31-Mar-17	INR	Deposit Growth			12.70%

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