

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	9630	-0.04	NIFTY IT	10199.55	(0.23)
Sensex	31291	0.02	NIFTY BANK	23736.10	0.12
DowJones	21397	-0.06	NIFTY 500	8423.85	(0.23)
Nasdaq	6237	0.04	NIFTY FMCG	26187.70	(0.26)
Hangseng	25771	0.38	NIFTY INFRA	3219.70	(0.55)
Shanghai	3147	-0.03	NIFTY AUTO	10820.75	(0.14)
Nikkei	7426	0.12	NIFTY ENERGY	11811.45	(0.73)
Strait Times	3208	-0.25	NIFTY PHARMA	9471.60	0.16
Kospi	2372	0.08	Advances / Declines	BSE	NSE
Taiwan	10390	-0.09	Advances	1095	621
FTSE	7439	-0.11	Declines	1569	1045
CAC	5282	0.15	Unchanged	154	81
DAX	12794	0.15	Total	2818	1747

Nifty Gainers		
Company	Price(Rs)	Chg(%)
SUNPHARMA	538.55	2.00
AUROPHARMA	665.15	1.53
HDFC	1650.10	1.34
AMBUJACEM	243.50	1.31
ZEEL	511.05	1.28

Nifty Losers		
Company	Price(Rs)	Chg(%)
IOC	393.20	(3.69)
LUPIN	1065.00	(2.74)
HINDALCO	191.30	(2.67)
ONGC	160.55	(2.58)
GAIL	360.65	(2.06)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
HATSUN	2.78	0.3	10
POWERMECH	0.96	0.1	9
IFBIND	1.18	0.1	9
GDL	3.35	0.4	9
OFSS	0.30	0.0	9

Indian Forex	Closing	Chg	% Chg
USD/INR	64.495	(0.108)	(0.17)
GBP/INR	81.799	0.264	0.32
EUR/INR	72.073	0.132	0.18
JPY/INR	58.050	(0.020)	(0.03)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28575	25
Silver (Rs/1kg)	38300	200

Commodities	Price	% Chg.
Crude (US\$/BBL)	42.8	0.92
Brent (US\$/BBL)	45.3	1.27
Gold (US/oz)	1251.7	(0.17)
Silver (US\$/oz)	16.6	0.30
Copper (US\$/MT)	5736.0	1.52
Alum (US\$/MT)	1872.0	0.35
Zinc(US\$/MT)	2697.0	4.56

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 Thursday, with the health care sector posting strong gains. Dow Jones Industrial Average was down 0.06% or 12.74 points at 21397.29 Nasdaq Composite was up 0.04% or 2.73 points at 6236.68 Standard & Poor's 500 was down 0.05% or 1.11 points at 2434.50

Indian Equity market traded volatile for the second day in a row and closed flat in the end. Sebi relaxed entry norms for overseas investors, rationalized 'fit and proper' criteria as also simplified other requirements, they also decided to expand eligible jurisdiction for grant of FPI registration by including countries with diplomatic tie-ups with India which provided the initial rally the previous day but soon paired gains and ended flat. Nifty ended the previous day with a decline of 0.04% or 3.60 points at 9630.00. On Thursday's trading session, FIIs bought net Rs.192.68 Cr in cash market and bought Rs.626.61 Cr in derivative segment. Whereas, DII bought net Rs.455.21 Cr in cash segment.

Global News

❖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)

❖Risks to global growth appeared to have diminished, with markets so far taking policy tightening from the U.S. Federal Reserve in their stride, the European Central Bank said on Wednesday in a regular economic bulletin. (Reuters)

❖Wall Street is fretting that the U.S. auto industry is heading for a downturn, but for thousands of workers at General Motors Co (GM.N) factories in the United States, the hard times are already here. (Reuters)

❖Every 45 seconds or so, a neatly wrapped VanHeusen dress shirt destined for a J C Penney store in the United States drops off a new production line at a factory north of Vietnam's capital. (Reuters)

❖The U.S. Treasury yield curve is flashing warning signs on the economy, pointing to a less optimistic prediction for longer-term economic growth at the same time as Federal Reserve officials are adopting a more aggressive tone on raising interest rates. (Reuters)

Economic News

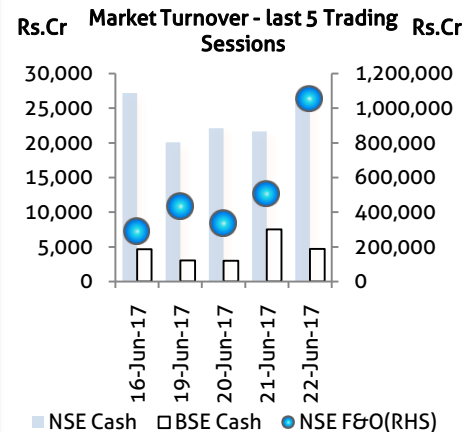
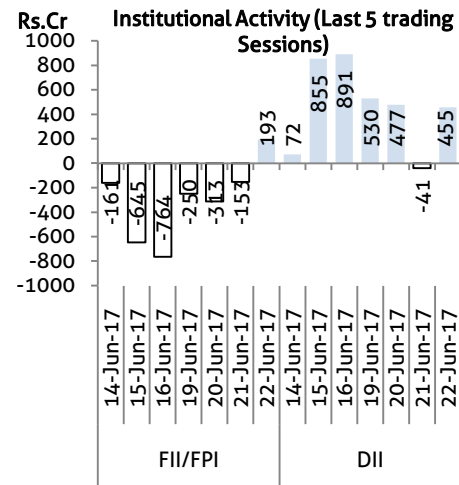
- ❖ The task force on employment data, headed by NITI Aayog Vice-Chairman Arvind Panagariya, is likely to recommend a complete revamp of the country's data collection system.
- ❖ The US has cleared the sale of 22 Guardian drones to India, governmental sources said on Thursday, a deal being termed as a "game changer" for bilateral ties ahead of Prime Minister Narendra Modi's visit to Washington for his maiden meeting with President Donald Trump.
- ❖ India on Thursday said it was in touch with member countries of the Nuclear Suppliers Group over its application for entry into the 48-nation bloc which is at present holding a crucial meeting in the Swiss capital Bern.
- ❖ The government has relaxed conditions for unlisted companies that do not have loans from banks, financial institutions or deposits from public of more than Rs 50 crore on rotation of auditors.
- ❖ Safety audit of the Goods and Services Tax Network (GSTN), an information technology (IT) backbone of the GST, is being carried out by security agencies ahead of its roll-out from next month.
- ❖ Not just Rajiv Gauba as home secretary, but most of the secretaries appointed by the government on Wednesday to head various departments at the Centre will get a term of two years.
- ❖ Reserve Bank governor Urjit Patel on Thursday said the soon-to-be implemented goods and services tax (GST) will not only create a national market but will also broaden the tax base which in turn will lower the overall taxes in the long-term.
- ❖ With more states announcing farm loan waiver schemes, a research report on Thursday said if the trend continues the total write-down could add up to Rs 1.5- 2.3 lakh crore, and banks will bear the brunt.
- ❖ The government is expected to take some action on privatising state-owned airline Air India in next six months, a top government policy adviser told television channel CNBC-TV18 on Thursday.
- ❖ The Centre is facing mounting pressure to raise import duties on edible oils after farmers staged mass protests in key farm states amid a slump in oilseed prices to below government support levels.

Domestic News

- ❖ Jet Airways announced expansion of its codeshare partnership with Air France, KLM Royal Dutch Airlines, and Delta Air Lines. Under the expanded pact, the carriers will expand choice and connectivity options for guests flying between India and Europe, Jet Airways said in a release.
- ❖ Reliance Defence has entered into a pact with Daher Aerospace, France for aerospace equipment manufacturing.
- ❖ Reliance Defence has built and delivered an "Ice-class Panamax bulk carrier" — 'Golden Opal' — to an international customer.
- ❖ Malaysia's healthcare services provider IHH Healthcare Berhad said it is not close to "concluding any negotiations" to buy controlling stake in Fortis Healthcare.
- ❖ State Bank of India has been authorised to refer Essar Steel, Bhushan Steel and Electrosteel to the bankruptcy court raising the possibility that some of these companies could be merged in an effort to return them to health.

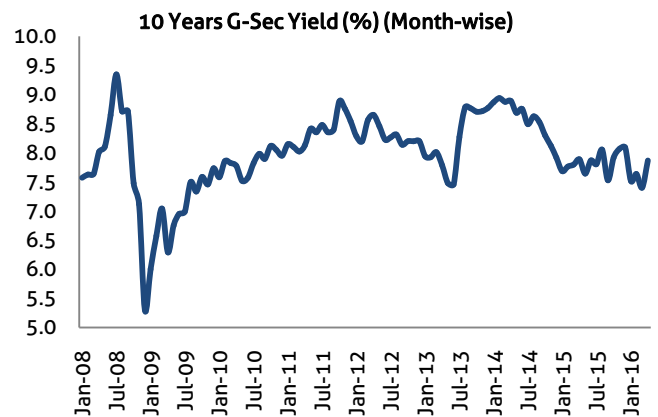
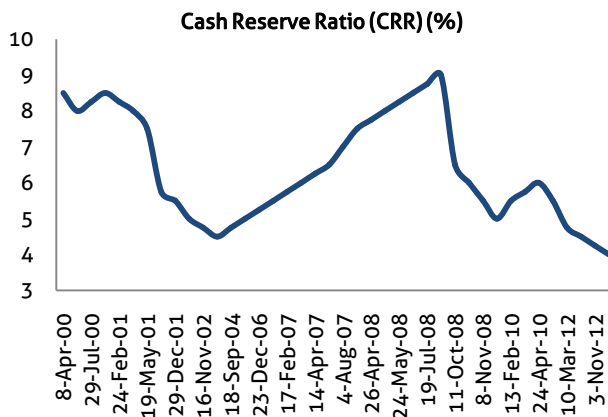
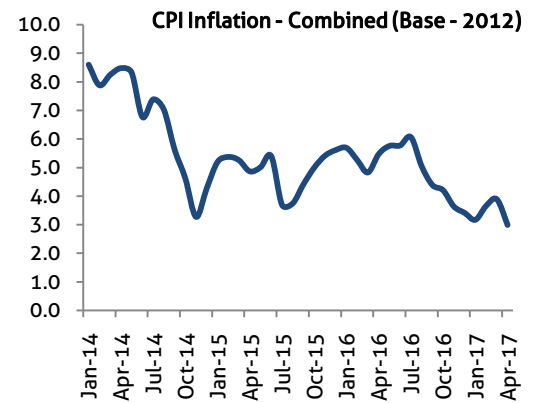
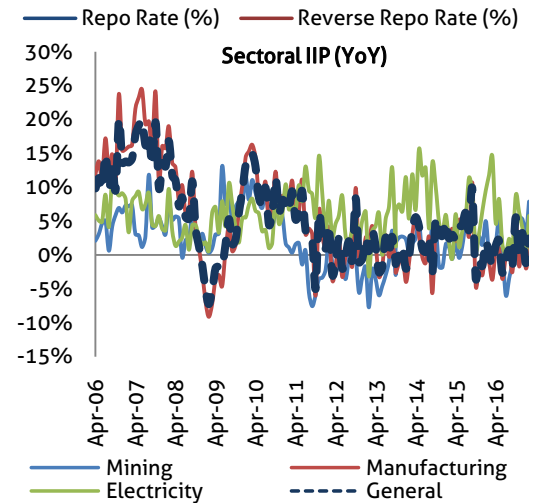
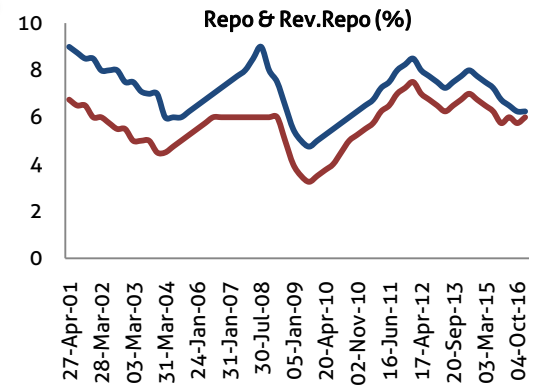
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1256	0.0002	0.02
GBP-USD	1.2693	0.0011	0.09
USD-JPY	111.37	0.0300	0.03

Bond Markets	Closing	Chg
10-yr bond	6.76	3.10 bps
Interbank call	6.10	0.19 bps



Domestic News (Cont...)

- ❖ Reliance Industries and partner BP have withdrawn the gas price-related arbitration against the government, paving the way for the companies to claim the premium price for output from deep-sea fields in which they plan to invest Rs 40,000 crore.
- ❖ Mindtree would look at share buyback, and the proposal would be discussed at the board meeting to be held on June 28.
- ❖ Qess Corp to acquire 46 percent stake in Heptagon Technologies for a total consideration of Rs 9.77 crore and a 51 percent stake in Comtel Pro for a consideration of 1,01,000 Singapore Dollars.
- ❖ Wockhardt and its two subsidiaries, Wockhardt UK Holding and CP Pharmaceuticals, have settled an ongoing commercial litigation with Teva before the High Court in London, UK in relation to a supply contract for a drug named Trisenox.
- ❖ Shriram EPC has won multiple orders under its water management business amounting to Rs 165 crore.
- ❖ EID Parry Nutraceuticals to partner with Synthite Industries for extraction of Phycocyanin.
- ❖ Global private equity investors and international hedge funds have backed Reliance Communications' decision to sell a majority stake in its tower arm, Reliance Infratel, to Canada's Brookfield Group.
- ❖ Indiabulls Real Estate looking to acquire 45 percent stake of U.S. based private equity Farallon Capital in two of its key commercial properties in Lower Parel.
- ❖ Videocon expects Rs 300 crore sales from CCTV, phone accessories and smart homes.
- ❖ Reliance Infrastructure to spin-off transport business.
- ❖ Can Fin Homes board meeting to consider stock split.
- ❖ Alembic Pharmaceuticals has received US health regulator's nod for Amantadine Hydrochloride capsules used to treat symptoms of infection caused by influenza virus.
- ❖ Glenmark Pharmaceuticals said the US health regulator has granted tentative approval for tablets used for treatment of overactive bladder.
- ❖ La Opala settles dispute with workers union at its Madhupur plant. Operations to return to normalcy by July 10.



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
22-Jun-17	Indiabulls Real Estate Li	IBREL IBL SCHEME TRUST	SELL	8000000	203.3
22-Jun-17	Persistent Systems Ltd	FIL INVESTMENTS MAURITIUS LIMITED	SELL	1206186	676.6
22-Jun-17	Jaiprakash Associates Lim	ADROIT SHARE & STOCK BROKER PVT. LTD.	SELL	17781858	17.0
22-Jun-17	Bhushan Steel Limited	IL AND FS FINANCIAL SERVICES LIMITED	SELL	2256000	74.9
22-Jun-17	DFM Foods Limited	STEADVIEW CAPITAL MAURITIUS LIMITED	SELL	118917	1404.7

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
22-Jun-17	IBREALEST	ORIENT GLOBAL CINNAMON CAPITAL LIMITED	B	17,600,000	200.0
22-Jun-17	DFM	STEADVIEW CAPITAL MAURITIUS LIMITED	S	127,000	1400.2
22-Jun-17	GOACARBON	MILLENNIUM STOCK BROKING PVT LTD	S	61,244	260.4
22-Jun-17	PROFINC	LTS INVESTMENT FUND LTD	S	36,000	207.5
22-Jun-17	TERASOFT	ARPIT JAIN HUF	B	73,169	80.5

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
513517	STEELCAS	23-Jun-17	Dividend - Rs. - 0.6000	-
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

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
19-Jun-17	GBP	Rightmove House Price Index (MoM)			1.20%
19-Jun-17	JPY	Trade Balance (May)		76B	482B
20-Jun-17	EUR	Current Account n.s.a. (Apr)			44.8B
20-Jun-17	USD	Current Account (Q1)		-124.0B	-112.4B
21-Jun-17	JPY	All Industries Activity Index (MoM)			-0.60%
21-Jun-17	GBP	Public Sector Net Borrowing (May)		6.50B	9.65B
21-Jun-17	USD	MBA 30-Year Mortgage Rate			4.13%
21-Jun-17	USD	Existing Home Sales (MoM) (May)		-0.70%	-2.30%
22-Jun-17	GBP	CBI Industrial Trends Orders (Jun)		7	9
22-Jun-17	USD	Initial Jobless Claims		240K	237K
22-Jun-17	USD	House Price Index (MoM) (Apr)			0.60%
22-Jun-17	USD	Bloomberg Consumer Confidence			50
22-Jun-17	EUR	Consumer Confidence (Jun)		-3	-3.3
22-Jun-17	USD	KC Fed Manufacturing Index (Jun)			-1
23-Jun-17	JPY	Manufacturing PMI (Jun)			53.1
23-Jun-17	EUR	Manufacturing PMI (Jun)		56.8	57
23-Jun-17	EUR	Markit Composite PMI (Jun)		56.7	56.8
23-Jun-17	USD	Manufacturing PMI (Jun)		53	52.7
23-Jun-17	USD	Services PMI (Jun)		53.8	53.6
23-Jun-17	USD	New Home Sales (MoM) (May)		5.50%	-11.40%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
23-Jun-17	INR	Bank Loan Growth			5.10%
23-Jun-17	INR	Deposit Growth			10.90%

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