

Global Indices	Value	Pts	Chg (%)
SENSEX	27730.21	414.04	1.52
NIFTY	8353.10	128.15	1.56
SGX NIFTY*	8361.50	9.00	0.11
DOW Jones	18119.78	103.83	0.58
S&P 500	2122.85	12.86	0.61
Nasdaq	5153.97	36.97	0.72
FTSE	6825.67	115.22	1.72
CAC	4998.61	183.24	3.81
DAX	11460.50	420.40	3.81
Shanghai Composite*	4462.24	(16.12)	(0.36)
Nikkei*	20758.68	330.49	1.62
Hang Seng*	27175.99	95.14	0.35

*As at 8.30 am

Most Active Call & Put			
Symbol	Strike Price	OI	Chg (%)
NIFTY	8400 CE	5113875	6.14
NIFTY	8200 PE	5442625	17.25

Commodity	Value	Pts	Chg (%)
NYMEX Crude (USD)	59.61	(0.84)	(1.39)
Brent Crude (USD)	63.02	(1.24)	(1.93)
Gold (INR)	26697.00	384.00	1.46
Silver (INR)	36726.00	46.00	0.13
Copper (INR)	360.20	0.20	0.06
Zinc (INR)	128.80	1.20	0.94
Cotton (INR)	15720.00	50.00	0.32

Currency	Value	Pts	Chg (%)
USD/Rupee	63.51	(0.04)	(0.06)
Euro/Rupee	71.62	(0.41)	(0.57)
Pound/Rupee	100.22	(0.28)	(0.28)
Euro/USD	1.14	0.00	0.13
Dollar Index	94.09	0.18	0.19

Volatility	Value	Pts	Chg (%)
CBOE VIX	12.74	(1.22)	(8.74)
India VIX	15.49	0.40	2.65

Interest Rates	Value	Bps change
India 10-Yr Yield	7.73%	2
US 10-Yr Yield	2.38%	13

Trade Statistics	BSE	NSE	F & O
Turnover (INR Crs)	2324.97	14217.69	399412.09
Advance (Nos)	1761 (62%)	1,026 (69%)	NA
Declines (Nos)	967 (34%)	428 (29%)	NA
Unchanged	112 (4%)	36 (2%)	NA

Market Summary

The market ended on a positive note on Monday. The market breadth was positive with almost 2 gainers for every loser on BSE. 1761 shares advanced whereas 976 shares declined and 112 shares were unchanged on BSE.

The S&P BSE Sensex jumped 414 points or 1.5% to settle at 27730. The CNX Nifty rose 128 points or 1.6% to close at 8353. The BSE Mid-Cap index gained 157 points or 1.5% to end at 10644. The BSE Small-Cap index climbed 153 points or 1.4% to settle at 11096.

Top gainers in BSE Sensex were Axis Bank (3.6%), ICICI Bank (3.5%), Infosys (2.8%), HDFC (2.5%) and SBI (2.2%) whereas top losers were Bharti Airtel (2.3%), Reliance (0.5%), Wipro (0.3%), Lupin (0.3%) and ONGC (0.2%).

US markets were positive, Dow Jones Industrial Average closed at 18120, advancing 104 points (0.6%), S&P 500 was up 13 points to close at 2123 points (0.6%) and Nasdaq gained 37 points (0.7%) to 5154.

European markets were also positive, FTSE gained 115 points (1.7%) to close at 6826, CAC surged 183 points (3.8%) to close at 4999 and DAX jumped 420 points (3.8%) to 11461.

Macro News

- The Centre has so far transferred the environment clearance of 19 coal blocks out of approved 29 mines from the earlier allottees to the new successful bidders including JSW Steel, GMR Chhattisgarh Energy, Jaypee Cement and Ambuja Cements among others. The 19 coal blocks are located in Jharkhand, Chhattisgarh, West Bengal, Madhya Pradesh, Maharashtra and Odisha having a combined coal production capacity of over 22 MTPA.
- SoftBank, Bharti Enterprises and Taiwan-based Foxconn Technology Group have formed a JV, SBG Cleantech which will invest around USD 20 bn over 10 years into green energy projects. SoftBank will own a majority stake in the Renewable energy project, while Bharti and Foxconn will take minority stakes, in the venture which will bid for solar and wind energy projects across different states.
- The Centre's attempt at monetising gold may face a road block with the RBI writing to the finance ministry opposing a plan to use gold deposits as bank CRR. RBI has stated that gold as CRR will weaken the effectiveness as monetary policy tool and may expose RBI's reserves to risk from commodity prices.
- Greece's new proposals to European leaders ahead of a crunch summit has offered a ray of hope that a deal to end the country's debt crisis can be struck after five months of deadlock..

Institutional Activity	Cash	
	22-June	June 2015
FII (INR Crs)		
Buy	3526	62983
Sell	2875	69863
Net	651	(6880)
DII (INR Crs)		
Buy	1354	30055
Sell	1448	19821
Net	(94)	10233

FII Derivative Statistics (NSE)				
Particulars	Buy (INR Crs)	Sell (INR Crs)	OI (Nos)	Chg (%)
INDEX FUTURES	2269.96	2426.25	704606	(2.39)
INDEX OPTIONS	13365.48	12609.66	3420970	1.95
STOCK FUTURES	4932.14	4038.16	1992055	0.45
STOCK OPTIONS	1670.14	1769.08	102232	4.74
Total	22237.72	20843.15		

Gainers & Losers	Price	Chg (%)
Gainers (INR)		
Axis Bank	572.00	3.62
ICICI Bank	315.15	3.46
Infosys	1024.40	2.77
HDFC	1268.35	2.50
SBI	265.85	2.19
Losers (INR)		
Bharti Airtel	424.20	(2.25)
Reliance	991.35	(0.52)
Wipro	561.35	(0.31)
Lupin	1811.10	(0.29)
ONGC	318.45	(0.16)

Sectoral Performance	Value	Pts	Chg (%)
S&P BSE Small Cap	11095.50	152.71	1.40
S&P BSE Mid-Cap	10643.69	156.57	1.49
S&P BSE Auto	18746.39	186.15	1.00
S&P BSE BANKEX	21022.20	536.27	2.62
S&P BSE Capital Goods	17243.02	168.11	0.98
S&P BSE FMCG	7626.28	104.53	1.39
S&P BSE Healthcare	16237.84	111.49	0.69
S&P BSE IT	10830.91	197.70	1.86
S&P BSE Metals	9340.47	104.50	1.13
S&P Oil & Gas	9897.22	36.02	0.37

Key News

GVK receives buy-out notice from APTransco

AP Transco has exercised its option to buy out GVK Power & Infrastructure's 217 MW (Phase 1) power plant in Andhra Pradesh. PPA signed by GVK has expired on June 20, 2015 as it had completed its validity period of 18 years.

Blue Dart Express buys majority stake in Blue Dart Aviation

Blue Dart Express has become a majority shareholder in Blue Dart Aviation after purchasing additional 21% stake increasing its shareholding to 70%.

JSW Steel to drastically reduce iron ore imports in FY16

JSW Steel is planning to drastically reduce import of iron ore during FY16 to feed its furnaces in Karnataka, Maharashtra and Tamil Nadu as the domestic iron ore production is set to increase this year. It requires 21 MTPA of iron ore of which it expects to get 17 MT from Karnataka while remaining will be met by imports.

Larsen & Toubro wins new orders worth INR 1507 crs

L&T has won orders worth INR 1507 crs across various business verticals. Its consolidated order book stood at INR 1554 bn in FY15.

HDFC in talks to raise USD 500 Mn

HDFC is in talks with banks to raise USD 500 mn by September 2015. It would be raising the money under the ECB window for housing finance companies that the RBI allowed for funding affordable housing projects.

Reliance Jio gets provisional nod for TV content distribution

RIL subsidiary Reliance Jio Media has received provisional registration from the government to operate as multi service operator at pan-India level in digital cable TV space. With this permit, Reliance Jio will compete with Hathway, IMCL, Siti Cable Network and DEN Networks and can itself distribute its media content on cable television.

International Data

Country	Data	Forecast	Previous
US	FOMC Member Powell Speaks	NA	NA
US	Flash Manufacturing PMI	54.2	54
Germany	Flash Manufacturing PMI	51.5	51.1

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