



HD HOT SPOTS OF THE DAY

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TD

S&P/ASX 200 closed at 5410.6 down 3.1

SPI Futures last at 5399, down 9

Aussie 10 year **bonds** were at 4.07%, 1 point lower yield.

The \$A is at 0.9298us

TOP TWENTY

AMP -2c to \$5.02 on 4.3m shares.

ANZ +7c to \$33.55 on 3.79m shares.

BHP +14c to \$37.88 on 4.87m shares.

BXB -7c to \$9.26 on 2m shares

CBA -10c to \$76.76 on 1.44m shares.

CSL -66c to \$69.70 on 1m shares

FMG +13c to \$5.59 on 17m shares

MQG -71c to \$56.64 on 1.28m shares.

NAB +2c to \$35.20 on 3.64m shares.

ORG steady at \$14.36 on 951,609 shares

QBE -4c to \$12.76 on 2.35m shares.

RIO +55c to \$6.50 on 1.78m shares.

STO +1c to \$13.48 on 2.5m shares

SUN steady at \$12.79 on 2.18m shares.

TLS steady at \$5.04 on 11.85m shares.

WBC -2c to \$34.46 on 2.75m shares.

WDC -2c to \$10.48 on 4m shares.

WES + 7c to \$42.15 on 1m shares.

WOW -15c to \$35.71 on 1m shares.

WPL +6c to \$38.90 on 981,561 shares

MARKET LIFTS INTO THE POSITIVE IN AVRO BEFORE CLOSING DOWN A TOUCH

Our market shrugged off a second day of heavy falls in the US, Europe and UK to briefly climb 6.1 points into the positive in the afternoon, before closing a touch lower.

Sentiment was buoyed by **China's** strong performance on its return from holiday, which saw our miners **lead** the index. Volume was still very low, worth \$3.2 **billion**. The \$A rose about 30 points on last evening to 92.98US c.

***Alumina** rose 2c to \$1.25.5 on 9.3m shares ahead of Alcoa's quarterly report tonight.

*Australian Agriculture rose 5.5c to \$1.29 on 1.39m shares on the FTA deal with Japan.

*Elders is steady at 10.5c on 230,000 shares.

*Bega rose 3c to \$5.03 on 440,000 shares, with the immediate impact is removal of tariffs for dairy, for beef the cuts will be phased in over 15 years.

*Casini Resources rose another 6c to 24.5c on 9.8m shares after rising 16.5c on the 3rd when it announced the **acquisition** of BHP's West Musgrave Project.

*Treasury Wine rose 26c to 43.87 on 7.4m shares on an upbeat report by the new managing director.

*Meanwhile Reuters reports the US has stepped up efforts in its Trans-Pacific Partnership (TPP) pact to put the US and others on a level playing field with Australia. President Obama is set to visit Japan this month.

*Japan's current account rebounded into surplus in February from a record deficit in January, with the 613 **billion** Yen (\$US5.9 bln) surplus the first in five months, the Ministry of Finance reported in Tokyo today, more or less in line with a Bloomberg survey of 29 economists.

*The Bank of Japan retained its monetary base target at between 60 trillion Yen and 70 trillion Yen, concluding a two day policy meeting.

*At 4pm AEST the Nikkei Dow futures was down 150 points to 14,660 points, Shanghai CSI physical was up 36.5 points to 2095.33. The Hang Seng futures was up 181 points to 22,581 points, S&P futures was up 4 points to 1842.10, Nasdaq futures rose 7.5 points to 3506.75, Dow futures was up 31 points to 16,209 points.

Spot **gold** rose \$7 to \$1304. Crude rose 65c to \$101.09.

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