

**HD HOT SPOTS OF THE DAY**

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**TD**

S&P/ASX 200 closed at 5489.1 up 2.5

SPI Futures last at 5472 down 5

Aussie 10 year **bonds** were at 3.96%, 4 points higher yield.

The \$A is at 0.9284us

TOP TWENTY

AMP -2c to \$5.05 on 6.6m shares.

ANZ -13c to \$34.47 on 6.3m shares.

BHP +14c to \$37.75 on 4.14m shares.

BXB -12c to \$9.43 on 3.97m shares

CBA -4c to \$78.90 on 2m shares.

CSL +50c to \$68.43 on 929,535 shares

FMG +5c to \$5.05 on 22.64m shares

MQG -7c to \$57.70 on 971,244 shares.

NAB -21c to \$35.30 on 4.9m shares.

ORG +4c to \$14.90 on 1.8m shares

QBE -23c to \$11.58 on 9.4m shares.

RIO +40c to \$61.70 on 1.7m shares.

STO +20c to \$13.75 on 3.9m shares

SUN -2c to \$13.02 on 2.5m shares.

TLS +6c to \$5.22 on 35.6m shares.

WBC -27c to \$35.12 on 5.3m shares.

WDC +9c to \$10.95 on 6.3m shares.

WES -30c to \$42.71 on 3.4m shares.

WOW -72c to \$37.32 on 3.9m shares.

WPL +9c to \$40.80 on 1.4m shares

#### MARKET MANAGES TO CREEP INTO POSITIVE ON LAST DAY OF MONTH

Our market managed to close up 2.5 points to 5489.1 on the last day of April, after trading to a high of 5507.6 and falling to a low of 5463.6 during the day. Volume was strong at \$4.2 billion. The \$A is at 92.85US c, down about 50 points on last evening, up about 15 from early today.

March quarter sales reports from Woolworths and Wesfarmers - although positive were greeted with share price falls as investors decided to take profits - along with the banks. Investors seem to now be looking at p/e's and reducing their stakes in companies trading on forward p/e's of 14x and more, in line with the US.

\*OceanaGold rose 24c or 9.76% to \$2.70 on 1.6m shares after its positive quarterly report issued last evening - following strong production at Didipio, the AISC was just \$US450 per oz.

\*BT Investment rose 20c to \$6.70 on 288,872 shares.

\*Blackmores rose 80c to \$26.90 on 11,201 after saying it expects to achieve full year profit in line with last year.

\*Ramsay Healthcare rebounded 81c to \$44.81 on 495,999 shares, Cochlear was strongly higher. Orica rose 40c to \$21.87 on 1m shares. (A bit of book squaring may also have been involved).

\*Industrial production in Japan was up a seasonally adjusted 0.3 percent on month in March, the Ministry of Economy, Trade and Industry said on Wednesday. That was shy of forecasts for 0.5 percent following the 2.3 percent contraction in February, RTT News reported.

\*The Bank of Japan left interest rates steady, as expected. China will be on holiday tomorrow and day after, with several countries across the globe also on May 1 holidays - but China's official PMI will be released, expected to show an increase.

At 4pm AEST the Nikkei Dow futures was up 20 points to 14,330 points, Shanghai CSI physical was up 4.23 points to 2024.57, Hang Seng futures was down 416 points to 21,882 points, S&P futures was down 3.9 points to 1867.90, Nasdaq futures was down 14 pointsto 3649.75, Dow futures was down 24 pointsto 16,443 points.

Spot gold was down \$1 to \$1294. Crude futures was down 81cto \$100.47.

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