

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5683	0.73	CNX IT	7219	1.15
Sensex	18836	0.70	BANK NIFTY	11362	1.78
DowJones	14579	0.36	S&P CNX 500	4438	1.00
Nasdaq	3268	0.34	CNX FMCG	15322	0.54
Hangseng	22300	-0.74	CNX REALTY	224	1.31
Shanghai	2241	0.22	CNX AUTO	4225	-0.80
Nikkei	12269	-1.02	CNX ENERGY	7552	0.25
Strait Times	3309	0.03	CNX PHARMA	5953	-0.01
Kospi	1999	-0.29	Advances / Declines	BSE	NSE
Taiwan	7914	-0.05	Advances	1625	908
FTSE	6412	0.38	Declines	1149	567
CAC	3731	0.53	Unchanged	124	103
DAX	7795	0.08	Total	2898	1578

Nifty Gainers		
Company	Price(Rs)	Chg(%)
SIEMENS	550	4.30
GAIL	316	4.03
HINDALCO	91.55	3.80
HCLTECH	800	3.17
AMBUJACEM	174	3.11

Nifty Losers		
Company	Price(Rs)	Chg(%)
TATAMOTORS	269.4	-2.32
HEROMOTOCO	1541	-1.96
BHARTIARTL	291.95	-1.67
MARUTI	1275	-1.41
BAJAJ-AUTO	1777.25	-1.33

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Titan Inds	395.56	5.53	71.47
Sobha Dev	4.68	0.07	68.84
Seshasayee Pap	5.41	0.09	61.56
SYMPHONY	2.07	0.04	55.26
Trent	0.7	0.03	21.92

Indian Forex	Closing	Chg	% Chg
USD/INR	54.3893	-0.1158	-0.21%
GBP/INR	82.3209	0.1694	0.21%
EUR/INR	69.5438	0.3365	0.48%
JPY/INR	57.76	-0.13	-0.23%

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29541	51
Silver (Rs/1kg)	53725	-215

Commodities	Price	% chg.
Crude (US\$/BBL)	97.1	0.41
Brent (US\$/BBL)	109.8	-0.05
Gold (US/oz)	1600.1	-0.39
Silver (US\$/oz)	28.2	-1.98
Copper (US\$/MT)	7582.5	0.17
Alum (US\$/MT)	1881.5	0.75
Zinc(US\$/MT)	1870.5	0.89

ADR	Cl. Values	% Chg.
ICICI Bank	42.90	4.23
HDFC Bank	37.42	1.68
Infosys	53.91	2.24
Sterlite Inds.	6.98	2.20
Dr Reddy's Labs	32.35	0.40
Wipro	10.10	2.96
Tata Motors	24.41	-3.13

Market Sensor

U.S market closed out the first quarter on a high note with the S&P 500 piercing through levels last seen in 2007 to end at a record high near 1,570 and the Dow logging its strongest quarter in 15 years. Dow Jones Industrial Average was up by 0.36% or 52.38 points at 14578.54. Nasdaq Composite was up 0.34% or 11.00 points at 3267.52. Standard & Poor's 500 was up 0.41% or 6.34 points at 1569.19.

Aggressive short covering rally was witnessed on account of last day of March F&O expiry helped Indian market to end with a moderate gains. Nifty ended the previous trading session with a gain of 0.73% or 40.95 points at 5682.55. On last trading session, FIIs bought net Rs. 573.87 Cr in cash market and bought net Rs 724.09 Cr. in derivative segment. Whereas, DII sold net Rs 346.12 Cr in cash segment.

Coming to today's trade, Nifty is expected to trade volatile with positive bias. Crucial support for Nifty is presently placed around 5600-5620, whereas resistance on pullbacks is seen around 5750.

Global News

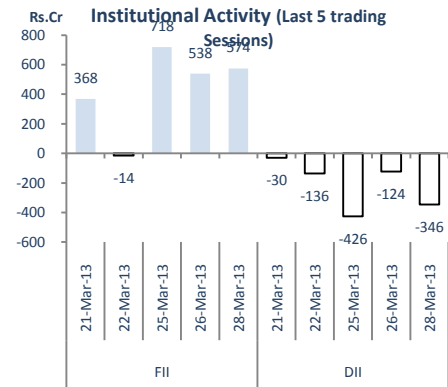
- ❖ North Korea said it has entered a state of war with South Korea a day after putting its forces on standby ready to strike South Korean and U.S. targets.(Bloomberg)
- ❖ Mayor Michael Bloomberg said he'll veto a plan to require all New York City employers with 20 or more workers to give employees paid time off when they get sick.(Bloomberg)
- ❖ European stocks were little changed this week as uncertainty in Cyprus and a political deadlock in Italy overshadowed better-than-estimated U.S. and German economic data.(Bloomberg)
- ❖ The Standard & Poor's 500 Index (SPX)'s record rally probably has another year to go as investors give up their pessimism and buy, according to Laszlo Birinyi, one of the first money managers to tell clients to buy before the bull market began.(Bloomberg)
- ❖ Japan's manufacturers predict a rebound in production this month after the deepest slide since the aftermath of the March 2011 earthquake, with the central bank poised to step up monetary stimulus next week.(Bloomberg)

Economic News

- ❖ The domestic two-wheeler industry is expected to report moderate volume growth of around 4-5 per cent in 2012-13, as demand slowdown as well as base effect catches up with the industry, says a recent ICRA report on the industry. The two wheeler industry, however, has clocked a compounded annual growth rate (CAGR) of 21.8 per cent over the last three years.(BS)
- ❖ To make the toll collection process at the national highways easier and more transparent, the government will roll out RFID-based electronic toll collection across all the toll plazas on national highways through out the country by 2014. (BS)
- ❖ A near term weakening of the rupee against the dollar due to Current Account Deficit (CAD) rising to a record high of 6.7% of gross domestic product (GDP) in the December quarter is seen as a temporary by the market. (BS)
- ❖ India has imposed an anti-dumping duty on the imports of meta phenylene diamine (MPDA), a chemical intermediate, from China. (BS)
- ❖ Travelling in trains is set to become costlier from as the increase in reservation fee and superfast charges announced in the Rail Budget come into effect from April 1. (BS)
- ❖ Giving a major push to infrastructure and energy sector, the government in the past two months has given nod to projects worth Rs 74,000 crore which were stuck for years due to lack of various clearances. (BS)

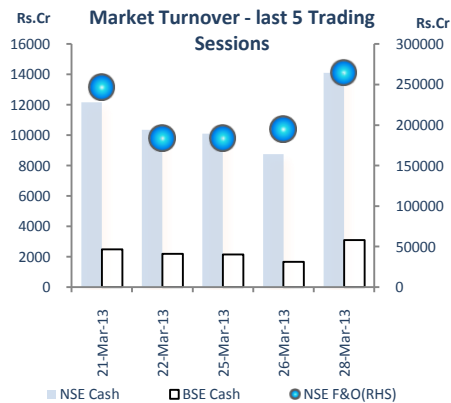
Global Forex	Closing	Chg	% Chg
EUR-USD	1.2776	-0.0042	-0.34%
GBP-USD	1.5190	-0.0015	-0.05%
USD-JPY	93.950	-0.1900	-0.29%

Bond Markets	Closing	Chg
10-yr bond	8.00	1.4 bps
Interbank call	13.72	592 bps



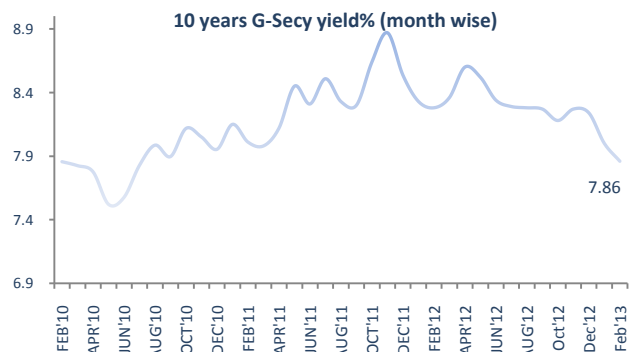
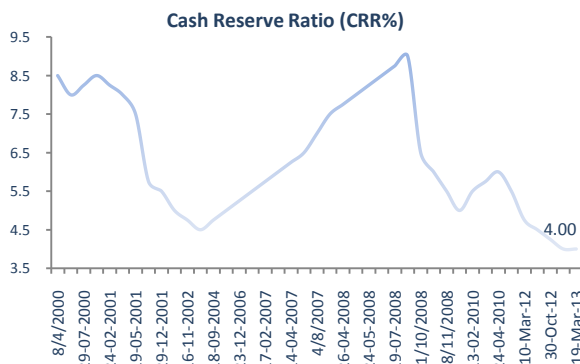
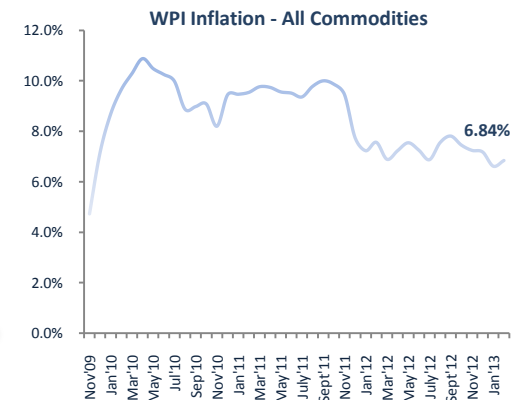
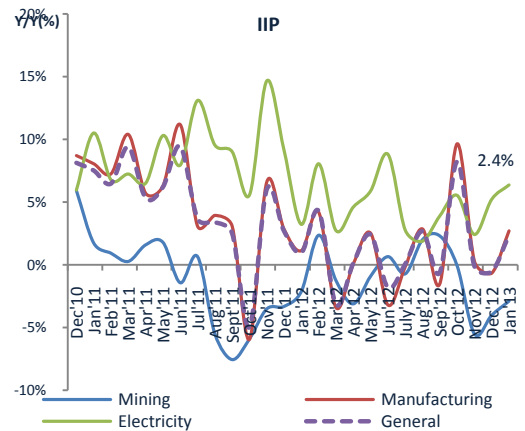
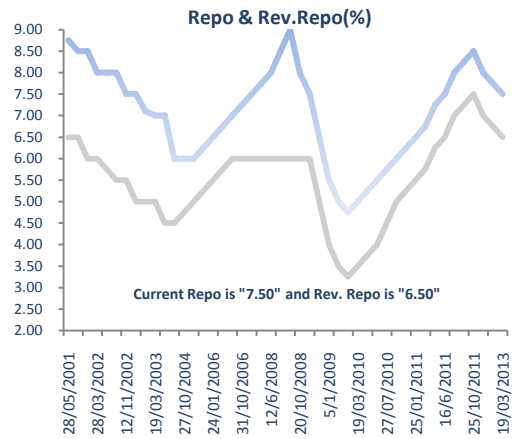
Domestic News

- ❖ Sun Pharma is now India's eighth-most-valuable business house, ahead of older and more diversified business houses, such as the Bajaj, OP Jindal, Anil Ambani, UB, Godrej and Hinduja. (BS)
- ❖ Welspun Corp Ltd, the flagship company of the US\$3.5 billion Welspun Group and the second largest line pipe company in the world, has announced part repurchase of 4.50% foreign currency convertible bonds (FCCBs), due in 2014. (BS)
- ❖ At a time passenger vehicle sales have sharply slowed, one would imagine that the outlook would be rather negative for Maruti Suzuki, the largest passenger carmaker in the country. But a sharp 22% fall in the stock price since February has made the stock attractive, given the company's performance compared to the sector. The stock is now trading at 13 times its consensus FY14 net earnings, which is a 15% discount to its historical average. (BS)
- ❖ Private sector insurer Bajaj Allianz may soon join the corporate bandwagon sponsoring IPL, an annual 20-20 cricket extravaganza, as a principal sponsor of the Mumbai Indians team. (BS)
- ❖ Tata Consultancy Services, India's biggest IT services company, has been ranked as number one employer in Europe for 2013 by the CRF Institute. (BS)
- ❖ Post Kingfisher Airlines fiasco, Indian banks are playing safe by asking airline companies to put more tangible collateral on the table. The Wadia group has offered a Rs 913 crore land in Thane, owned by a group company - Botanium Ltd, to its bankers to avail loan facilities. (BS)
- ❖ The general insurance industry termed the decision of the sectoral regulator to increase the motor insurance premium as a step in right direction, but too low to cover losses in this segment. (BS)



Domestic News(Conti..)

- ❖ Infrastructure major Larsen and Toubro (L&T) said it has completed the acquisition of its group firm, Audco India Ltd. (BS)
- ❖ Domestic air travel is going to be costlier again with both state-run Air India and private carrier Jet Airways hiking fuel surcharge on flight tickets by up to Rs 150. (BS)
- ❖ Titan Industries said one of its promoter firms Tata Sons has acquired an additional 4.37% stake in the company from another promoter entity Kalimati Investment for Rs 979.21 crore. (BS)
- ❖ National Stock Exchange is set to have a new chief tomorrow, when Chitra Ramkrishna will take over as Managing Director and CEO and join the select league of women leaders at the helm of affairs of leading stock exchanges of the world. (BS)
- ❖ State-run telecom company MTNL has raised Rs 1,005 crore through bonds backed by sovereign guarantee from institutional investors. (BS)
- ❖ Jindal Steel and Power's (JSPL's) bid to acquire a majority stake in Gujarat NRE Coke's Australian subsidiary has not been successful, with the company managing to acquire only 31.49% stake at the end of its open offer. (BS)
- ❖ Fraudsters have managed to steal customer database from ICICI Prudential causing a "loss" of over Rs 90 lakh to the insurance major after some policy holders either surrendered or discontinued policies believing the cheats. (BS)
- ❖ Reliance Life Insurance Company has reported over 24% decline in its premium income during April-February, the steepest fall among the major life insurers.(BS)
- ❖ Pharmaceutical firms will have to issue a public notice and inform authorities six months in advance if they plan to stop producing essential drugs, a government order said. (BS)
- ❖ Telecom PSU BSNL today said its Internet capacity has dropped by 21 per cent due to multiple fibre cuts in three under-sea cable systems that connect the country with many parts of the world. (BS)
- ❖ A month ago, Dharmesh Shah had enough time to spare for day to day activities of a lesser-known company—BDR Pharma—where he serves as chairman & managing director. (BS)
- ❖ Nasdaq-listed software firm Syntel is planning to invest \$60-65 million (around Rs 350 crore) in emerging verticals such as cloud and mobility during this year. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
28-Mar-13	Punj Lloyd Limited	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	BUY	6296000	49.89
28-Mar-13	Punj Lloyd Limited	GOLDMAN SACHS INVESTMENTS (MAURITIUS) 1 LTD	BUY	4000000	55.89
28-Mar-13	Adhunik Metaliks Limited	SUNGROWTH SHARE & STOCKS LTD	BUY	900000	29.18
28-Mar-13	Bhansali Eng. Polymers Lt	TWENTYFIRST CENTURY SECURITIES LTD.	BUY	852233	14
28-Mar-13	Banswara Syntex Limited	MEFCOM CAPITAL MARKET LTD	SELL	140000	48.95

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
28-Mar-13	Titan Inds	TATA SONS LIMITED	B	38780000	252.05
28-Mar-13	Yes Bank	MORGAN STANLEY ASIA (SINGAPORE) PTE	S	2855125	425.22
28-Mar-13	Seshasayee Pap	COROMANDEL SUGARS LTD	B	474463	252
28-Mar-13	North Eastern Car	YUTHIKA COMMERCIAL PVT LTD	B	1000000	72.81
28-Mar-13	Dhenu Buildcon	FOREVER FLOURISHING FINANCE & INVESTMENT PVT LTD	B	529551	66.1

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Rs.
500089	DIC India	2-Apr-13	Dividend	4
533288	Claris Lifesciences	4-Apr-13	Dividend	2
500830	Colgate Palmolive	4-Apr-13	3rd Interim Dividend	9
500660	Glaxosmithkl Phar	4-Apr-13	Dividend	50
513456	Kanishk Steel	4-Apr-13	Scheme of Arrangement	-
500674	SANOFI	5-Apr-13	Final Dividend	29
500166	Goodricke Group	9-Apr-13	Dividend	4
532172	Color Chips	10-Apr-13	Consolidation of Shares	-
532172	Color Chips	10-Apr-13	Reduction of Capital	-
533301	Shekhawati Poly-Yarn	10-Apr-13	Stock Split from Rs.10/- to Re.1/-	-
506222	Styrolution ABS	10-Apr-13	Dividend	-
512311	Surabhi Chem	10-Apr-13	Stock Split from Rs. 10/- to Re. 1/-	-
512311	Surabhi Chem	10-Apr-13	Interim Dividend	0.1
500870	Castrol India	12-Apr-13	Final Dividend	3.5
506390	Clariant Chem	12-Apr-13	Final Dividend	17.5
517174	Honeywell Auto	12-Apr-13	Dividend	-
500488	Abbott India	16-Apr-13	Final Dividend	17
500339	Rain Commodities	16-Apr-13	Final Dividend	1.1
520113	Vesuvius India	16-Apr-13	Dividend	4.5
500133	Esab India	18-Apr-13	Final Dividend	7.5
500472	SKF India	18-Apr-13	Dividend	7.5
509820	Paper Products	22-Apr-13	Dividend	2.6

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
4/1/2013	CNY	Chinese Manufacturing PMI	50.9	52	50.1
4/1/2013	USD	Construction Spending (MoM)		1.00%	-2.10%
4/1/2013	USD	ISM Manufacturing Index		54.2	54.2
4/2/2013	AUD	Interest Rate Decision		3.00%	3.00%
4/2/2013	EUR	Manufacturing PMI		46.6	46.6
4/2/2013	GBP	Manufacturing PMI		48.5	47.9
4/2/2013	EUR	Unemployment Rate		12.00%	11.90%
4/2/2013	USD	Factory Orders (MoM)		2.90%	-2.00%
4/3/2013	AUD	Trade Balance		-1.00B	-1.06B
4/3/2013	INR	Indian HSBC Services PMI			54.2
4/3/2013	GBP	Construction PMI		47.3	46.8
4/3/2013	USD	ADP Nonfarm Employment Change		200K	198K
4/3/2013	USD	ISM Non-Manufacturing Index		55.8	56
4/4/2013	AUD	Retail Sales (MoM)		0.30%	0.90%
4/4/2013	GBP	BOE QE Total		375B	375B
4/4/2013	GBP	Interest Rate Decision		0.50%	0.50%
4/4/2013	EUR	Interest Rate Decision		0.75%	0.75%
4/4/2013	USD	Initial Jobless Claims		347K	357K
4/5/2013	EUR	Retail Sales (MoM)		-0.40%	1.20%
4/5/2013	USD	Nonfarm Payrolls		200K	236K
4/5/2013	USD	Trade Balance		-44.6B	-44.5B
4/5/2013	USD	Unemployment Rate		7.70%	7.70%
4/5/2013	USD	Consumer Credit		16.00B	16.15B

Date	Curr.	Event	Actual	Forecast	Previous
4/1/2013	INR	HSBC Markit Manufacturing PMI			54.2
4/3/2013	INR	Indian M3 Money Supply			12.60%
4/5/2013	INR	Indian Bank Loan Growth			15.40%

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