

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7611	1.37	CNX IT	9912	0.94
Sensex	25414	1.25	BANK NIFTY	15242	1.66
DowJones	16827	(0.15)	S&P CNX 500	6174	1.51
Nasdaq	4408	0.23	CNX FMCG	17434	0.95
Hangseng	23191	(0.13)	CNX REALTY	3876	3.42
Shanghai	2047	(0.06)	CNX AUTO	6775	0.37
Nikkei	15367	1.35	CNX ENERGY	9968	1.76
Strait Times	3244	(0.36)	CNX PHARMA	8536	2.09
Kospi	1996	(0.30)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9421	0.30	Advances	2119	1140
FTSE	4423	(0.32)	Declines	929	390
CAC	9833	0.18	Unchanged	104	51
DAX	10924	(0.33)	Total	3152	1581

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BPCL	600.00	5.32
IDFC	135.15	5.30
PNB	992.50	4.31
SUNPHARMA	687.50	4.03
TATAPOWER	107.80	3.85

Nifty Losers		
Company	Price(Rs)	Chg(%)
MCDOWELL-N	2393.90	(3.87)
MARUTI	2437.50	(0.70)
BAJAJ-AUTO	2295.00	(0.61)
M&M	1148.00	(0.48)
TATAMOTORS	430.60	(0.40)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Ramkrishna Forg	7.99	0.0	704
KSK Energy	6.38	0.1	49
VAIBHAVGBL	1.99	0.1	21
Havells India	5.65	0.3	20
Gateway Distr	4.15	0.2	20

Indian Forex	Closing	Chg	% Chg
USD/INR	60.093	(0.002)	(0.00)
GBP/INR	102.327	(0.070)	(0.07)
EUR/INR	82.009	0.127	0.16
JPY/INR	59.280	0.010	0.02

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28100	0
Silver (Rs/1kg)	44155	(364)

Commodities	Price	% Chg.
Crude (US\$/BBL)	105.6	(0.17)
Brent (US\$/BBL)	112.4	(0.77)
Gold (US/oz)	1328.9	0.67
Silver (US\$/oz)	21.1	(0.05)
Copper (US\$/MT)	6955.0	(0.30)
Alum (US\$/MT)	1850.0	0.00
Zinc(US\$/MT)	2204.5	1.01

ADR	Cl. Values	% Chg.
ICICI Bank	49.90	1.12
HDFC Bank	46.82	0.40
Infosys	53.77	0.06
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	43.15	0.58
Wipro	11.89	0.05
Tata Motors	39.06	0.39

## Market Sensor

US market closed mixed on Monday, with Dow lower and the S&P 500 showing the longest streak of quarterly gains since 1998, as investors sorted through data in trying to determine the direction of the U.S. economy. Dow Jones Industrial Average was down 0.15% or 25.24 points at 16826.60. Nasdaq Composite was up 0.23% or 10.25 points at 4408.18. Standard & Poor's 500 was down 0.04% or 0.73 points at 1960.23.

Indian Equity market kick started the week with a strong rally, supported by banks, infra and pharma stocks. It seems the rally is driven on expectation that the new government will draw a growth oriented budget. Nifty ended the previous trading session with a gain of 1.37% or 102.55 points at 7611.35. On Monday's trading session, FII's bought net Rs.1288.16 Cr in cash market and sold net Rs.158.11 in derivative segment. Whereas, DII sold net Rs.181.23 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7540 followed by 7500 while resistance is seen at 7650 followed by 7710.**

## Global News

❖ Japanese companies increased their investment plans more than forecast even as a sales-tax hike dented sentiment, potentially aiding Prime Minister Shinzo Abe's effort to stoke an economic recovery. (Bloomberg)

❖ The most-actively traded Chinese companies in the U.S. are on pace to report the smallest profits in two years as growth in the world's second-largest economy decelerates to the slowest since 1990. (Bloomberg)

❖ China's manufacturing expanded in June at the fastest pace this year, adding to signs that the government's efforts to arrest a slowdown are helping to stabilize the world's second-biggest economy. (Bloomberg)

❖ Mario Draghi's newest stimulus package aims to do something previous measures haven't achieved -- push ultra-low interest rates through to the economy. (Bloomberg)

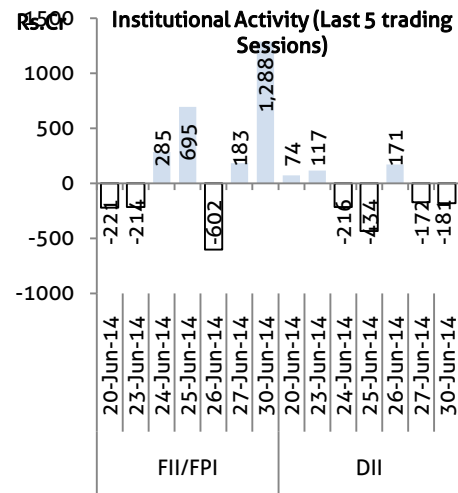
❖ The number of contracts to purchase previously owned U.S. homes jumped in May by the most in more than four years, a sign the residential-real estate market is rebounding after a slow start to the year. (Bloomberg)

## Economic News

- ❖ India's fiscal deficit in the first two months of the 2014/15 financial year touched 2,408.37 billion rupees (\$40.05 bln), or 45.6% of the full-year target, government data showed on Monday. (BS)
- ❖ India, an emerging global economic power, has the potential to become the largest economy in the world, Facebook Chief Operating Officer (COO) Sheryl Sandberg said on Monday. (BS)
- ❖ Cheap industrial imports from China have long hurt Indian manufacturers, especially the Micro, Small and Medium Enterprises (MSME) sector. (BS)
- ❖ India will auction unutilised investment limits in government debt worth 55.16 billion rupees (\$917.88 million) to foreign investors on Tuesday, exchange operator BSE Ltd said in a circular on Monday. (BS)
- ❖ India and China signed three key MoUs, including one on industrial parks and flood data of Brahmaputra river, coinciding with the visit of Vice President Hamid Ansari here. (BS)
- ❖ Prime Minister Narendra Modi never had a high opinion of the Planning Commission, an institutional vestige of the country's attempts to mimic the Soviet command economy during the infancy of its independence more than half a century ago. (BS)
- ❖ Prime Minister Narendra Modi has set in motion the first major revamp in decades of the archaic labour laws, part of a plan to revive the flagging economy, boost manufacturing and create millions of jobs. (BS)
- ❖ The Reserve Bank of India (RBI) has quietly switched to using an electronic bond trading platform to manage cash levels in the debt market, hoping a more discreet approach will have less impact on bond yields, two officials familiar with the trades told Reuters. (BS)

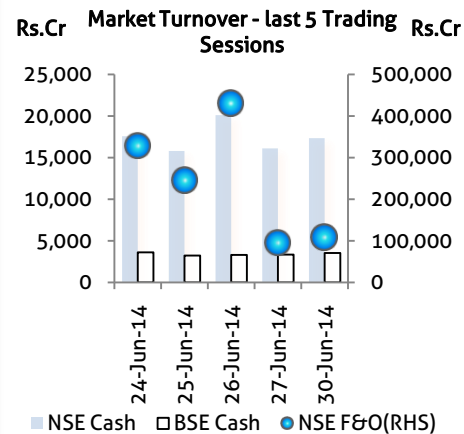
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3689	(0.0003)	(0.02)
GBP-USD	1.7105	(0.0001)	(0.01)
USD-JPY	101.52	0.19	0.19

Bond Markets	Closing	Chg
10-yr bond	8.77	2.0 bps
Interbank call	8.49	57.0 bps



## Domestic News

- ❖ Shriram Transport Finance Company is set to raise Rs 3,000 crore through public issue of secured redeemable Non-Convertible Debentures (NCDs). The first issue shall hit the market on Wednesday where the company plans to raise Rs 500 crore with an option to retain over-subscription upto the shelf limit of Rs 3,000 crore. However, initially the company may decide to raise only up to Rs 1,500 crore in the first tranche and close the issue before the closing date of July 22. (BS)
- ❖ Multiplex operator Inox Leisure is in talks with Satyam Cineplexes to buy the Gurgaon-based rival, a move which would expand its foothold further in the film exhibition market in the northern region. (BS)
- ❖ A securities tribunal upheld on Monday the Rs 11 crore (\$1.83 million) penalty imposed on a unit of Reliance Industries Ltd by the Securities and Exchange Board of India (Sebi) for insider trading. (BS)
- ❖ Private power producers have made a pitch for pooling the price of domestic as well as imported gas aimed at revamping over Rs 1 trillion worth of plants stranded due to scarcity of fuel. (BS)
- ❖ Electrical goods manufacturer Havells India has undertaken a subdivision of its equity shares of Rs 5 into Rs one each after getting the mandatory approval from its board. (BS)
- ❖ Delayed by over two years due to natural calamities, the 1200 MW Teesta III hydropower project in Sikkim is scheduled to commence commercial production in the first quarter of 2015. (BS)



## Domestic News (Cont...)

❖ What is the loss if you bought an asset for 595 million pounds in 2007 and sold it off for 408 million pounds in 2014? Simple maths would say it was 187 million pounds. But, according to United Spirits (USL) it is Rs 4,652 crore. (BS)

❖ Cipla Ltd has signed a definitive agreement to acquire a 51% stake in a pharmaceuticals manufacturing and distribution business in Yemen (owned by a UAE-based parent company) for \$21 million. This is second buyout of Cipla this month. Two weeks ago, Cipla had acquired 60% stake in a Sri Lanka-based company for \$14 million. (BS)

❖ Retirement fund body EPFO launched online registration facility for employers, a move that will help firms get employers' code within a day. (BS)

❖ Tata Sons has appointed Gopichand Katragadda as the group's Chief Technology Officer (CTO). (BS)

❖ Retirement fund body EPFO launched online registration facility for employers, a move that will help firms get employers' code within a day. (BS)

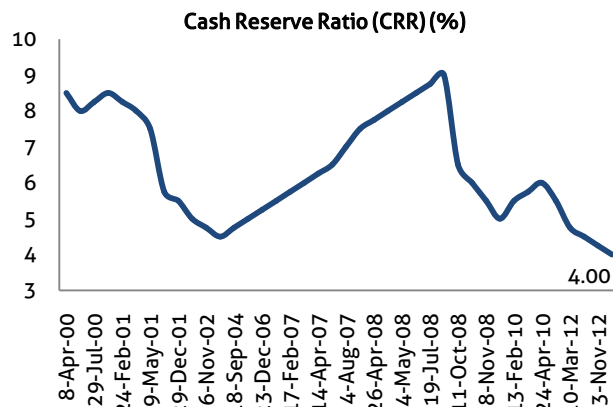
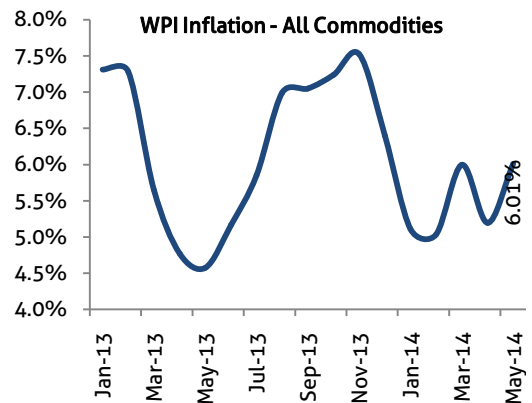
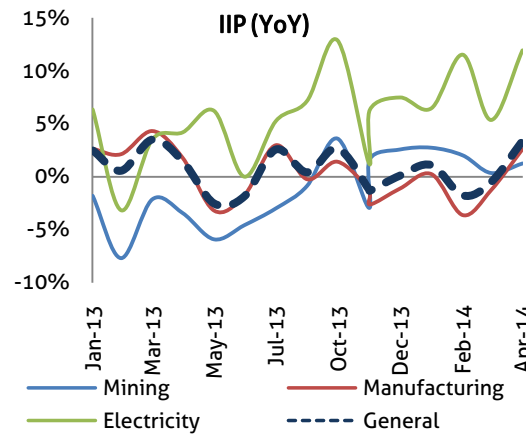
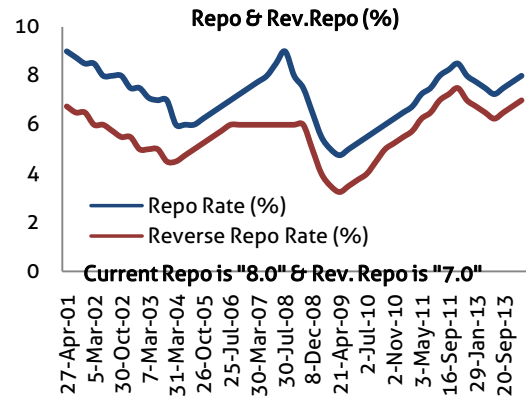
❖ Manoj Thakur, CEO, Avendus Private Equity has quit the company. Thakur was part of the founding team which set up private equity business for Avendus. The reason for his exit is not known. (BS)

❖ Media firm TV18 Broadcast launched a new business channel 'CNBC Bajar' in the Gujarati language. (BS)

❖ Telecom operator Aircel announced a new scheme under which its subscribers can customise their monthly mobile plans online. (BS)

❖ Reliance Industries will defer investments in developing newer fields like R-Cluster in KG-D6 block if the government does not hike gas prices to make them economically viable to produce. (BS)

❖ Nasdaq-listed software company Progress Software Corporation said that Pacific, its platform-as-a-service for building and managing business apps on cloud, mobile or social platforms, recently integrated with responsive UI (user interface), would help enterprises and startups cut costs by building apps at once and make them compatible with multiple devices like smartphones, tablets, phablets, desktops, laptops and televisions. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Jun-14	Hinduja Ventures Limited	AASIA CORPORATION	BUY	410570	305.5
30-Jun-14	Easun Reyrolle Relays	IDFC MUTUAL FUND	SELL	916015	93.7
30-Jun-14	Rohit Ferro-Tech Limited	PRADIP KUMAR SHAH	SELL	774961	11.1
30-Jun-14	Dr. Datson's Labs Ltd	MARFATIA NISHIL SURENDRA	SELL	452486	15.8
30-Jun-14	Decolight Ceramics Limite	IYER H NAGMANI	SELL	1780683	3.0

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Jun-14	Ramkrishna Forg	SBI MUTUAL FUND A/C MBAL	B	658,239	170.0
30-Jun-14	KGN Inds	THE ROYAL BANK OF SCOTLAND ASIA MERCHANT BANK (SINGAPORE) LIMITED	S	1,530,567	11.7
30-Jun-14	Cubical Fin	SHREE AERAN MARKET PVT LTD	B	500,000	20.0
30-Jun-14	Rohit Ferro	PRADIP KUMAR SHAH	B	711,565	11.3
30-Jun-14	Nikki Global	SIDDHARTH GUPTA	S	54,000	146.0

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
524348	Aarti Drugs	02-Jul-14	Final Dividend - Rs.5.50	-
532927	Eclerx Serv	02-Jul-14	Dividend - Rs.35.00	-
500314	Oriental Hotels	02-Jul-14	Dividend - Rs.0.55	-
505807	Rolcon Engr	02-Jul-14	Dividend - Rs.1.50	-
506863	Swadeshi Inds	02-Jul-14	Stock Split from Rs.10/- to Re.1/-	03-Jul-14
532977	Bajaj Auto	03-Jul-14	Dividend - Rs.50.00	-
532978	Bajaj Finserv	03-Jul-14	Dividend - Rs.1.75	-
500490	Bajaj Holdings	03-Jul-14	Dividend - Rs.30.00	-
500034	BAJFINANCE	03-Jul-14	Dividend - Rs.16.00	-
532483	Canara Bank	03-Jul-14	Final Dividend - Rs.4.50	-
500182	Hero MotoCorp	03-Jul-14	Dividend - Rs.65.00	-
500234	Kakatiya Cem	03-Jul-14	Dividend - Rs.2.70	-
590003	Karur Vysya Bank	03-Jul-14	Dividend - Rs.13.00	-
500266	Maharashtra Scoot	03-Jul-14	Dividend - Rs.25.00	-
532720	Mahindra & Mah Fin	03-Jul-14	Dividend - Rs.3.80	-
532784	Sobha Dev	03-Jul-14	Dividend - Rs.7.00	-
532301	Tata Coffee	03-Jul-14	Dividend - Rs.13.00	-
506690	Unichem Lab	03-Jul-14	Final Dividend - Rs.4.00	-
531335	Zydus Wellness-\$	03-Jul-14	Dividend - Rs.6.00	-
500469	Federal Bank	04-Jul-14	Dividend - Rs.2.00	-
500010	HDFC	04-Jul-14	Dividend - Rs.14.00	-
505750	Josts Engr	04-Jul-14	Dividend - Rs.12.50	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Jun-14	JPY	Industrial Production (MoM)		0.90%	-2.80%
30-Jun-14	JPY	Construction Orders (YoY)			104.90%
30-Jun-14	EUR	Private Loans (YoY)		-1.60%	-1.80%
30-Jun-14	GBP	BoE Consumer Credit		0.70B	0.67B
30-Jun-14	GBP	Mortgage Lending		1.60B	1.72B
30-Jun-14	USD	Chicago PMI		63	65.5
30-Jun-14	USD	Pending Home Sales (MoM)		1.50%	0.40%
30-Jun-14	USD	Dallas Fed Mfg Business Index			8
01-Jul-14	JPY	Tankan Large Manufacturers Index		15	17
01-Jul-14	CNY	Chinese Manufacturing PMI		51	50.8
01-Jul-14	USD	Total Vehicle Sales		16.40M	16.77M
01-Jul-14	EUR	Manufacturing PMI		51.9	51.9
01-Jul-14	GBP	Manufacturing PMI		56.8	57
01-Jul-14	EUR	Unemployment Rate		11.70%	11.70%
01-Jul-14	USD	Construction Spending (MoM)		0.50%	0.20%
01-Jul-14	USD	ISM Manufacturing Employment		53.4	52.8
01-Jul-14	USD	ISM Manufacturing PMI		55.9	55.4
02-Jul-14	GBP	Nationwide HPI (MoM)		0.60%	0.70%
02-Jul-14	EUR	PPI (MoM)		-0.10%	-0.10%
02-Jul-14	USD	MBA 30-Year Mortgage Rate			4.33%
02-Jul-14	USD	Challenger Job Cuts			53.0K
02-Jul-14	USD	ADP Nonfarm Employment Change		203K	179K
02-Jul-14	USD	Factory Orders (MoM)		-0.20%	0.70%
03-Jul-14	EUR	Retail Sales (MoM)		0.20%	0.40%
03-Jul-14	EUR	Interest Rate Decision			0.15%
03-Jul-14	USD	Initial Jobless Claims		314K	312K
03-Jul-14	USD	Nonfarm Payrolls		210K	217K
03-Jul-14	USD	Trade Balance		-45.00B	-47.20B
03-Jul-14	USD	Unemployment Rate		6.30%	6.30%
03-Jul-14	USD	ISM Non-Manufacturing PMI		56.3	56.3

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Jul-14	INR	HSBC Markit Manufacturing PMI			51.4
03-Jul-14	INR	Indian HSBC Services PMI			50.2

### Disclaimer:

This report is for the personal information of the authorized recipient and does not constitute to be any investment, legal or taxation advice to you. Ashika Stock Broking Ltd., is not soliciting any action based upon it. This report is not for public distribution and has been furnished to you solely for your information and should not be reproduced or redistributed to any other person in any form. The report is based upon information that we consider reliable, but we do not represent that it is accurate or complete, and it should not be relied upon such. Ashika Stock Broking Ltd. or any of its affiliates or employees shall not be in anyway responsible for any loss or damage that may arise to any person from any inadvertent error in the information contained in this report. Ashika Stock Broking Ltd., or any of its affiliates or employees do not provide, at any time, any express or implied warranty of any kind, regarding any matter pertaining to this report, including without limitation the implied warranties of merchantability, fitness for a particular purpose, and non-infringement. The recipients of this report should rely on their own investigations. "Ashika Stock Broking Ltd., and/or its affiliates and /or employees may have interests/positions, financial or otherwise in the securities mentioned in this report."