

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5742	(0.23)	CNX IT	7787	0.89
Sensex	19346	(0.01)	BANK NIFTY	10016	(1.90)
DowJones	15500	(0.14)	S&P CNX 500	4380	(0.24)
Nasdaq	3626	0.27	CNX FMCG	17481	(2.33)
Hangseng	22131	1.13	CNX REALTY	168	(2.50)
Shanghai	2028	1.69	CNX AUTO	4474	0.73
Nikkei	13802	0.98	CNX ENERGY	7717	0.98
Strait Times	3249	0.84	CNX PHARMA	7108	0.73
Kospi	1924	0.50	Advances / Declines	BSE	NSE
Taiwan	8091	(0.21)	Advances	837	401
FTSE	6621	0.76	Declines	1393	781
CAC	3993	0.15	Unchanged	140	50
DAX	8276	0.06	Total	2370	1232

Nifty Gainers		
Company	Price(Rs)	Chg(%)
IDFC	345.20	7.51
JINDALSTEL	2279.00	4.67
HCLTECH	159.20	4.36
SUNPHARMA	876.50	4.35
LT	90.15	4.22

Nifty Losers		
Company	Price(Rs)	Chg(%)
BPCL	150.10	(6.25)
RELINFRA	1025.45	(6.18)
DLF	99.25	(5.97)
RANBAXY	130.00	(5.59)
ONGC	36.15	(4.24)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Jyothy Lab	7.35	0.02	443.39
Sobha Dev	6.16	0.03	182.34
Kirloskar Pneu	14.11	0.08	166.39
Havells India	1.39	0.01	161.04
Emami-\$	8.04	0.07	113.66

Indian Forex	Closing	Chg	% Chg
USD/INR	61.1150	1.2870	2.15
GBP/INR	92.9742	1.2160	1.33
EUR/INR	80.9535	1.6258	2.05
JPY/INR	62.4400	1.6000	2.63

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28715	443
Silver (Rs/1kg)	42129	1049

Commodities	Price	% chg.
Crude (US\$/BBL)	105.5	2.04
Brent (US\$/BBL)	108.0	1.01
Gold (US/oz)	1325.8	(0.63)
Silver (US\$/oz)	19.7	(1.11)
Copper (US\$/MT)	6805.0	0.78
Alum (US\$/MT)	1732.0	(0.55)
Zinc(US\$/MT)	1793.0	(0.44)

ADR	Cl. Values	% Chg.
ICICI Bank	32.78	(0.18)
HDFC Bank	32.90	(0.43)
Infosys	49.68	(0.02)
Sterlite Inds.	5.03	0.13
Dr Reddy's Labs	37.27	1.14
Wipro	8.62	0.16
Tata Motors	24.04	0.29

Market Sensor

U.S market wrapped up the final trading day of the month on a flat note, but still logged their best July since 2010, as the Federal Reserve said it will maintain its bond-buying policy in its ongoing effort to bolster the economy. Dow Jones Industrial Average was down 0.14% or 21.05 points at 15499.54. Nasdaq Composite was up 0.27% or 9.90 points at 3626.37. Standard & Poor's 500 was up 0.01% or 0.23 points at 1685.73.

Indian markets witnessed yet another volatile trading session ending marginally in red. Recovery in the European market and optimism from the US Federal Reserve policy meeting led the recovery in the market. Nifty ended the previous trading session with a decline of 0.23% or 13.05 points at 5742.00. On Friday's trading session, FIIs bought net Rs.142.87 Cr in cash market and sold net Rs 304.41. in derivative segment. Whereas, DII sold net Rs.128.02 Cr in cash segment.

Coming to today's trade, Nifty might trade volatile with positive bias with intraday support placed at 5700, while resistance for the day is seen at 5800.

Global News

❖ A gauge of Australian manufacturing slumped in July as a decline in the currency and earlier interest-rate cuts failed to boost exports and local demand. (Bloomberg)

❖ The Federal Reserve said persistently low inflation could hamper the economic expansion and pledged to keep buying \$85 billion in bonds every month. (Bloomberg)

❖ Bank of England Governor Mark Carney will probably oversee another stimulus pause at his second policy meeting as he trains officials' focus on providing forward guidance to cement the economic recovery. (Bloomberg)

❖ In a major reform push, China on Wednesday announced a slew of measures, including permitting private capital to build hospitals, in healthcare, education, culture and tourism, would be taken to halt the slowdown of the world's second-largest economy. (Moneycontrol)

Economic News

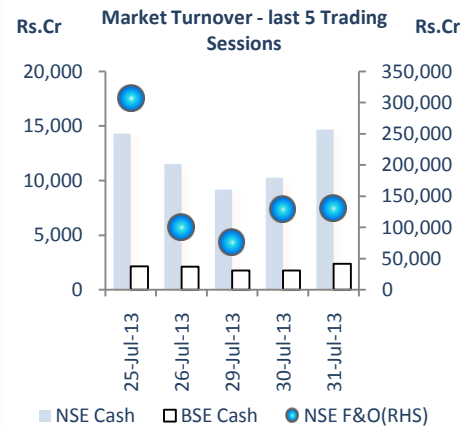
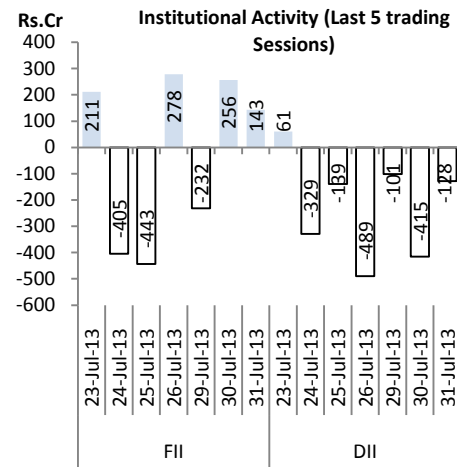
- ❖ Just days after the government approved the Jet-Etihad deal, it is all set to change the definition of 'control' in the foreign direct investment (FDI) policy.(BS)
- ❖ Retail inflation for industrial workers rose to 11.06% in June compared 10.68% in May due to rise in prices of food items, cigarette, electricity charges, doctor's fee, medicines and petrol.(BS)
- ❖ Finance Minister P Chidambaram said he expects the economy to grow between 5.5-6% in the current fiscal on the back of global challenges and slowdown in investment.(BS)
- ❖ Every government or party can be blamed for this. They target the top and the bottom of the society. The top consists of industrialists, companies and in the context of India and some other countries, foreign institutional investors who get the best treatment and tax sops because they aid growth and create jobs. The argument: Without the lure of profits, they will not invest. The bottom also gets the best sops and tax benefits because they are the downtrodden who need to be hand-held constantly.(BS)
- ❖ West Bengal Chief Minister Mamata Banerjee would meet prominent industrialists in Mumbai tomorrow. (BS)
- ❖ Though 2,700 acres were acquired for the proposed mega steel plant by Posco near here, resentment seems to be brewing among locals who felt the administration had adopted a dilly-dally approach on issues of compensation, rehabilitation and peripheral development.(BS)
- ❖ Commerce and industry minister Anand Sharma said India's widening trade deficit with China is "not healthy" for the growth of the economy.(BS)
- ❖ RBI's liquidity squeezing measures will continue and they will be reversed only once the rupee is stabilized, Governor D Subbarao said hinting at more tightening through bond sales. (BS)

Domestic News

- ❖ Even as the Foreign Investment Promotion Board (FIPB) has given its green signal to the \$379-million deal that will see Abu Dhabi's Etihad Airways buying a 24 per cent stake in Jet Airways, all is not over as the board has referred it back to the market regulator, while the final call has to be taken by the Union Cabinet. Besides, questions remain on the bilateral air services agreement (BASA) between India and the United Arab Emirates (UAE).(BS)
- ❖ Amid the overwhelming opposition to the Niyamgiri bauxite mining project at the recently held gram sabhas, Vedanta Aluminium is in a quandary on a sustainable alternative for its one-million-tonne Lanjigarh refinery. Though the company has applied for prospecting licences and mining leases at 26 sites in a 150-km radius of the Niyamgiri Hills, it feels a solution to its raw material concern is unlikely. (BS)
- ❖ Power generator NTPC Ltd has posted a marginal 1.1 per cent growth in net profit for the quarter ended June. (BS)
- ❖ Petronet LNG's net profit for the first quarter ended June was Rs 225 crore, down 17 per cent from Rs 271 crore in the year-ago period. Volume regasified during the quarter was 129.5 trillion British thermal units, leading to a turnover of Rs 8,444 crore, a 20 per cent increase over the year-ago period.(BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3275	(0.0027)	(0.20)
GBP-USD	1.5164	(0.0043)	(0.28)
USD-JPY	98.22	0.34	0.35

Bond Markets	Closing	Chg
10-yr bond	8.54	17.4 bps
Interbank call	9.65	-35.0 bps



Domestic News(Conti..)

❖ This financial year, India's 3G subscriber base is expected to double to about 56 million, according to a recent analysis by PhilipCapital. The survey added by March 2015, the subscriber base was estimated to exceed 96 million.(BS)

❖ In a huge dampener for Formula One enthusiasts in India, the 2014 Indian Grand Prix was on Tuesday dropped following a rejig in racing calendar for the coming year, according to race organisers JPSI, who said the motorsport extravaganza will now come back to country in March 2015.(BS)

❖ Primarily led by robust sales in the US generics market, Hyderabad-based pharmaceutical major Dr Reddy's Laboratories Limited (DRL) reported a 7% increase in its net profit to Rs 361 crore for the first quarter ended June 2013, as compared with Rs 336 crore in the corresponding quarter last year. (BS)

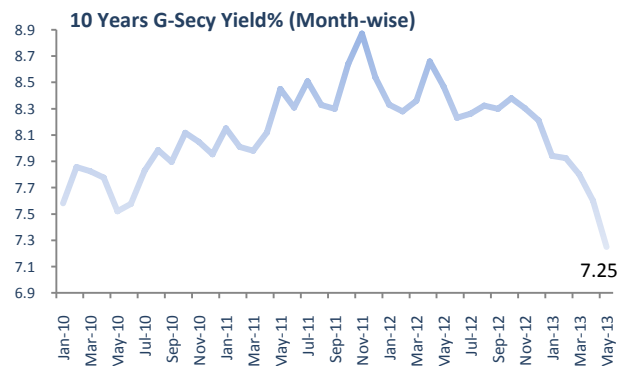
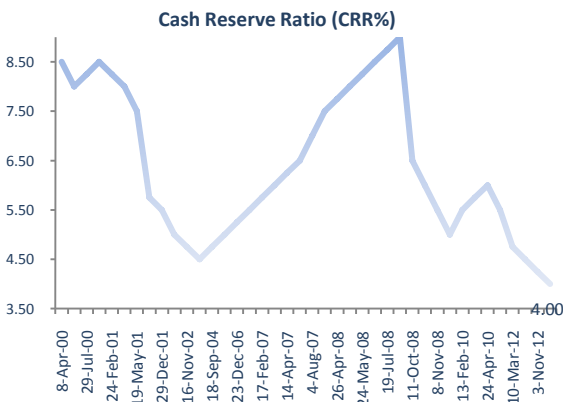
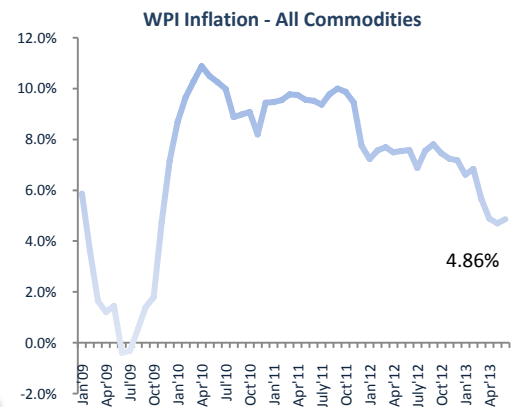
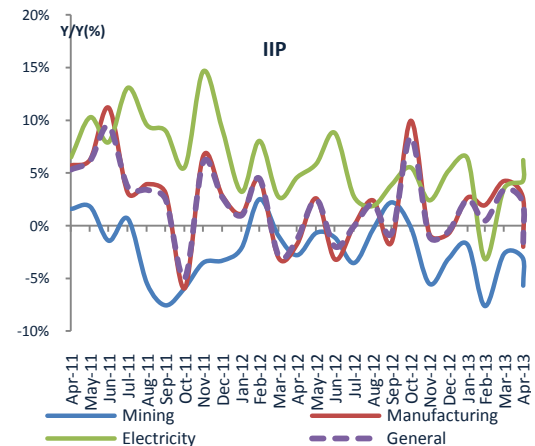
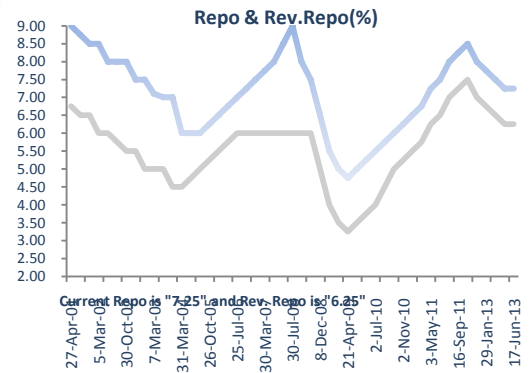
❖ Larsen & Toubro won its biggest ever overseas order in Saudi yesterday, and says that it will hire more hands in that country (BS)

❖ Reliance Infrastructure's and Reliance Power's (both owned by Anil Ambani) net profits were up 0.7 per cent and 0.2 per cent, respectively, in the quarter ended June over the year-ago period .(BS)

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❖ Maharashtra-based seed company Mahyco Seeds said it has bought technology from US-based agricultural technology company Arcadia Biosciences to develop Nitrogen Use Efficient (NUE) rice in India. (BS)

❖ Janalakshmi Financial Services, the Bangalore-based NBFC focussed on lending to the urban poor, is understood to be closing in on a transaction to raise Rs 300 crore through the private equity route. The company, floated by social entrepreneur Ramesh Ramanathan, has so far raised a total of around Rs 250 crore and the fresh transaction is expected to be closed within the next month (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
31-Jul-13	Yes Bank Limited	NORWEST VENTURE PARTNERS X FII - MAURITIUS	BUY	3540799	292
31-Jul-13	D.B.Corp Ltd	AMANSA HOLDINGS PRIVATE LIMITED	BUY	1196000	248
31-Jul-13	Karnataka Bank Limited	BNP PARIBAS ARBITRAGE	SELL	1275000	79.13
31-Jul-13	Vmart Retail Ltd	RELIANCE MUTUAL FUND	SELL	380801	175
31-Jul-13	Aanjaneya Lifecare Ltd	DOMEBELL ELECTRONICS INDIA PVT.LTD	BUY	107846	32.54

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
31-Jul-13	Kirloskar Bros-\$	AMANSA INVESTMENTS LIMITED	B	755000	162.00
31-Jul-13	V-Mart Retail	JWALAMUKHI INVESTMENT HOLDINGS	B	593974	174.87
31-Jul-13	Choice Infra	POOJA MANU GOEL	B	170000	54.73
31-Jul-13	Rubfila Intl	SETHUPARVATHY	B	254110	18.55
31-Jul-13	Aanjaneya Lifecare	REPRODUCTIONS PRIVATE LIMITED	S	75000	31.01

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
524075	Albert David-\$	31-Jul-13	Dividend - Rs.4.50	-
502219	Borosil Glass	31-Jul-13	Dividend - Rs.15.00	-
500300	Grasim Inds	31-Jul-13	Dividend - Rs.22.50	-
532950	Manjushree Techno	31-Jul-13	Dividend - Rs.1.00	-
526739	Narmada Gelt	31-Jul-13	Dividend - Rs.5.00	-
500790	Nestle India	31-Jul-13	Interim Dividend - Rs.18.00	1-Aug-13
534425	Speciality Rest	31-Jul-13	Dividend - Rs.1.00	-
523756	SREI Infra	31-Jul-13	Dividend - Rs.0.50	-
506687	Transpek Inds-\$	31-Jul-13	Dividend - Rs.3.00	-
503349	Victoria Mills	31-Jul-13	Dividend - Rs.50.00	-
523411	ADCINDIA	1-Aug-13	Dividend - Rs.1.50	-
532683	AIA Engineering	1-Aug-13	Dividend - Rs.4.00	-
532259	Apar Inds	1-Aug-13	Final Dividend - Rs.5.25	-
500493	Bharat Forge	1-Aug-13	Final Dividend - Rs.2.40	-
506197	Bliss GVS	1-Aug-13	Final Dividend - Rs.0.40	-
523019	BN Rathi	1-Aug-13	Dividend - Rs.1.00	-
526731	Bright Bros-\$	1-Aug-13	Dividend - Rs.2.00	-
532834	Camlin Fine	1-Aug-13	Dividend - Rs.0.60	-
531344	Container Corp	1-Aug-13	Final Dividend - Rs.9.50	-
522295	Control Print-\$	1-Aug-13	Final Dividend - Rs.2.00	-
526705	Elegant Marb	1-Aug-13	Dividend - Rs.2.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
29-Jul-13	JPY	Retail Sales (YoY)		1.90%	0.80%
29-Jul-13	USD	Pending Home Sales (MoM)		-1.00%	6.70%
30-Jul-13	EUR	Consumer Confidence		-17	-18.8
30-Jul-13	USD	CB Consumer Confidence		81.3	81.4
31-Jul-13	USD	ADP Nonfarm Employment Change		180K	188K
31-Jul-13	USD	GDP (QoQ)		1.00%	1.80%
1-Aug-13	CNY	Chinese HSBC Manufacturing PMI			47.7
1-Aug-13	GBP	Interest Rate Decision		0.50%	0.50%
1-Aug-13	EUR	Interest Rate Decision		0.50%	0.50%
1-Aug-13	USD	Initial Jobless Claims		345K	343K
1-Aug-13	USD	Construction Spending (MoM)		0.40%	0.50%
1-Aug-13	USD	ISM Manufacturing Index		52	50.9
2-Aug-13	GBP	Construction PMI		51.5	51
2-Aug-13	USD	Nonfarm Payrolls		185K	195K
2-Aug-13	USD	Personal Spending (MoM)		0.50%	0.30%
2-Aug-13	USD	Unemployment Rate		7.50%	7.60%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Jul-13	INR	Indian Interest Rate Decision		7.30%	7.25%
1-Aug-13	INR	HSBC Markit Manufacturing PMI			50.3

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