

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5735	(1.68)	CNX IT	8168	0.02
Sensex	19380	(1.76)	BANK NIFTY	9618	(2.85)
DowJones	15130	(0.84)	S&P CNX 500	4392	(1.43)
Nasdaq	3771	(0.27)	CNX FMCG	17637	(1.32)
Hangseng	22860	(1.50)	CNX REALTY	150	(2.48)
Shanghai	2175	0.68	CNX AUTO	4682	(1.41)
Nikkei	14591	0.93	CNX ENERGY	7515	(1.50)
Strait Times	3194	0.83	CNX PHARMA	7361	(0.05)
Kospi	2009	0.59	Advances / Declines	BSE	NSE
Taiwan	8208	0.42	Advances	877	403
FTSE	6462	(0.77)	Declines	1407	775
CAC	4143	(1.03)	Unchanged	137	53
DAX	8594	(0.77)	Total	2421	1231

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ACC	1112.00	1.13
HINDUNILVR	627.00	0.97
HCLTECH	1081.95	0.86
BPCL	330.30	0.52
LUPIN	855.20	0.20

Nifty Losers		
Company	Price(Rs)	Chg(%)
NMDC	120.00	(5.33)
TATASTEEL	272.35	(5.24)
JPASSOCIAT	34.90	(4.64)
ICICIBANK	880.90	(4.59)
COALINDIA	293.80	(4.27)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
CGCL	5.97	0.60	9.94
Cummins India	10.29	1.11	9.23
Religare Enter	41.86	4.58	9.15
Edelweiss Financial	23.37	2.79	8.38
LIQUIDBEES	10.06	1.65	6.09

Indian Forex	Closing	Chg	% Chg
USD/INR	62.770	0.959	1.55
GBP/INR	101.416	1.919	1.93
EUR/INR	84.675	1.254	1.50
JPY/INR	64.150	1.490	2.38

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	30200	322
Silver (Rs/1kg)	49205	480

Commodities	Price	% Chg.
Crude (US\$/BBL)	102.0	(0.89)
Brent (US\$/BBL)	108.0	(0.57)
Gold (US/oz)	1329.1	(0.75)
Silver (US\$/oz)	21.8	(0.37)
Copper (US\$/MT)	7290.5	0.52
Alum (US\$/MT)	1803.0	0.75
Zinc(US\$/MT)	1876.5	(0.21)

ADR	Cl. Values	% Chg.
ICICI Bank	30.48	(0.60)
HDFC Bank	30.78	(0.57)
Infosys	48.11	(0.51)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	37.79	(0.23)
Wipro	10.26	(0.03)
Tata Motors	26.62	(0.58)

Market Sensor

U.S market finished sharply lower Monday, as the budget impasse in Washington threatened the first government shutdown in nearly 17 years, but major indexes still capped a rocky month and quarter with robust gains. Dow Jones Industrial Average was down 0.84% or 128.57 points at 15129.67. Nasdaq Composite was down 10.12% or 0.27 points at 3771.48. Standard & Poor's 500 was down 0.60% or 10.20 points at 1681.55.

Indian market started the week on a weak note on concern of U.S. Government heading for a shutdown amid budget stalemate followed by uncertainty over the major domestic economic data about to be released this week. Nifty ended the previous trading session with a decline of 1.68% or 97.90 points at 5735.30. On Friday's trading session, FIIs sold net Rs.519.645 Cr in cash market and bought net Rs 155.96 in derivative segment. Whereas, DII bought net Rs.89.76 Cr in cash segment.

Coming to today's trade Nifty may remain volatile with crucial support seen at 5680, breach of which might drag the Index further lower till 5600.

Global News

❖ The U.S. Congress headed into the final hours before the first partial government shutdown in 17 years with neither side budging or negotiating before a midnight deadline. (Bloomberg)

❖ A Chinese factory gauge rose less than economists forecast in September, signaling limits on the nation's rebound from a two-quarter economic slowdown. (Bloomberg)

❖ A partial shutdown of the federal government would cost the U.S. at least \$300 million a day in lost economic output at the start, according to IHS Inc. (Bloomberg)

❖ The U.S. Labor Department won't release its monthly employment report if the federal government is closed on Oct. 4, the day of the scheduled release, according to an Obama administration official. (Bloomberg)

❖ Confidence among Japan's large manufacturers rose to the highest since the early stages of the global credit crisis in 2007, as Prime Minister Shinzo Abe readies steps to cushion the economy from a sales-tax increase. (Bloomberg)

Economic News

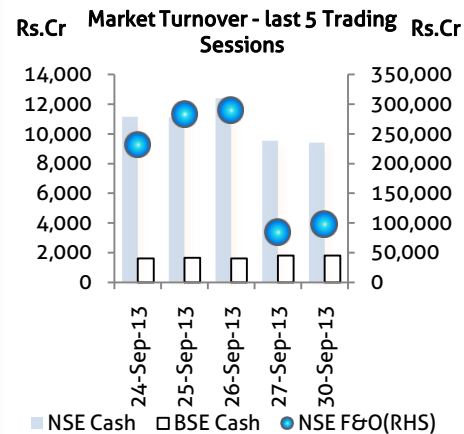
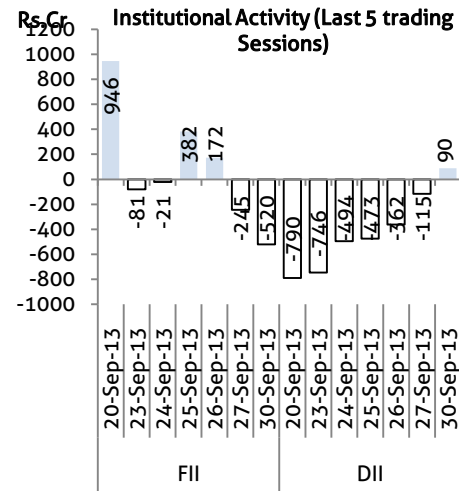
- ❖ Current account deficit of 4.9% in the first quarter was on expected lines and it is expected to improve on the back of robust exports growth and a dip in oil and gold imports, India Inc said .(BS)
- ❖ Corporate Affairs Minister Sachin Pilot said the industry would be free to choose CSR programmes and strategies best suited to their company's philosophy and businesses. (BS)
- ❖ Enormous rise in plan expenditure has pushed the Centre's fiscal deficit to 74.6% of the Budget Estimate (BE) in just five months of the current financial year. (BS)
- ❖ Eight infrastructure industries posted a 7-month high growth rate of 3.7 per cent in August on the back of good performance by power, cement, steel and fertiliser sectors. (BS)
- ❖ The Tamil Nadu government has decided to reduce the duration of power cuts in high tension industrial units and commercial establishments other than peak hours from 40% to 20% from tomorrow. (BS)
- ❖ The government said industry should invest more in R&D, innovation and clusters development to become efficient and compete with countries like China. (BS)
- ❖ The much-touted study to assess the estimate of black money stashed in the country and abroad is yet to be completed despite an assurance given by Government in 2011 to finish the task within 18 months. (BS)
- ❖ The Union power ministry has urged the Odisha government to expedite finalization of land rates and rehabilitation package for the Dulanga coal block awarded to NTPC. (BS)
- ❖ UP has been ranked top with maximum share of about 40% in the new investments attracted by real estate sector among top 20 states across the country during the first quarter of current fiscal, industry body ASSOCHAM said .(BS)

Domestic News

- ❖ Concerned over a widespread practice of executives manipulating their companies' finances to meet performance targets, a Sebi-commissioned study has suggested stronger surveillance, monitoring and regulatory action for such entities.(BS)
- ❖ Jet Airways Chairman Naresh Goyal picked up over one per cent stake in the airline from another promoter entity, Tail Winds, for over Rs 33 crore. (BS)
- ❖ Tata Communications said that it is in exclusive discussions with Vodacom to sell 100 stake in South African entity, Neotel. Tata Communications is the majority shareholder in Neotel, with around 68.5% stake. (BS)
- ❖ Sharing the view of global experts on investment scenario in India, Chris Viehbacher, CEO of Sanofi, world's fourth largest pharmaceutical company believes government's recent moves such as retrospective taxation and tax issues with Vodafone have tarnished image of India in front of global investors. (BS)
- ❖ Vodafone India is planning to expand its data services to every village that has more than 5,000 residents. (BS)
- ❖ Bharti Airtel's shareholders have approved a proposal for selling the company's Data Centre and Managed Services business to its wholly-owned subsidiary Nxtra Data for about Rs 177 crore. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3521	(0.0006)	(0.04)
GBP-USD	1.6187	0.0001	0.01
USD-JPY	98.57	0.30	0.31

Bond Markets	Closing	Chg
10-yr bond	8.96	-9.6 bps
Interbank call	9.65	14.0 bps



Domestic News (Cont...)

❖ Analysts in India believe that key factors that impact the profitability of Indian software services exporters, namely uptick in demand, a weak rupee and cost controls at home, have come together favourably for the sector. While a large part of this is true, the key growth markets for India's IT exports, US and Europe, are not back to normal. In the first quarter, most players have reported healthy volume growth, but for any earnings upgrade analysts will look for more clarity. (BS)

❖ UBS upgrades Tech Mahindra to "buy" from "sell" and raises its target price to 1,650 rupees from 920 rupees, citing potential earnings upside, cheap valuations. (BS)

❖ SKS Microfinance Limited, the only listed microfinance institution (MFI) in the country, has concluded securitisation transaction for Rs 321 crore with a major public sector bank. (BS)

❖ Property consultant Jones Lang LaSalle India announced that Delhi-based real estate developers Alchemist Township India has purchased 2 million square feet of prime residential land from Highland Group at Kolkata Riverside, a satellite township development encompassing 262 acres being developed on the banks of the Hooghly River. (BS)

❖ Electrosteel Steels Ltd's application for restructuring of Rs 6,181.20 crores debt has been approved by Corporate Debt Restructuring team. (BS)

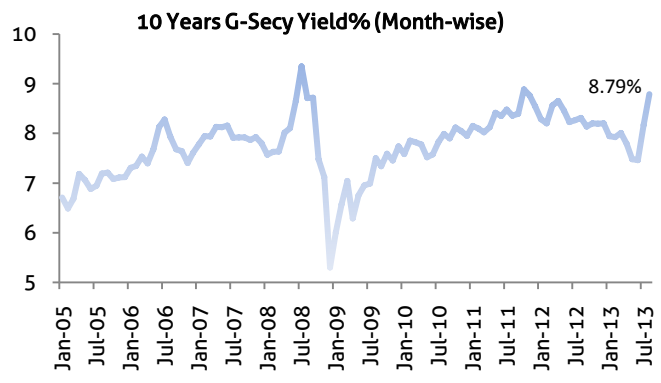
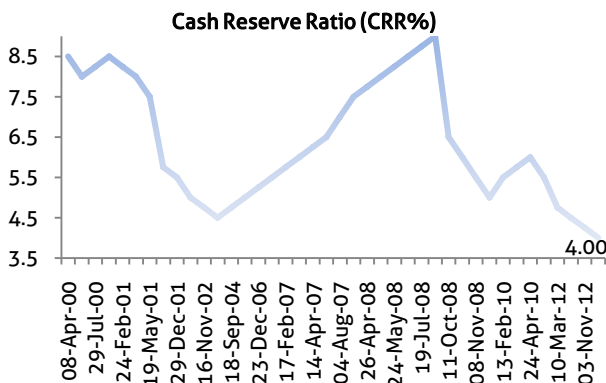
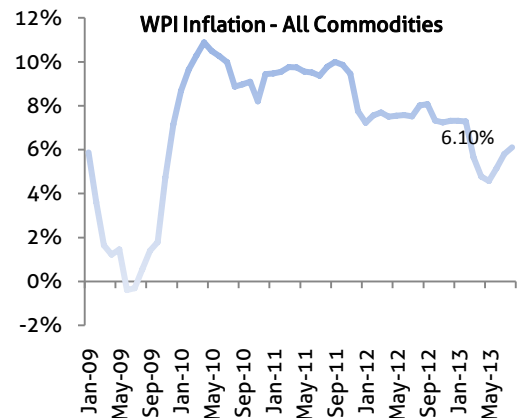
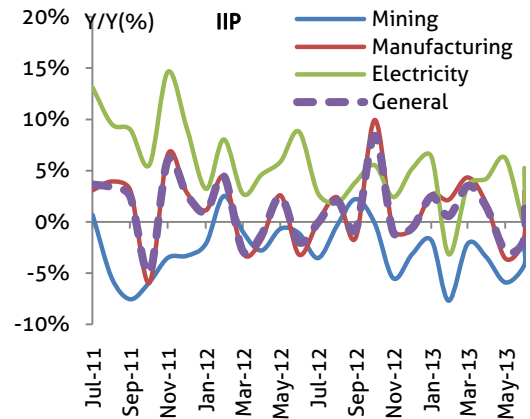
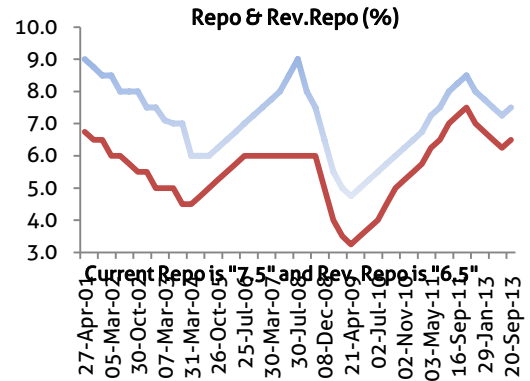
❖ Electricity regulator CERC will next month hear Reliance Power's petition seeking higher tariff from the proposed 4,000 MW ultra mega power project (UMPP) at Talaiya in Jharkhand. (BS)

❖ A consortium of Siemens AG and Siemens Ltd has received an order worth Rs 271 crores from state-owned Rashtriya Ispat Nigam Ltd, the former said in a notification to the stock exchanges. (BS)

❖ Glenmark Pharmaceuticals said it has received approval from the US health regulator for its generic Hydrocortisone Butyrate Cream used for treating variety of skin infections. (BS)

❖ Agro-chemical firm Crystal Crop Protection said it has signed an agreement with IARI to manufacture and sell solar-powered sprayer developed by the government agriculture research body. (BS)

❖ Indian companies have mopped up over Rs 4,800 crore so far this financial year through non-convertible debentures (NCDs) to retail investors, garnering nearly three times the amount that was actually targeted. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Sep-13	Gateway Distriparks Limit	MORGAN STANLEY ASIA (SINGAPORE) PTE	BUY	600000	104.48
30-Sep-13	Financial Technologies (I	QUADEYE SECURITIES PRIVATE LIMITED	SELL	356942	137.07
30-Sep-13	Financial Technologies (I	QUADEYE SECURITIES PRIVATE LIMITED	BUY	356942	136.85
30-Sep-13	ANG Industries Limited	CONSOLIDATED SECURITIES LIMITED	BUY	75000	7.3
30-Sep-13	ANG Industries Limited	HCP PETROCHEM PRIVATE LIMITED	SELL	75000	7.3

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Sep-13	Religare Enter	MEHTA & MEHTA REAL ESTATE PVT LTD	B	4,044,000	345
30-Sep-13	Jet Air India	TAIL WINDS LIMITED	S	960,369	345
30-Sep-13	CGCL	GAINFUL MULTITRADE PRIVATE LIMITED	S	575,600	115.71
30-Sep-13	Intec Cap	PANTEC DEVICES PVT LTD	B	69,090	106.81
30-Sep-13	Mediaone Global	BALRAJ KRISHAN GUPTA	B	101,510	43.18

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
530967	ARICENTINF	30-Sep-13	Stock Split from Rs. 10/- to Rs.5/-	01-Oct-13
533276	BS Ltd	30-Sep-13	BONUS 1:1	01-Oct-13
534734	ICVL Chem	30-Sep-13	Stock Split from Rs.10/- to Re.1/-	01-Oct-13
534733	ICVL Steels	30-Sep-13	Stock Split Rs.10/- to Re.1/-	01-Oct-13
534732	Intellivate Cap	30-Sep-13	Stock Split from Rs. 10/- to Re.1/-	01-Oct-13
506285	Bayer Crop	07-Oct-13	Buy Back of Shares	08-Oct-13
530059	Maharaja Shree-\$	09-Oct-13	Scheme of Arrangement	10-Oct-13
531228	Rander Corp	09-Oct-13	Stock Split from Rs. 10/- to Re. 1/-	10-Oct-13
503637	Dhanleela Inv	10-Oct-13	Stock Split from Rs. 10/- to Rs.2/-	12-Oct-13
500405	Supreme Petro	14-Oct-13	Dividend - Rs.2.50	-
500469	Federal Bank	17-Oct-13	Stock Split from Rs.10/- to Rs.2/-	18-Oct-13
500209	Infosys	17-Oct-13	Interim Dividend - Rs.-	18-Oct-13
500387	Shree Cement	17-Oct-13	Final Dividend - Rs.12.00	-
505729	Singer India	01-Nov-13	Dividend - Rs.1.50	-
500830	Colgate Palmolive	06-Nov-13	1st Interim Dividend - Rs.-	07-Nov-13
500459	Procter & Gamble	21-Nov-13	Final Dividend - Rs.25.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Sep-13	JPY	Industrial Production (MoM)		-0.40%	3.40%
30-Sep-13	CNY	Chinese HSBC Manufacturing PMI			51.2
30-Sep-13	USD	Chicago PMI		54	53
30-Sep-13	USD	Dallas Fed Mfg Business Index			5
01-Oct-13	JPY	Tankan Large Manufacturers Index		7	4
01-Oct-13	CNY	Chinese Manufacturing PMI		51.5	51
01-Oct-13	EUR	Manufacturing PMI		51.1	51.1
01-Oct-13	USD	Construction Spending (MoM)		0.40%	0.60%
01-Oct-13	USD	ISM Manufacturing Index		55	55.7
02-Oct-13	GBP	Construction PMI		59.2	59.1
02-Oct-13	EUR	PPI (MoM)		0.10%	0.30%
02-Oct-13	EUR	Interest Rate Decision		0.50%	0.50%
02-Oct-13	USD	ADP Nonfarm Employment Change		180K	176K
03-Oct-13	EUR	Services PMI		52.1	52.1
03-Oct-13	USD	Initial Jobless Claims		311K	305K
03-Oct-13	USD	Factory Orders (MoM)		0.30%	-2.40%
03-Oct-13	USD	ISM Non-Manufacturing Index		57.5	58.6
04-Oct-13	JPY	BOJ Target Rate			
04-Oct-13	USD	Nonfarm Payrolls		180K	169K
04-Oct-13	USD	Unemployment Rate		7.30%	7.30%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
30-Sep-13	INR	Indian Foreign Debt (USD)			390.00B
01-Oct-13	INR	HSBC Markit Manufacturing PMI			48.5
02-Oct-13	INR	Indian M3 Money Supply			12.60%
04-Oct-13	INR	Indian HSBC Services PMI			47.6
04-Oct-13	INR	Indian Bank Loan Growth			18.20%

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