

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5,899	0.97	CNX IT	6,526	(1.62)
Sensex	19,577	0.94	BANK NIFTY	11,715	0.84
DowJones	14,975	0.44	S&P CNX 500	4,572	1.36
Nasdaq	3,434	0.92	CNX FMCG	16,965	1.66
Hangseng	20,706	(0.47)	CNX REALTY	203	5.51
Shanghai	1,987	(0.41)	CNX AUTO	4,630	2.00
Nikkei	13,976	0.89	CNX ENERGY	8,154	1.94
Strait Times	3,159	0.56	CNX PHARMA	6,839	1.22
Kospi	1,855	(0.05)	Advances / Declines	BSE	NSE
Taiwan	8,043	0.09	Advances	1611	1009
FTSE	6,308	1.49	Declines	768	279
CAC	3,767	0.76	Unchanged	127	62
DAX	7,984	0.31	Total	2506	1350

Nifty Gainers		
Company	Price(Rs)	Chg(%)
RANBAXY	325.10	5.19
RELINFRA	367.00	5.10
DLF	189.10	4.33
SESAGOA	148.35	3.89
JPASSOCIAT	55.60	3.73

Nifty Losers		
Company	Price(Rs)	Chg(%)
INFY	2443.00	-2.24
HCLTECH	761.00	-1.93
TCS	1489.00	-1.92
ONGC	328.30	-0.85
SUNPHARMA	1004.45	-0.70

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
MAH HOLIDAY	10.01	0.18	57.03
Orissa Minerals Development	0.28	0.03	10.50
Bayer Crop	0.43	0.05	8.67
Mangalore Chem	13.70	2.09	6.55
Tata Comm	3.42	0.62	5.48

Indian Forex	Closing	Chg	% Chg
USD/INR	59.149	0.5505	0.92%
GBP/INR	90.0544	1.0888	1.19%
EUR/INR	77.066	0.91	1.17%
JPY/INR	59.48	1.01	1.67%

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	25,816	38
Silver (Rs/1kg)	40,286	(122)

Commodities	Price	% chg.
Crude (US\$/BBL)	97.9	(0.05)
Brent (US\$/BBL)	103.1	0.08
Gold (US/oz)	1,256.1	0.28
Silver (US\$/oz)	19.7	0.12
Copper (US\$/MT)	6,917.0	3.71
Alum (US\$/MT)	1,754.0	3.14
Zinc(US\$/MT)	1,833.0	2.03

ADR	Cl. Values	% Chg.
ICICI Bank	38.96	1.86
HDFC Bank	36.11	(0.36)
Infosys	41.03	(0.39)
Sterlite Inds.	5.90	1.03
Dr Reddy's Labs	38.05	0.61
Wipro	7.33	0.69
Tata Motors	24.32	3.75

Market Sensor

U.S market eased off their best levels but still kicked off the first day of the third quarter with a modest rally, boosted by a pair of better-than-expected economic reports. Dow Jones Industrial Average was up 0.44% or 65.36 points at 14974.96. Nasdaq Composite was up 0.92% or 31.24 points at 3434.49. Standard & Poor's 500 was up 0.54% or 8.68 points at 1614.96.

Indian market surged for the third consecutive day in a row as appreciation of rupee by 1% boosted market sentiment. Nifty ended the previous trading session with a gain of 0.97% or 56.65 points at 5898.85. On Friday's trading session, FIIs sold net Rs.1.47 Cr in cash market and bought net Rs 1100.01 Cr. in derivative segment. Whereas, DII bought net Rs. 213.6 Cr in cash segment.

Coming to today's trade, Market to remain volatile with stiff resistance is seen at 5930 followed by 5970.

Global News

- ❖ Emerging-market stocks capped the longest rally since March, currencies gained and bond yields retreated, as a rebound in U.S. manufacturing bolstered optimism that global economic growth will pick up. (Bloomberg)
- ❖ American manufacturing rebounded in June as orders picked up, while factory reports from Japan to the U.K. pointed to stabilization in the global economy. (Bloomberg)
- ❖ Hedge funds cut wagers on a gold rally to a five-year low as a record quarterly drop drove prices below \$1,200 an ounce for the first time since 2010 and Goldman Sachs Group Inc. forecast more declines. (Bloomberg)
- ❖ Thirteen of the world's biggest investment banks were accused by the European Union of colluding to curb competition in the \$10 trillion credit derivatives industry. (Bloomberg)
- ❖ China said it started anti-dumping and anti-subsidy probes on wines imported from the European Union following a request from domestic producers. (Bloomberg)

Economic News

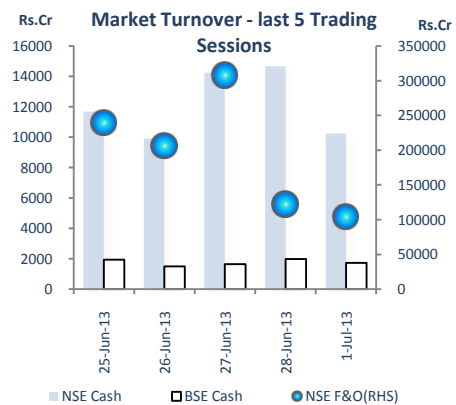
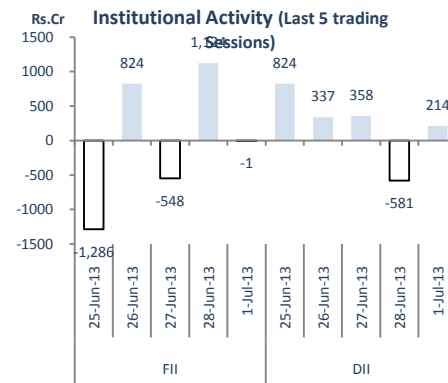
- ❖ There would be no increase in train fares during the 2013-14 fiscal despite rising diesel price, Railway Minister Mallikarjun Kharge said Monday. (BS)
- ❖ The India-China trade deficit increased by 34% to reach \$12 billion in the first five months of the year, presenting a bleak picture for Indian exports as bilateral trade continued to decline, denting hopes of achieving a trade volume of \$100 billion by 2015. (BS)
- ❖ While markets are upbeat over the government decision to nearly double the price of domestically produced natural gas, industry wants it to clearly lay the roadmap for free market pricing regime. (BS)
- ❖ With rupee falling to new lows, losses on diesel and cooking fuel have widened to their highest levels this year, upsetting the government's subsidy maths. (BS)
- ❖ The Central Electricity Regulatory Commission (CERC) has proposed the introduction of region wise tariff instead of individual project or element wise tariff in a bid to simplify working of the tariff determination. (BS)
- ❖ A high-powered ministerial panel is likely to meet on July 17 to consider abolishing the priority ranking in natural gas allocation so that fuel currently consumed by urea plants can also be diverted to fuel-starved power plants. (BS)
- ❖ The cash-strapped West Bengal government seems to have found an answer to the rising losses of the state PSUs in unlocking idle land held by such entities. (BS)

Domestic News

- ❖ Global credit rating agency Moody's Investors Service has downgraded the outlook on India's largest private power producer Tata Power Company (TPC) to negative from stable. (BS)
- ❖ In order to keep the much-hyped Ethanol Blending Programme (EBP) by the Centre on track, the ministry of petroleum and natural gas has asked the oil marketing companies to float another tender this month to meet the additional requirement of about 60 litres from suppliers. (BS)
- ❖ In an effort to cash in on the growing consumption of coffee in the domestic market, the Bangalore-based Tata Coffee is looking at vending solutions to offer innovative products and services. (BS)
- ❖ Reliance Communications (RCom) said it has completed full repayment of two syndicated external commercial borrowing (ECB) loan of \$500 million each, amounting to \$1 billion (about Rs 6,000 crore), during the quarter ended June 30, 2013. (BS)
- ❖ The company availed the two loans in 2007 from a group of international banks, and has repayments have been from RCom's rupee resources, the company said in a statement. (BS)
- ❖ Swedish commercial vehicles maker Scania said it has bagged an order to supply 120 premium buses to Siddhi Vinayak Logistics over the next one year. (BS)
- ❖ Two-wheeler manufacturer Honda Motorcycle & Scooter India (HMSI) reported 11.09% growth in its total sales for June 2013 at 2,52,114 units. (BS)
- ❖ Mahindra & Mahindra Ltd's Farm Equipment Sector (FES) said its tractor sales increased by 18.8% to 26,723 units in the domestic market in June. (BS)
- ❖ Auto maker VE Commercial Vehicles (VECV) reported 18.75% decline in total sales of Eicher branded products at 3,302 units in June 2013. (BS)
- ❖ Infosys is expected to cut 2013-14 revenue guidance to 4-6% as wage hikes and higher costs are hitting its margins, offsetting the benefits of rupee depreciation, says a Morgan Stanley report. (BS)
- ❖ Tata Global Beverages has acquired an additional 10.59% stake in Kanan Devan Hills Plantations Company Private Ltd (KDHP), a division it hived off in 2005. (BS)

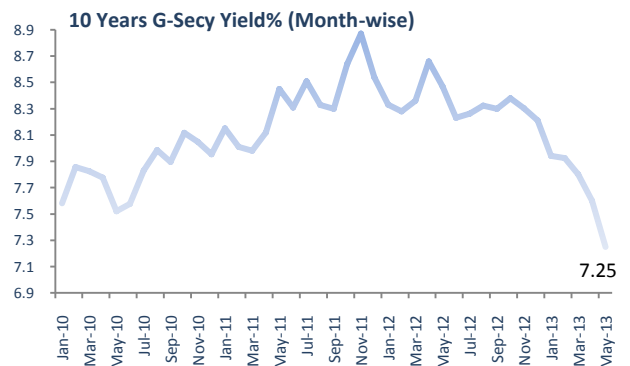
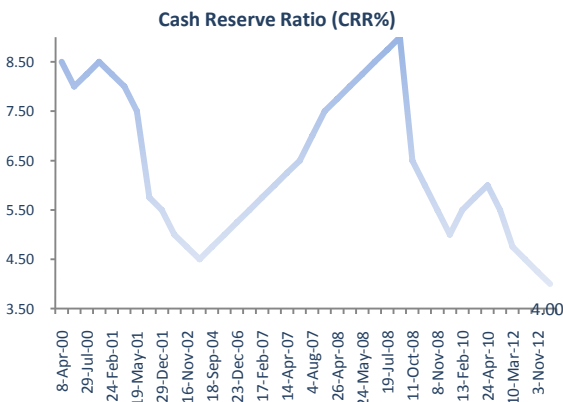
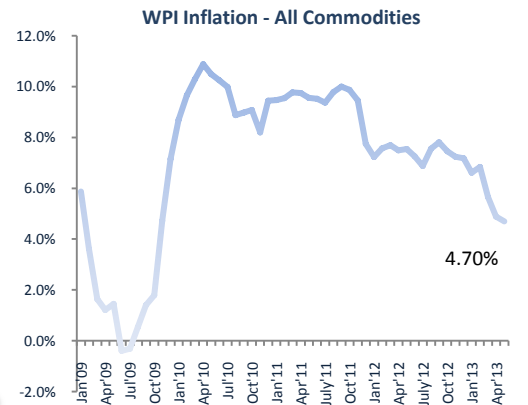
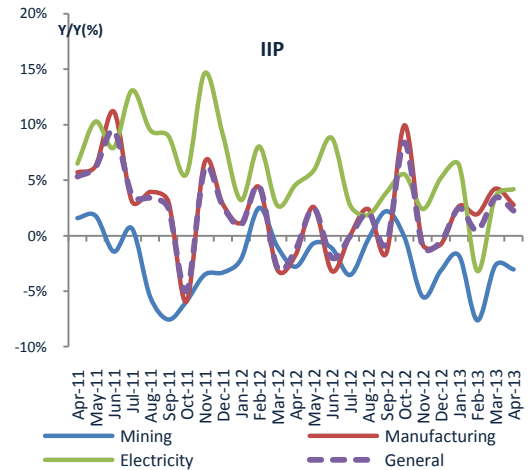
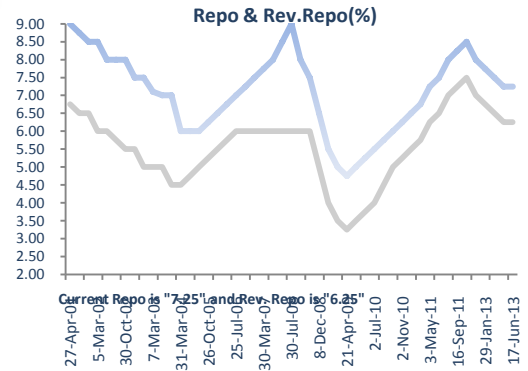
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3054	-0.001	-0.08
GBP-USD	1.5208	-0.0008	-0.06
USD-JPY	99.61	-0.05	-0.05

Bond Markets	Closing	Chg
10-yr bond	7.58	-2.2 bps
Interbank call	7.27	11.0 bps



Domestic News(Conti..)

- ❖ The Bombay High court has postponed the hearing in the family feud between YES Bank promoters over the composition of the board to 5th July. (BS)
- ❖ Brahmaputra Infrastructure said a consortium led by it has won Rs 5,338.42-crore contract from power major NTPC to develop and operate coal mines in Jharkhand. (BS)
- ❖ Honda Cars India Ltd (HCIL) reported over three-fold increase in its domestic sales for June 2013 at 9,297 units. (BS)
- ❖ Tata Motors reported 18.08% decline in total vehicle sales at 52,708 units in June 2013. (BS)
- ❖ Auto-maker Mahindra & Mahindra reported 7.81% decrease in its total sales at 38,092 units in June, 2013. (BS)
- ❖ Liberty Shoes Ltd said it is eyeing 25% growth in sales in the current financial year on the back retail expansion. (BS)
- ❖ Eight MoUs worth \$ 75 million were signed between Indian firms and Bangladesh companies in Chennai. The MoUs were across sectors including textile, finance, plastic, infrastructure, IT & technology, software development and manufacturing. The MoUs were signed by corporates at India-Bangladesh Investor's Meet organised by the Confederation of Indian Industry (CII). (BS)
- ❖ The State Bank of India said the nation's largest lender has had a "fairly reasonable" growth in auto and home loans so far this fiscal. (BS)
- ❖ Utility vehicles leader Mahindra and Mahindra announced a nominal 0.5% price hike across all models, except for the premium sports utility vehicles XUV 500 and the Rexton from its Korean arm, despite falling sales, which dipped nearly 8% in June(BS).
- ❖ Dr Reddy's Laboratories Limited has announced the launch two separate online repositories dedicated to lung cancer and breast cancer with extensive information, insights and studies on these cancers and their treatment for the benefit of doctors as well as the common citizens in th country. (BS)
- ❖ Construction major Larsen & Toubro said its June order book touched Rs 3,057 crore across various business segments. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Jul-13	Housing Development and I	ALIVE CONSULTANTS ALIVE	BUY	2180873	41.09
1-Jul-13	Mangalore Chemicals & Fer	ROBUST MARKETING SERVICES PVT LTD	BUY	1014691	54.52
1-Jul-13	IVRCL Limited	TRANSGLOBAL SECURITIES LTD.	BUY	2137231	16.41
1-Jul-13	Texmo Pipe & Products Ltd	ANANDSAGAR MERCHANT AND SERVICES PRIVATE LIMITED	BUY	125453	3.85
1-Jul-13	Texmo Pipe & Products Ltd	HIGHBLUESKY EMERGING MARKET FUND	SELL	125000	3.8

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Jul-13	MAH HOLIDAY	BNP PARIBAS ARBITRAGE	B	825000	246.15
1-Jul-13	Accel Front	BOGHARA POLYFAB PVT LTD	B	800000	23.5
1-Jul-13	Valuemart Info	RINKU DESHPANDE	B	633919	4.05
1-Jul-13	Sawaca Bsns	SS CORPORATE SECURITIES LIMITED	S	100000	19.56
1-Jul-13	Texmo Pipes	KBC ALDINI CAPITAL MAURITIUS LIMITED	S	125000	3.8

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
533150	GODREJ PROP	2-Jul-13	Dividend - Rs.4.00	-
504840	Kaira Can	2-Jul-13	Final Dividend - Rs.5.00	-
590071	Sundaram Fin	2-Jul-13	Final Dividend - Rs.4.50	-
513010	Tata Sponge	2-Jul-13	Dividend - Rs.8.00	-
530117	Adi Finechem	3-Jul-13	BONUS 1:10	4-Jul-13
533271	Ashoka Buildcon	3-Jul-13	BONUS 1:2	4-Jul-13
533271	Ashoka Buildcon	3-Jul-13	Stock Split from Rs. 10/- to Rs. 5/-	4-Jul-13
501150	Centrum Cap	3-Jul-13	BONUS 5:1	4-Jul-13
501150	Centrum Cap	3-Jul-13	Stock Split from Rs.10/- to Re.1/-	4-Jul-13
533289	Kesar Terminals	3-Jul-13	Dividend - Rs.3.00	-
532924	Kolte Patil	3-Jul-13	Final Dividend - Rs.1.50	-
532366	PNB Gilts	3-Jul-13	BONUS 1:3	-
505807	Rolcon Engr	3-Jul-13	Dividend - Rs.3.00	-
517506	TTK Prestige	3-Jul-13	Dividend - Rs.17.50	-
523537	APM Inds-₹	4-Jul-13	Final Dividend - Rs.1.00	-
500477	Ashok Leyland	4-Jul-13	Dividend - Rs.0.60	-
531795	Atul Auto-₹	4-Jul-13	Final Dividend - Rs.6.00	-
532977	Bajaj Auto	4-Jul-13	Dividend - Rs.45.00	-
532978	Bajaj Finserv	4-Jul-13	Dividend - Rs.1.50	-
500490	Bajaj Holdings	4-Jul-13	Dividend - Rs.25.00	-
500034	BAJFINANCE	4-Jul-13	Dividend - Rs.15.00	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
1-Jul-13	CNY	Chinese Manufacturing PMI		50	50.8
1-Jul-13	EUR	Manufacturing PMI		48.7	48.7
1-Jul-13	EUR	Unemployment Rate		12.30%	12.20%
1-Jul-13	USD	Manufacturing PMI			52.2
1-Jul-13	USD	Construction Spending (MoM)		0.60%	0.40%
1-Jul-13	USD	ISM Manufacturing Index		50.5	49
2-Jul-13	GBP	Construction PMI		51.1	50.8
2-Jul-13	USD	Factory Orders (MoM)		2.00%	1.00%
3-Jul-13	CNY	Chinese HSBC Services PMI			51.2
3-Jul-13	USD	ADP Nonfarm Employment Change		160K	135K
3-Jul-13	USD	Initial Jobless Claims		345K	346K
3-Jul-13	USD	Trade Balance		-40.1B	-40.3B
3-Jul-13	USD	ISM Non-Manufacturing Index		54	53.7
4-Jul-13	GBP	BoE QE Total		375B	375B
4-Jul-13	GBP	Interest Rate Decision		0.50%	0.50%
4-Jul-13	EUR	Interest Rate Decision		0.50%	0.50%
5-Jul-13	USD	Nonfarm Payrolls		166K	175K
5-Jul-13	USD	Unemployment Rate		7.50%	7.60%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
1-Jul-13	INR	HSBC Markit Manufacturing PMI			50.1
3-Jul-13	INR	Indian HSBC Services PMI			53.6

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