

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5728	(0.25)	CNX IT	7777	(0.13)
Sensex	19317	(0.15)	BANK NIFTY	10143	1.27
DowJones	15628	0.83	S&P CNX 500	4354	(0.59)
Nasdaq	3676	1.36	CNX FMCG	17435	(0.26)
Hangseng	22205	0.52	CNX REALTY	160	(4.36)
Shanghai	2035	0.31	CNX AUTO	4412	(1.40)
Nikkei	14208	1.44	CNX ENERGY	7550	(2.16)
Strait Times	3251	0.23	CNX PHARMA	7102	(0.08)
Kospi	1930	0.48	Advances / Declines	BSE	NSE
Taiwan	8131	0.93	Advances	761	348
FTSE	6682	0.92	Declines	1461	837
CAC	4043	1.25	Unchanged	133	46
DAX	8411	1.63	Total	2355	1231

Nifty Gainers		
Company	Price(Rs)	Chg(%)
AXISBANK	1092.70	5.62
HDFCBANK	633.20	3.85
HINDUNILVR	632.10	3.19
KOTAKBANK	668.25	2.44
POWERGRID	103.35	2.23

Nifty Losers		
Company	Price(Rs)	Chg(%)
JPASSOCIAT	32.60	(9.82)
BANKBARODA	513.25	(8.61)
DLF	137.05	(8.51)
RANBAXY	262.75	(8.29)
BPCL	303.70	(6.19)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Financial Tech	62.54	7.81	8.01
Religare Enter	7.61	1.03	7.39
ACC	9.53	1.34	7.13
IRB Infra	64.01	9.32	6.87
Triveni Turbine	18.16	2.78	6.54

Indian Forex	Closing	Chg	% Chg
USD/INR	60.7423	(0.3727)	(0.61)
GBP/INR	92.0550	(0.9192)	(0.99)
EUR/INR	80.6025	(0.3510)	(0.43)
JPY/INR	61.6900	(0.7500)	(1.20)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28310	(405)
Silver (Rs/1kg)	41430	(699)

Commodities	Price	% chg.
Crude (US\$/BBL)	108.4	2.75
Brent (US\$/BBL)	109.9	1.80
Gold (US/oz)	1306.9	(1.43)
Silver (US\$/oz)	19.6	(0.51)
Copper (US\$/MT)	6999.0	2.85
Alum (US\$/MT)	1776.5	2.57
Zinc(US\$/MT)	1822.5	1.65

ADR	Cl. Values	% Chg.
ICICI Bank	33.06	0.28
HDFC Bank	33.69	0.79
Infosys	49.82	0.14
Sterlite Inds.	5.10	0.07
Dr Reddy's Labs	37.26	(0.01)
Wipro	8.79	0.17
Tata Motors	23.95	(0.09)

Market Sensor

U.S market soared to set fresh closing highs on the first day of August, propelling the S&P 500 above the 1,700 mark for the first time, as Wall Street cheered a round of upbeat economic data and ahead of the widely-watched government jobs report. Dow Jones Industrial Average was up 0.83% or 128.48 points at 15628.02. Nasdaq Composite was up 1.36% or 49.37 points at 3675.74. Standard & Poor's 500 was up 1.25% or 21.14 points at 1706.87.

Indian markets witnessed yet another volatile trading session ending in red as poor manufacturing PMI data dampened sentiment despite rally in global markets. Nifty ended the previous trading session with a decline of 0.25% or 14.15 points at 5727.85. On Friday's trading session, FIIs bought net Rs.177.78 Cr in cash market and bought net Rs 1164.30 in derivative segment. Whereas, DII sold net Rs.293.62 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 5780.

Global News

❖ China's exchange rate is undervalued by 5 percent to 10 percent on an inflation-adjusted basis given the fundamentals of the country's economy, International Monetary Fund staff said in a report released yesterday. (Bloomberg)

❖ Manufacturing expanded in July at the fastest pace in more than two years, sparked by surges in orders and production that signal companies are growing more optimistic about the U.S. economy's prospects. (Bloomberg)

❖ Construction spending in the U.S. unexpectedly dropped in June for the first time in three months, easing off an almost four-year high amid government cutbacks. (Bloomberg)

❖ European Central Bank President Mario Draghi said economic indicators signal the euro region is past the worst of its longest-ever recession, while reiterating that interest rates will stay low for the foreseeable future. (Bloomberg)

Economic News

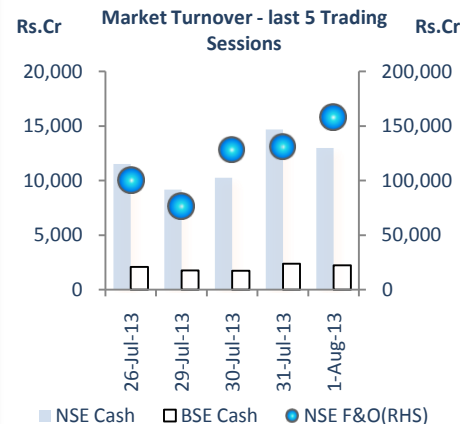
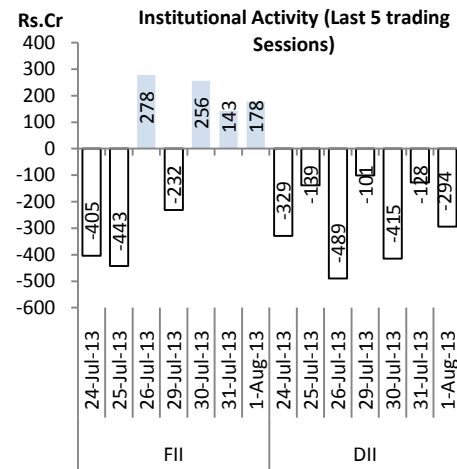
- ❖The Power Ministry plans to make it compulsory for distribution companies to purchase certain percentage of their energy requirements from hydel sources.(BS)
- ❖In yet another step to rescue battered rupee, the Reserve Bank tightened hedging rules by making it mandatory for foreign institutional investors to obtain consent of holders of participatory note (P-Note) and derivative instruments before hedging. (BS)
- ❖The Reserve Bank did not give any time-frame for roll-back of liquidity tightening measures and said that they would remain in force till stability is achieved in the foreign exchange market. (BS)
- ❖A High-Power Committee, headed by Cabinet Secretary Ajit Kumar Seth, may take a final call this month on proposed new norms to provide greater operational flexibility to PSUs in achieving their annual targets. (BS)
- ❖The high level advisory panel headed by Power Minister Jyotiraditya Scindia, which is looking into various problems faced by the sector, will meet on August 14. (BS)
- ❖Faced with massive coal shortages, which has hampered India's power production, the Planning Commission is likely to call a full-fledged meeting of the National Development Council (NDC), represented by all-states and union territories to sort out issues related to coal linkages and shortages. (BS)
- ❖The infrastructure sector's output growth in June was a near-static 0.1 per cent against 7.9 per cent in June 2012, according to data issued by the ministry of commerce and industry. This may pull down industrial production in June since the core sector has almost 38 per cent weight in the Index of Industrial Production (IIP). Industrial production contracted 1.6 per cent in May. (BS)
- ❖The government is likely to go ahead with its proposed 5% stake sale in Coal India this month that is expected to fetch around Rs 10,000 crore to the exchequer, after major trade unions reached an agreement on the quantum of disinvestment. (BS)
- ❖In a strong message to states, Union Power Minister Jyotiraditya Scindia said they should take the liability of electricity subsidies on their balance sheets instead of burdening the distribution companies. (BS)

Domestic News

- ❖Karnataka Bank reported 12.8% rise in net profit at Rs 94.17 crore for its first quarter ended June 30.(BS)
- ❖The project monitoring group of the Cabinet secretariat will vet the progress of 22 large projects in Odisha across sectors like coal, mining, steel, petrochemicals, Railways and power on Friday (BS)
- ❖Diageo, the global spirits major which recently acquired management control of India's largest spirits company – United Spirits, has kicked off integration process in right earnest within weeks after coming on board during early July..(BS)
- ❖Having bagged four coal blocks from the government last month, state-run power major NTPC said it expects to produce nearly 100 million tonne coal over the next 5 to 6 years.. (BS)
- ❖Nitin Paranjpe, MD & CEO of the largest consumer goods company in the country, Hindustan Unilever (HUL), was unequivocal when he indicated that the rate of growth of the Rs 1.8 lakh-crore FMCG market in India was slowing..(BS)

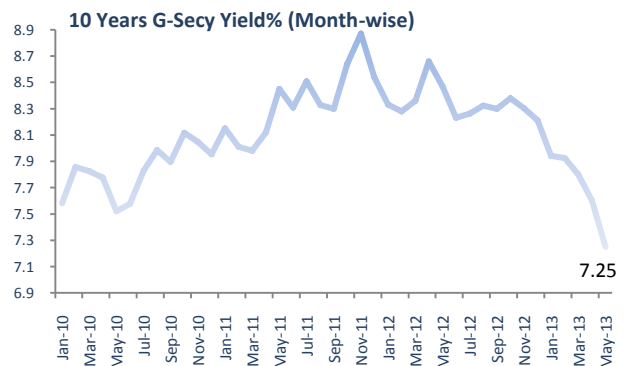
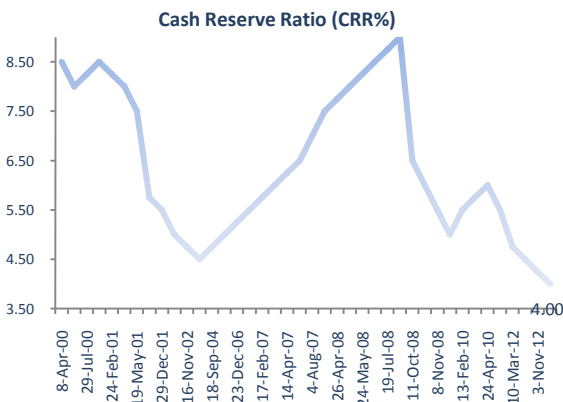
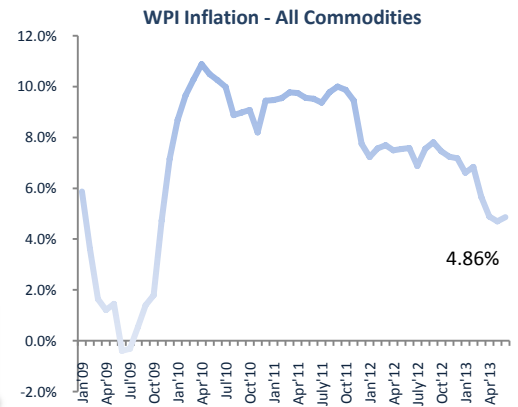
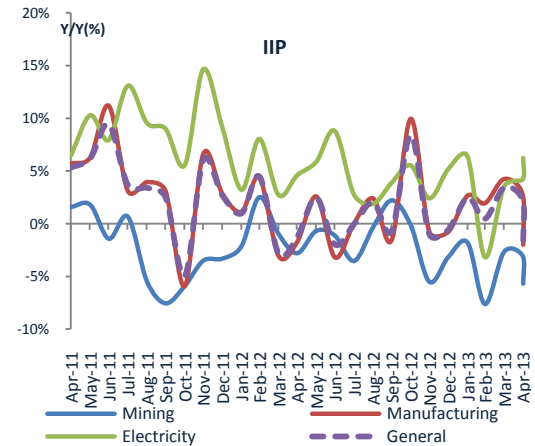
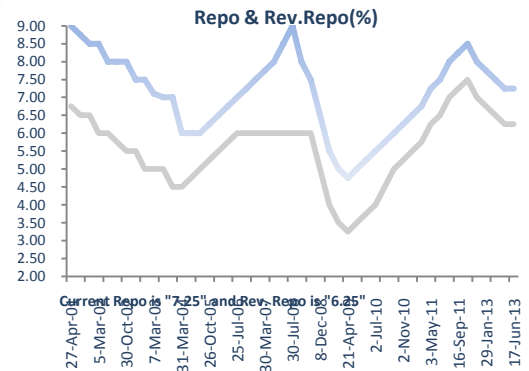
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3208	0.0002	0.01
GBP-USD	1.5117	(0.0003)	(0.02)
USD-JPY	99.40	(0.14)	(0.14)

Bond Markets	Closing	Chg
10-yr bond	8.42	-12.2 bps
Interbank call	8.84	-81.0 bps



Domestic News(Conti..)

- ❖ Utility vehicle market leader Mahindra & Mahindra (M&M) has decided to extend production holidays in the coming months too as retail demand hits new lows every day.(BS)
- ❖ The state owned Odisha Mining Corporation (OMC) sitting on a cash surplus of over Rs 5000 crore, is likely to finance land acquisition cost for the Rs 8000-crore common coal corridor project proposed in the Angul-Chhendipada-Talcher belt (BS)
- ❖ Auto maker VE Commercial Vehicles reported 12.54% decline in total sales of Eicher branded products at 3,150 units in July 2013 (BS)
- ❖ State-run telecom company MTNL said it has received tax refunds of Rs 623.18 crore for the assessment year 2006-07.(BS)
- ❖ Two-wheeler manufacturer Honda Motorcycle & Scooter India reported 20.11% growth in sales at 2,87,177 units for July 2013.(BS)
- ❖ Mafatlal Industries, the flagship company of Arvind Mafatlal Group, said its net profit for the quarter ended June 2013 jumped to Rs 13.05 crore as against Rs 4.13 crore in the same period last year (BS)
- ❖ Kotak Mahindra Bank is planning to open 100 new branches across the country in the current fiscal year, according to a top executive (BS)
- ❖ Telecom operator Idea Cellular said it has nearly doubled consolidated net profit at Rs 462.71 crore in the first quarter ended June 30, 2013, on the back of robust voice and mobile data revenue.(BS)
- ❖ Jubilant Life Sciences said its net loss widened to Rs 105.88 crore for the first quarter ended June 30, 2013 (BS)
- ❖ Reliance Communications reported a 33.33% drop in its net profit at Rs 108 crore for the first quarter ended June 30, 2013. (BS)
- ❖ Following much hype and speculation, Zee Entertainment Enterprises Ltd (ZEEL) has finally announced its new Hindi movie channel. The channel called '&pictures' will be launched next month and will be a vehicle for Bollywood premiers on television.(BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Aug-13	Financial Technologies (I	RELIANCE CAPITAL TRUSTEE CO LTD A/C RELIANCE GROWTH FUND	SELL	780925	213.73
1-Aug-13	Vivimed Labs Limited	KARVY FINANCIAL SERVICES LIMITED	SELL	100000	96.05
1-Aug-13	Saregama India Ltd.	ADAPT INVESTMENTS LTD	BUY	150000	53.89
1-Aug-13	Texmo Pipe & Products Ltd	GYANSHEELA MARKETING PRIVATE LIMITED	BUY	321667	3.9
1-Aug-13	Nucent Finance Limited	SHREE AERAN MARKETING PRIVATE LIMITED	BUY	80000	12.48

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Aug-13	IRB Infra	MERRILL LYNCH CAPITAL MARKETS ESPANA SA SV	S	3032845	54.16
1-Aug-13	Triveni Turbine	NALANDA INDIA EQUITY FUND LIMITED	B	1809500	49.98
1-Aug-13	Financial Tech	RELIANCE CAPITAL TRUSTEE CO. LTD A/C RELIANCE GROWTH FUND	S	410530	211.89
1-Aug-13	Parikh Herbals	CHP FINANCE PRIVATE LIMITED	S	600000	18.2
1-Aug-13	Vivimed Labs	FINANCIAL KARVY FINANCIAL SERVICES LIMITED	S	100000	96

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532749	Allcargo Logistics	2-Aug-13	Dividend - Rs.1.50	-
507525	Amrit Corp-\$	2-Aug-13	Dividend - Rs.4.00	-
590006	Amrutanjan Health-\$	2-Aug-13	Final Dividend - Rs.2.00	-
509438	Benares Hotels	2-Aug-13	Dividend - Rs.20.00	-
531862	Bharat Agri	2-Aug-13	Final Dividend - Rs.1.50	-
509472	Cravatex	2-Aug-13	Dividend - Rs.3.50	-
526783	Dr Agarwals-\$	2-Aug-13	Final Dividend - Rs.1.20	-
533208	Emami Paper	2-Aug-13	Dividend - Rs.0.60	-
526797	Greenply Inds	2-Aug-13	Dividend - Rs.3.00	-
504036	Hind Rectifiers	2-Aug-13	Dividend - Rs.1.60	-
520066	Jay Bharat Marut	2-Aug-13	Dividend - Rs.1.50	-
532621	Morarjee Tex	2-Aug-13	Dividend - Rs.1.75	-
532097	Mukand Engr	2-Aug-13	Dividend - Rs.1.00	-
533317	Omkar Speciality	2-Aug-13	Dividend - Rs.1.50	-
526671	PL Enterprises	2-Aug-13	Consolidation of Shares	16-Aug-13
526671	PL Enterprises	2-Aug-13	Reduction of Capital	-
532735	R Systems	2-Aug-13	Interim Dividend - Rs.2.50	5-Aug-13
513369	Rajkumar Forge	2-Aug-13	Dividend - Rs.1.50	-
500113	SAIL	2-Aug-13	Final Dividend - Rs.0.40	-
523116	Sanco Trans	2-Aug-13	Dividend - Rs.2.70	-
530419	Sumedha Fisc	2-Aug-13	Dividend - Rs.0.50	-

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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