

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8028	0.92	CNX IT	10705	0.24
Sensex	26868	0.86	BANK NIFTY	16013	1.73
DowJones	17098	0.11	S&P CNX 500	6438	1.22
Nasdaq	4580	0.50	CNX FMCG	19173	(0.70)
Hangseng	24701	(0.21)	CNX REALTY	3571	2.45
Shanghai	2242	0.27	CNX AUTO	7789	1.38
Nikkei	15676	1.29	CNX ENERGY	9810	1.88
Strait Times	3315	0.04	CNX PHARMA	10099	0.17
Kospi	2053	(0.73)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9443	(0.73)	Advances	1923	1104
FTSE	6825	0.08	Declines	1010	466
CAC	4380	(0.03)	Unchanged	137	57
DAX	9479	0.09	Total	3070	1627

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HEROMOTOCO	2773.00	6.46
JINDALSTEL	247.90	6.39
MARUTI	2927.60	5.14
INDUSINDBK	614.00	4.88
TATAPOWER	90.45	4.45

Nifty Losers		
Company	Price(Rs)	Chg(%)
SUNPHARMA	841.95	(1.56)
ITC	350.15	(1.45)
HDFC	1059.25	(1.42)
BHEL	238.50	(1.00)
TATAMOTORS	520.70	(0.83)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
ECLERX	1.17	0.0	29
DBCORP	1.55	0.1	21
RADICO	11.42	0.6	19
ABB	0.93	0.1	15
VIPIND	11.35	1.1	11

Indian Forex	Closing	Chg	% Chg
USD/INR	60.474	(0.001)	(0.00)
GBP/INR	100.428	0.077	0.08
EUR/INR	79.396	(0.466)	(0.58)
JPY/INR	58.060	(0.210)	(0.36)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27920	(154)
Silver (Rs/1kg)	42181	(534)

Commodities	Price	% Chg.
Crude (US\$/BBL)	95.9	0.06
Brent (US\$/BBL)	102.8	(0.43)
Gold (US/oz)	1283.6	(0.28)
Silver (US\$/oz)	19.5	(0.15)
Copper (US\$/MT)	6966.5	(0.41)
Alum (US\$/MT)	2082.0	(1.51)
Zinc(US\$/MT)	2350.5	(0.36)

ADR	Cl. Values	% Chg.
ICICI Bank	53.50	0.45
HDFC Bank	49.69	0.74
Infosys	59.50	0.24
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	49.01	(0.15)
Wipro	11.96	(0.04)
Tata Motors	48.19	0.62

## Market Sensor

Most major countries bourses closed flat to down and volumes were light because of U.S. markets being shut for Labor Day. The conflicting pressures on markets from political and economic matters are very much in evidence with Markit's purchasing managers' index (PMI) fell to 50.7, down from 51.8 in July and Geopolitical issues are headed up by the situation in Ukraine.

Indian equity market Key benchmark indices edged higher on the back of positive GDP Data in the first quarter of current financial year (Q1 June2014), which showed signs of recovery in economic growth. The markets became all the more positive when verdict of Supreme Court came on coal mines allocation. Nifty ended the previous trading session with a gain of 0.92% or 73.35 points at 8027.70. On Monday's trading session, Fills bought net Rs.554.14 Cr in cash market and bought net Rs.2175.87 in derivative segment. Whereas, DII sold net Rs.561.69 Cr in cash segment.

**Coming to today's trade crucial intraday support seen at 7980 followed by 7940 while resistance exist at 8060 and then at 8100.**

## Global News

❖ President Vladimir Putin faces possible further curbs on debt sales and access to technology as European Union regulators review the arsenal of measures at their disposal to sanction Russia.(Bloomberg)

❖ U.K. factory growth slowed more than forecast last month and Italian manufacturing shrank as Europe suffered the fallout from weakening demand and mounting geopolitical risks. (Bloomberg)

❖ Europe is in the throes of a critical debate about whether it should embark on an American-style quantitative easing program and is looking to the U.S. for answers about how and if the measure would work on the Continent.(CNBC)

❖ Factory activity in Europe and Asia cooled in August after a strong July, as new orders dwindled in the face of escalating tensions in Ukraine and a patchy recovery in China, purchasing managers indexes showed.(Reuters)

❖ South Korea's annual inflation in August eased to its lowest in five months, data on Tuesday showed, giving the central bank sufficient headroom to cut interest rates again to spur economic growth. (Reuters)

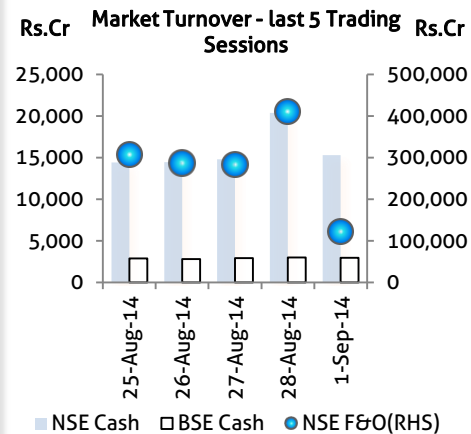
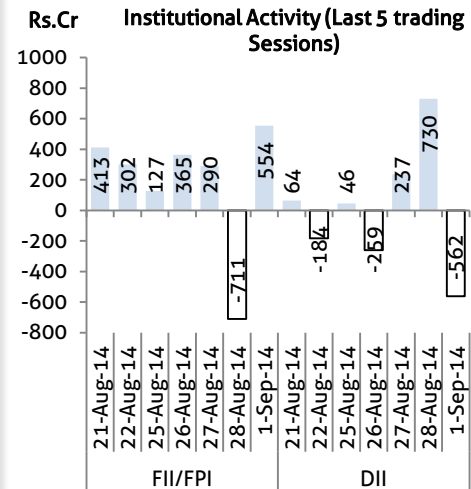
## Economic News

- ❖ Negative growth in crude oil, natural gas, refinery products, fertilisers and steel has pulled down the growth of the eightcore industries to 2.7% in July.(BS)
- ❖ Pledging to enhance bilateral cooperation, Japan promised \$35 billion assistance to India for the next five years towards funding next generation infrastructure projects, smart cities, rejuvenation of Ganga river and introduction of bullet trains. (BS)
- ❖ If there is one sector where the Narendra Modi government seems to have assured investors of policy continuity, it is the petroleum sector. The performance of the petroleum and natural gas ministry, under Dharmendra Pradhan, in the first 100 days of the government has been more of policy stability than of innovation. (BS)
- ❖ The decision of the Chinese Government to spend 10% more on farm subsidies instead of fixing higher price of crops is likely to spur yarn production in China and cotton will be available to Chinese Spinning Mills at a cheaper price now. This may have an adverse impact on Indian spinning mills catering to the Chinese market. (BS)
- ❖ Prime Minister Narendra Modi on Monday said Japan will invest \$33.5 billion in infra projects over a period of 5 years to build smart cities and infra projects. The East Asian nation will also provide technical and financial support for bullet trains in India. (BS)
- ❖ The Attorney General proposed to the Supreme Court on Monday that about 46 of the 216 coal mines it declared illegal should not be taken back from the companies that operate them as they were either producing or were close to producing. (BS)
- ❖ Amid fall in sowing area and below normal monsoon reported in this kharif season so far, urea imports have decreased by 54 per cent to 2.03 million tonnes in the first five months of 2014-15. (BS)
- ❖ As Prime Minister Narendra Modi promised speedy clearances for Japanese investments, ICICI Bank chief Chanda Kochhar said India can get billions of dollars of fresh investments from Japan. (BS)
- ❖ Encouraged by economic growth of 5.7% in the first quarter, 2014-15, Prime Minister Narendra Modi said it has generated a "huge positive sentiment" while exhorting Japanese businessmen to invest in India. (BS)
- ❖ A special court asked the CBI to clarify whether 'rule of law' was followed in allocation of coal blocks to top industrialist Kumar Mangalam Birla's Hindalco. (BS)

## Domestic News

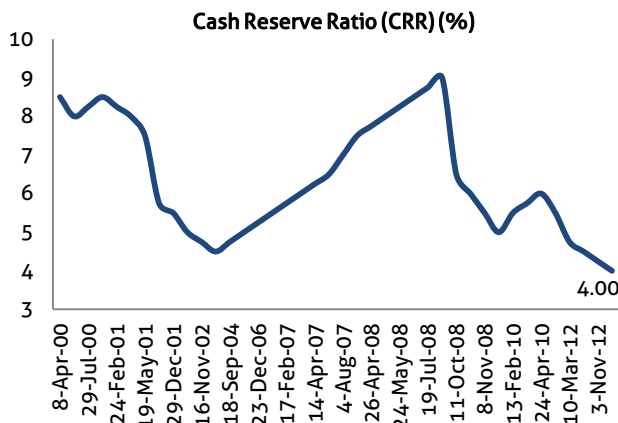
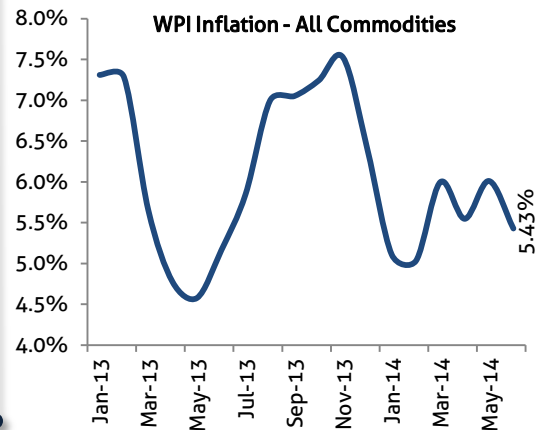
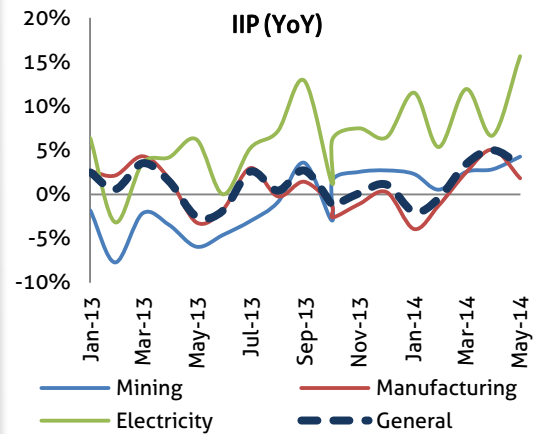
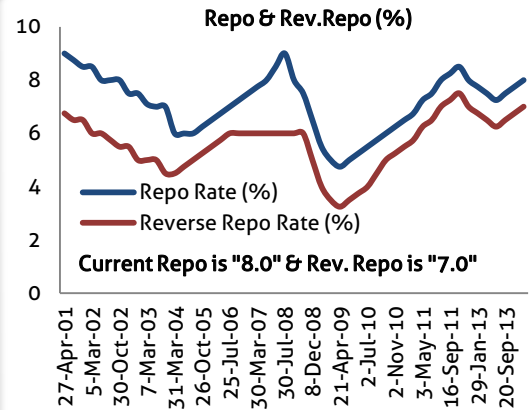
- ❖ TVS Motor Company reported a 46% increase in its total sales at 2,27,482 units in August 2014.
- ❖ Crop protection chemical company Sharda Cropchem plans to enter the capital market with its Initial Public Offering (IPO) of 22,555,124 equity shares of face value of Rs 10 each.(BS)
- ❖ Healthcare major Apollo Hospitals Enterprise plans to add 3 more reach hospitals with a total bed capacity of 500 beds in the country at an investment of Rs 400 crore in the current financial year. (BS)
- ❖ Auto majors Maruti Suzuki, Honda Cars, Hyundai and Nissan reported healthy growth in domestic sales riding on an improved sentiment in the market. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3120	(0.0008)	(0.06)
GBP-USD	1.6587	(0.0021)	(0.13)
USD-JPY	104.75	0.40	0.38



## Domestic News (Cont...)

- ❖ The country's largest two-wheeler maker Hero MotoCorp reported 21.43% jump in its total sales at 5,58,609 units in August 2014. (BS)
- ❖ Tata Motors reported 17.59% decline in total sales at 40,883 units in August, 2014 as against 49,611 units in the same month last year. (BS)
- ❖ Cipla Ltd has launched an anti-asthma inhaler in Germany and Sweden that is a generic version of GlaxoSmithKline Plc's Advair, a move that will further dent sales of the British firm's top-selling product. (BS)
- ❖ Two-wheeler maker Royal Enfield reported 66 per cent increase in total sales in August at 26,643 units. (BS)
- ❖ TVS Motor Company has reported a 47% growth in two-wheelers in the month of August 2014 to 217,662 units from 148,469 units recorded in August 2013. (BS)
- ❖ Unperturbed by intense lobbying by industry, capital markets regulator Sebi has said that listed companies must follow higher corporate governance standards and there will be no dilution to the new norms kicking in from next month. (BS)
- ❖ The amount of money raised through the private placement of debt instruments in the June quarter was less than half the amount raised in the same period last year. (BS)
- ❖ Hinduja Group flagship company Ashok Leyland reported 16.69% increase in its total sales at 8,331 units in August. (BS)
- ❖ The country's largest car-maker Maruti Suzuki India reported 26.9% increase in its total sales in August at 1,10,776 units as against 87,323 units in the same month of previous year. (BS)
- ❖ Power producer Neyveli Lignite Corporation has lined up renewable energy projects worth over Rs 500 crore. (BS)
- ❖ A Reserve Bank of India (RBI) ban on Indian banks buying new issues of infrastructure bonds has handicapped Prime Minister Narendra Modi's chances of gathering billions of dollars needed for mega-projects through the bond market. (BS)
- ❖ Wockhardt said its new drug discovery programme in anti-infective research has received a major boost after two of its drugs, WCK 771 and WCK 2349, received the Qualified Infectious Disease Product (QIDP) status from the US FDA. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Sep-14	Ramkrishna Forgings Ltd	WAYZATA II INDIAN OCEAN LIMITED	SELL	618500	234.9
1-Sep-14	Sagar Cements Ltd	KOTAK MAHINDRA (INTERNATIONAL) LIMITED	BUY	351000	386.4
1-Sep-14	Vivimed Labs Limited	RAJYOG SHARE AND STOK BROKERS LTD	BUY	87966	318.0
1-Sep-14	Ind Terrain Fashions Ltd	CHARAK AYURMEDICA PVT LTD	BUY	31033	346.1
1-Sep-14	Veto Switchgear Cable Ltd	MAHALAXMI BROKRAGE INDIA PRIVATE LIMITED	SELL	165000	54.0

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
1-Sep-14	ASTRAMICRO	AXIS MUTUAL FUND A/C AXIS LONG TERM EQ FUND	S	1,540,000	129.8
1-Sep-14	CAMSONBIO-\$	VINOD MOHAN NAIR	S	185,243	130.4
1-Sep-14	SCANPGEOM	KARNAVATI INFRASTRUCTURE PROJECTS LTD	S	750,000	18.0
1-Sep-14	GANECOS	SHAKTI HOTELS PRIVATE LIMITED	S	100,000	123.0
1-Sep-14	SHHARICH	KETAN JAYANTILAL KARANI	S	64,849	147.2

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
511676	GICHSGFIN	02-Sep-14	Dividend - Rs.5.00	-
511676	GICHSGFIN	02-Sep-14	Special Dividend - Rs.1.00	-
532514	IGL	02-Sep-14	Dividend - Rs.5.50	-
533192	KCPSUGIND	02-Sep-14	Dividend - Rs.0.85	-
532698	NITINSPIN	02-Sep-14	Dividend - Rs.0.75	-
513121	ORICON-\$	02-Sep-14	Dividend - Rs.0.19	-
532955	RECLTD	02-Sep-14	Final Dividend - Rs.1.75	-
535322	REPCOHOME	02-Sep-14	Dividend - Rs.1.20	-
532923	RJL	02-Sep-14	Final Dividend - Rs.1.00	-
533552	RUPA	02-Sep-14	Dividend - Rs.2.50	-
522108	YUKEN-\$	02-Sep-14	Dividend - Rs.1.50	-
530043	ACKNIT	03-Sep-14	Dividend - Rs.1.50	-
513252	JAYUSH	03-Sep-14	Dividend - Rs.2.50	-
524731	JENBURPH	03-Sep-14	Dividend - Rs.5.10	-
534190	OLPCL	03-Sep-14	Final Dividend - Rs.0.70	-
523642	PIIND	03-Sep-14	Final Dividend - Rs.1.00	-
505502	PSITINFRA	03-Sep-14	Stock Split from Rs.10/- to Re.1/-	04-Sep-14
507649	RASOI	03-Sep-14	Dividend - Rs.1.00	-
532904	SUPREMEINF	03-Sep-14	Dividend - Rs.1.50	-
505160	TALBROAUTO	03-Sep-14	Dividend - Rs.1.20	-
531373	THEBYKE	03-Sep-14	Final Dividend - Rs.1.50	-
531426	TNPL	03-Sep-14	Dividend - Rs.6.00	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Sep-14	JPY	Manufacturing PMI		52.4	52.4
01-Sep-14	CNY	HSBC Manufacturing PMI		50.3	50.3
01-Sep-14	EUR	Manufacturing PMI		50.8	50.8
01-Sep-14	GBP	BoE Consumer Credit		0.550B	0.418B
01-Sep-14	GBP	Business Investment (QoQ)		2.00%	5.00%
01-Sep-14	GBP	Manufacturing PMI		55	55.4
01-Sep-14	GBP	Mortgage Approvals		67K	67K
02-Sep-14	EUR	PPI (MoM)		-0.10%	0.10%
02-Sep-14	USD	Manufacturing PMI			58
02-Sep-14	USD	Construction Spending (MoM)		1.00%	-1.80%
02-Sep-14	USD	ISM Manufacturing PMI		56.9	57.1
03-Sep-14	USD	MBA 30-Year Mortgage Rate			4.28%
03-Sep-14	USD	ISM - NY Business Conditions			644.4
03-Sep-14	USD	Factory Orders (MoM)		11.00%	1.10%
03-Sep-14	USD	Beige Book			
04-Sep-14	JPY	Interest Rate Decision		0.10%	0.10%
04-Sep-14	GBP	BoE QE Total			375B
04-Sep-14	GBP	Interest Rate Decision		0.50%	0.50%
04-Sep-14	EUR	Interest Rate Decision		0.15%	0.15%
04-Sep-14	USD	ADP Nonfarm Employment Change		220K	218K
04-Sep-14	USD	Initial Jobless Claims		300K	298K
04-Sep-14	USD	Trade Balance		-42.20B	-41.50B
04-Sep-14	USD	ISM Non-Manufacturing PMI		57.6	58.7
05-Sep-14	EUR	GDP (YoY)		0.70%	0.70%
05-Sep-14	USD	Nonfarm Payrolls		220K	209K
05-Sep-14	USD	Unemployment Rate		6.10%	6.20%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
01-Sep-14	INR	HSBC Markit Manufacturing PMI		52.9	53
01-Sep-14	INR	Infrastructure Output (YoY)			7.30%
03-Sep-14	INR	HSBC Services PMI			52.2
03-Sep-14	INR	M3 Money Supply			13.30%
05-Sep-14	INR	Bank Loan Growth			11.60%
05-Sep-14	INR	FX Reserves, USD			318.58B

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