

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8957	0.62	CNX IT	12664	0.03
Sensex	29459	0.33	BANK NIFTY	20008	1.61
DowJones	18289	0.86	S&P CNX 500	7300	0.83
Nasdaq	5008	0.90	CNX FMCG	20649	(2.15)
Hangseng	24881	(0.02)	CNX REALTY	3856	(0.03)
Shanghai	3296	(1.20)	CNX AUTO	8920	(0.18)
Nikkei	18787	(0.21)	CNX ENERGY	8712	0.18
Strait Times	3427	0.69	CNX PHARMA	12024	1.91
Kospi	1999	0.11	Advances / Declines	BSE	NSE
Taiwan	9584	(0.18)	Advances	1519	691
FTSE	6941	(0.09)	Declines	1337	506
CAC	4917	(0.69)	Unchanged	122	35
DAX	11410	0.08	Total	2978	1232

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ULTRACEMCO	3377.05	7.70
AMBUJACEM	287.00	6.73
AXISBANK	650.00	6.11
GRASIM	3978.10	5.99
CIPLA	722.45	5.92

Nifty Losers		
Company	Price(Rs)	Chg(%)
ITC	343.15	(5.04)
JINDALSTEL	187.70	(4.11)
BAJAJ-AUTO	2078.00	(3.50)
HEROMOTOCO	2628.00	(2.11)
BHARTIARTL	348.75	(2.11)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
TTKPRESTIG	2.19	0.0	149
ELGIEQUIP	5.34	0.1	111
KARURVYSYA	3.91	0.1	59
PRESTIGE	16.38	0.3	50
TUBEINVEST	1.55	0.1	17

Indian Forex	Closing	Chg	% Chg
USD/INR	61.825	0.034	0.06
GBP/INR	95.266	(0.158)	(0.17)
EUR/INR	69.139	(0.147)	(0.21)
JPY/INR	51.620	(0.230)	(0.44)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26800	220
Silver (Rs/1kg)	37038	402

Commodities	Price	% Chg.
Crude (US\$/BBL)	49.8	0.89
Brent (US\$/BBL)	60.1	(3.45)
Gold (US/oz)	1197.9	(1.92)
Silver (US\$/oz)	16.2	(3.64)
Copper (US\$/MT)	5896.0	0.26
Alum (US\$/MT)	1797.0	0.14
Zinc(US\$/MT)	2048.5	(0.58)

ADR	Cl. Values	% Chg.
ICICI Bank	11.77	0.12
HDFC Bank	62.73	0.72
Infosys	36.60	(0.11)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	54.25	1.57
Wipro	13.83	0.05
Tata Motors	48.91	(0.31)

Market Sensor

US market closed higher on Monday, with the Nasdaq above the psychologically key level of 5,000 for the first time since March 2000 and the Dow and S&P 500 at records as investors cheered U.S. economic data and an interest rate cut in China. Dow Jones Industrial Average was up 0.86% or 155.93 points at 18288.63. Nasdaq Composite was up 0.90% or 44.57 points at 5008.10. Standard & Poor's 500 was up 0.61% or 12.89 points at 2117.39.

Indian equity market made a gap-up opening and managed to end with modest gains amid volatility, HSBC Purchasing Manager's Index fell to five month low in February. Nifty ended the previous trading session with a gain of 0.62% or 54.90 points at 8956.75. On Monday's trading session, FII's bought Rs.424.79 Cr in cash market and bought net Rs.3056.39 in derivative segment. Whereas, DII bought net Rs.180.35 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8780 followed by 8670 while resistance exist at 8980 and then at 9050.

Global News

❖ UK house prices fell in February for the first time in five months, according to research by Nationwide. Average house prices fell 0.1% from £188,446 in January to £187,964, said the UK's second biggest mortgage lender. (BBC)

❖ Manufacturing output in Ireland has risen to its highest level in more than 15 years, according to the Markit Purchasing Managers' Index (PMI). Accelerated growth in both new orders and production pushed Ireland's PMI to 57.5 in February. A figure above 50 suggests expansion. (BBC)

❖ The slowdown in the US economy at the end of last year was more pronounced than previously thought, official figures have shown. The world's largest economy grew at an annual pace of 2.2% between October and December, against a previous estimate of 2.6%, the Commerce Department said. (BBC)

❖ Euro zone countries are discussing a third bailout for Greece worth 30 billion to 50 billion euros, Spain's economy minister said on Monday, but EU officials said there were no such talks. (Reuters)

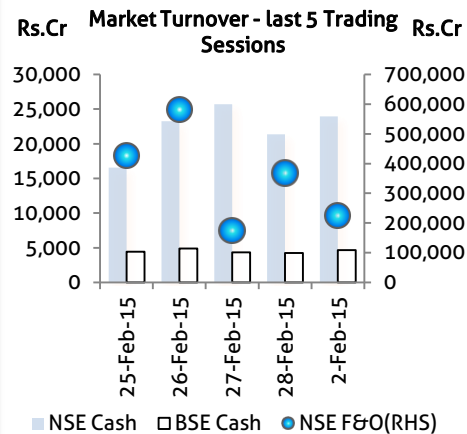
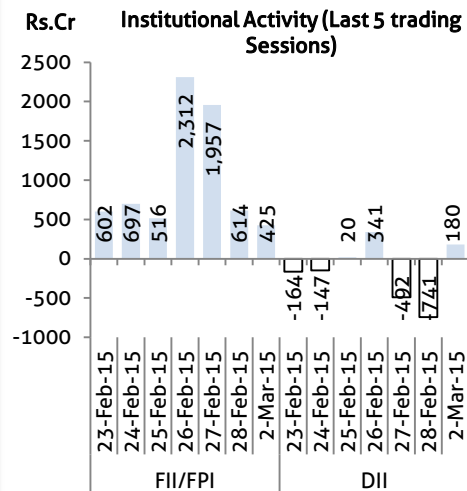
❖ Global stimulus is swelling, with China cutting interest rates ahead of disappointing factory data and the European Central Bank set to start government bond purchases just as data hints the euro zone economy may be picking up. (Reuters)

Economic News

- ❖ Fiscal deficit rose to Rs 5.68 lakh crore in April-January period, breaching the budget estimate by 107% which may call for harder measures by the government to meet the target of 4.1% of the GDP for full 2014-15 financial year. (BS)
- ❖ The annual infrastructure output growth slowed to more than a year's low of 1.8% in January, mainly dragged down by a sharp slowdown in crude oil and natural gas production, government data showed on Monday. (BS)
- ❖ The Reserve Bank may cut key interest rates as early as this week, as the fiscal measures announced in the Union Budget are unlikely to disturb the "disinflation" trend, say analysts. (BS)
- ❖ The FDI in the mining sector jumped to a whopping \$657.46 million in the April-December period of this fiscal as compared with just \$12.73 million in the entire 2013-14 fiscal, Parliament was informed. (BS)
- ❖ Power Minister Piyush Goyal said the target of adding 1,18,537 MW capacity for the current Plan period will not only be achieved but can even exceed. (BS)
- ❖ The coal ministry is re-examining winning bids for three of the 18 mines put up for auction last month, a government source said on Monday, after media reports of problems with the bidding process. (BS)
- ❖ The Commerce and Industry Ministry sought imposition of import duty on cement in order to boost exports from the country and provide a level playing field to domestic manufacturers of the commodity. (BS)
- ❖ The Finance Ministry and the Reserve Bank have agreed to inflation rate targeting under which the apex bank will aim to lower retail inflation to 6% by January 2016 and further to around 4% by March next year. (BS)
- ❖ India slashed its Iranian oil imports in February to a 1-1/2-year low to keep annual volumes from Tehran near the previous fiscal year's levels and within the limits allowed under a deal aimed at curtailing the OPEC nation's nuclear programme. (BS)
- ❖ After the Budget deferred fiscal consolidation by a year, it was interesting to gauge the response of rating agencies. Atsi Sheth, senior vice president Moody's Investors Service, tells that the Budget has not changed the rating agencies views on India's sovereign rating. Moody's has assigned India the lowest investment grade. She says Moody's has already taken into account India's higher growth and lower fiscal deficit compared to similarly rated peers. (BS)
- ❖ Growth in India's manufacturing activities fell to a five-month low in February, mainly because of subdued output and new orders, showed the widely tracked HSBC Purchasing Managers' Index (PMI). Some manufacturing companies expected to be drivers in job creation reduced their workforce during the month, albeit marginally. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1195	0.0011	0.10
GBP-USD	1.5374	0.0008	0.05
USD-JPY	119.77	(0.36)	(0.30)

Bond Markets	Closing	Chg
10-yr bond	7.75	2.10 bps
Interbank call	7.61	6.37 bps

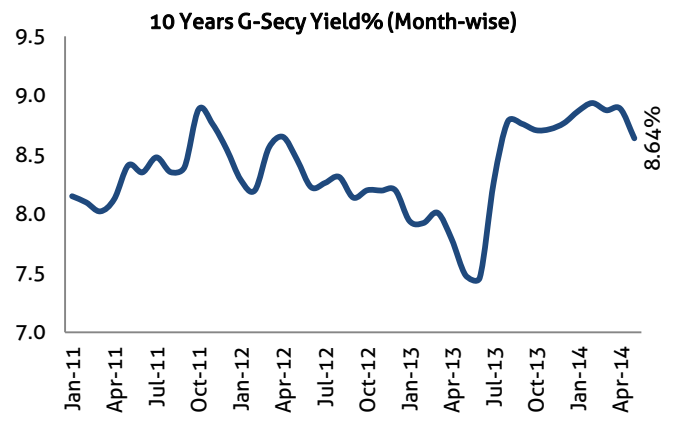
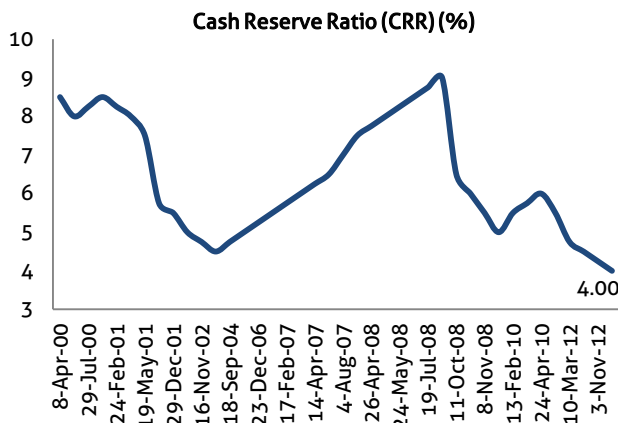
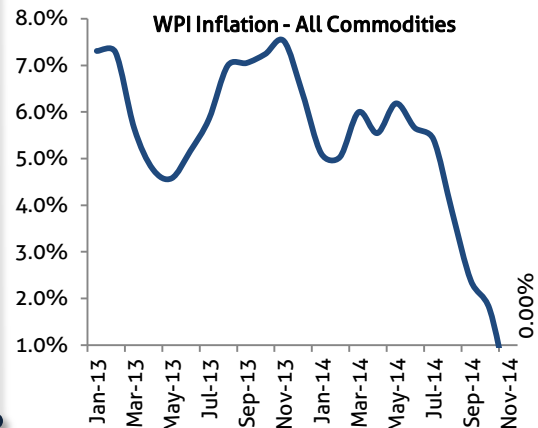
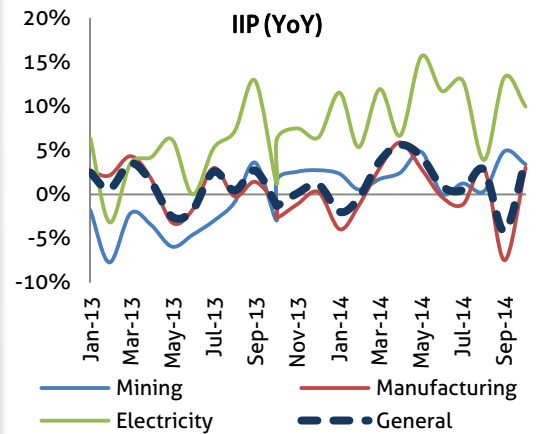
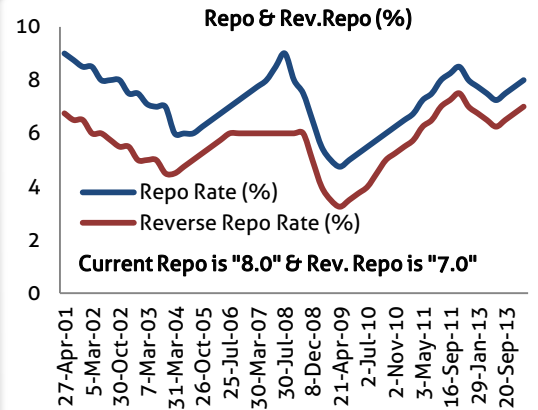


Domestic News

- ❖ Indian companies paying royalty and technical fees to a non-resident can look forward to a lower tax as the Union budget has reduced the rate from 25 per cent to 10 per cent. (BS)
- ❖ Consumer product companies have reason to cheer after the announcement of the Budget. At a time when the noise levels over reining in welfare expenditure were getting louder, the Budget has increased allocation for the MGNREGA to Rs 34,699 crore from the current Rs 34,000 crore (BS)

Domestic News (Cont...)

- ❖ Automaker Mahindra & Mahindra reported 10% decline in total sales at 38,033 units in February. (BS)
- ❖ Country's largest two-wheeler maker Hero MotoCorp reported 3.8 per cent decline in sales at 4,84,769 units in February. (BS)
- ❖ TVS Motor Company reported a sales growth of 15% in February 2015, with total sales increasing to 204,565 units from 177,662 units recorded in the month of February 2014. (BS)
- ❖ Hinduja Group flagship company Ashok Leyland reported a 36% jump in total sales at 10,762 units for February, 2015, as against 7,915 units in the same month last year. (BS)
- ❖ Hyderabad-based drug maker, Natco Pharma Limited, has signed a non-exclusive licencing agreement with US-headquartered, research-based biopharmaceutical company Gilead Sciences to manufacture and sell generic versions of its chronic hepatitis-C medicines. (BS)
- ❖ Dr Datsons Labs said it has inked marketing and supply agreement with Yemen's Al-Mugdh Pharma to sell its anti-malarial drugs in that country. (BS)
- ❖ Slowing sales of Mahindra & Mahindra for its key product categories of utility vehicles and tractors is expected to continue over the near term due to a slowing rural economy and lack of new products. (BS)
- ❖ Videocon Industries reported 5.55% increase in standalone net profit at Rs 18.61 crore for the quarter ended December 2014. (BS)
- ❖ Bajaj Auto reported a 21% decline in motorcycle sales at 2,16,077 units in February 2015. The company had sold 2,73,323 units in the year ago period. (BS)
- ❖ The country's largest carmaker Maruti Suzuki India (MSI) reported 8.7 per cent increase in total sales in February at 1,18,551 units as against 1,09,104 units in the same period of last year. (BS)
- ❖ Tata Motors reported 10.69 per cent increase in total sales at 44,225 units in February, as against 39,951 units in the same month last year. (BS)
- ❖ Escorts Ltd reported 25.56% dip in tractor sales at 3,444 units in February. The company had sold 4,627 tractors in February 2014, Escorts Ltd said in a statement. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
2-Mar-15	Ipca Laboratories Ltd.	FRANKLIN TEMPLETON INVESTMENT FUNDS	BUY	1000000	662.0
2-Mar-15	Unitech Ltd	ADROIT SHARE & STOCK BROKER PVT. LTD.	BUY	17538534	20.2
2-Mar-15	NCC Limited	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	SELL	3642693	80.9
2-Mar-15	Sanghvi Movers Ltd.	GOLDPEAK LIMITED	SELL	1036350	250.4
2-Mar-15	Lakshmi Vilas Bank Ltd	EVERSIGHT TRADECOMM PRIVATE LIMITED	SELL	1162506	97.3

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
2-Mar-15	TTKPRESTIG	NALANDA INDIA EQUITY FUND LIMITED	B	159,661	3025.0
2-Mar-15	NCC	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	S	5,838,092	81.0
2-Mar-15	ORICON-\$	CLEARWATER CAPITAL PARTNERS SINGAPORE FUND III PRIVATE LIMITED FD	S	1,000,000	54.3
2-Mar-15	BALAJITELE	JEWELS ADVISORY SERVICES LLP	S	400,000	65.3
2-Mar-15	FERVENTSYN	VIJAY PRAVINCHANDRA THAKKAR	S	240,000	86.4

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
535127	BSLAIIDND	03-Mar-15	Temporary Suspension	04-Mar-15
535129	BSLAIIDQD	03-Mar-15	Temporary Suspension	04-Mar-15
535124	BSLAPIIIDG	03-Mar-15	Temporary Suspension	04-Mar-15
535130	BSLAPIIIRG	03-Mar-15	Temporary Suspension	04-Mar-15
535131	BSLAPIIIRND	03-Mar-15	Temporary Suspension	04-Mar-15
535132	BSLAPIIIRQ	03-Mar-15	Temporary Suspension	04-Mar-15
533278	COALINDIA	03-Mar-15	Interim Dividend - Rs.20.70	04-Mar-15
532191	SBT	03-Mar-15	Right1:5	04-Mar-15
532810	PFC	04-Mar-15	Interim Dividend - Rs.8.50	05-Mar-15
505590	SVPGLOB	04-Mar-15	BONUS 9:1	05-Mar-15
537717	TFM46PA	04-Mar-15	Dividend On Mutual Fund	05-Mar-15
537717	TFM46PA	04-Mar-15	Redemption of Mutual Fund	05-Mar-15
537715	TFM46PB	04-Mar-15	Redemption of Mutual Fund	05-Mar-15
537714	TFM46PC	04-Mar-15	Redemption of Mutual Fund	05-Mar-15
537714	TFM46PC	04-Mar-15	Dividend On Mutual Fund	05-Mar-15
537716	TFM46PD	04-Mar-15	Redemption of Mutual Fund	05-Mar-15
532898	POWERGRID	09-Mar-15	Interim Dividend - Rs.-	10-Mar-15
500003	AEGISLOG	10-Mar-15	Interim Dividend - Rs.-	11-Mar-15
500092	CRISIL	10-Mar-15	Final Dividend - Rs.6.00	-
500092	CRISIL	10-Mar-15	Special Dividend - Rs.4.00	-
533179	PERSISTENT	10-Mar-15	BONUS 1:1	11-Mar-15
531731	AARYAGLOBL	11-Mar-15	BONUS 3:4	12-Mar-15

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
Time	Cur.	Event	Actual	Forecast	Previous
02-Mar-15	JPY	Manufacturing PMI (Feb)		51.5	51.5
02-Mar-15	CNY	HSBC Manufacturing PMI (Feb)		50.1	50.1
02-Mar-15	GBP	Nationwide HPI (YoY) (Feb)		6.10%	6.80%
02-Mar-15	EUR	Manufacturing PMI (Feb)		51.1	51.1
02-Mar-15	GBP	BoE Consumer Credit (Jan)		0.900B	0.516B
02-Mar-15	GBP	Manufacturing PMI (Feb)		53.4	53.1
02-Mar-15	EUR	CPI (YoY) (Feb)		-0.40%	-0.60%
02-Mar-15	EUR	Unemployment Rate (Jan)		11.40%	11.30%
02-Mar-15	USD	Personal Income (MoM) (Jan)		0.40%	0.30%
02-Mar-15	USD	Manufacturing PMI (Feb)		54.3	54.3
02-Mar-15	USD	Construction Spending (MoM) (Jan)		0.30%	0.40%
02-Mar-15	USD	ISM Manufacturing PMI (Feb)		53.1	53.5
03-Mar-15	EUR	PPI (YoY) (Jan)		-3.00%	-2.70%
04-Mar-15	USD	MBA 30-Year Mortgage Rate			3.99%
04-Mar-15	USD	ADP Nonfarm Employment Change (Feb)		220K	213K
04-Mar-15	USD	ISM Non-Manufacturing PMI (Feb)		56.5	56.7
05-Mar-15	GBP	BoE QE Total (Mar)		375B	375B
05-Mar-15	GBP	Interest Rate Decision (Mar)		0.50%	0.50%
05-Mar-15	EUR	Interest Rate Decision (Mar)		0.05%	0.05%
05-Mar-15	USD	Initial Jobless Claims		319K	313K
06-Mar-15	EUR	GDP (YoY) (Q4)		0.90%	0.90%
06-Mar-15	USD	Manufacturing Payrolls (Feb)		14.0K	22.0K
06-Mar-15	USD	Nonfarm Payrolls (Feb)		240K	257K
06-Mar-15	USD	Trade Balance (Jan)		-41.40B	-46.60B
06-Mar-15	USD	Unemployment Rate (Feb)		5.60%	5.70%

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
02-Mar-15	INR	HSBC Markit Manufacturing PMI (Feb)			52.9
02-Mar-15	INR	Infrastructure Output (YoY) (Jan)			2.40%
03-Mar-15	INR	Federal Fiscal Deficit (Jan)			5,323.81B
04-Mar-15	INR	HSBC Services PMI (Feb)			52.4
04-Mar-15	INR	M3 Money Supply (2wk)			11.40%
06-Mar-15	INR	Bank Loan Growth (2wk)			10.40%
06-Mar-15	INR	Deposit Growth (2wk)			11.80%
06-Mar-15	INR	FX Reserves, USD			334.19B

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