

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5986	-2.26	CNX IT	6472	1.28
Sensex	19760	-2.25	BANK NIFTY	12476	-2.58
DowJones	15116	-1.36	S&P CNX 500	4681	-1.94
Nasdaq	3456	-1.01	CNX FMCG	17509	-2.10
Hangseng	22515	0.55	CNX REALTY	214	-3.61
Shanghai	2301	0.12	CNX AUTO	4769	-1.78
Nikkei	13489	-2.07	CNX ENERGY	7852	-2.57
Strait Times	3291	-0.60	CNX PHARMA	6729	-1.26
Kospi	1999	-0.11	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8202	-0.65	Advances	791	317
FTSE	6583	-1.11	Declines	1591	990
CAC	3949	-1.19	Unchanged	118	59
DAX	8349	-0.61	Total	2500	1366

Nifty Gainers		
Company	Price(Rs)	Chg(%)
INFY	2404.00	2.67
SESAGOA	161.50	2.44
AMBUJACEM	183.65	0.85
HCLTECH	746.80	0.65
TCS	1501.00	0.11

Nifty Losers		
Company	Price(Rs)	Chg(%)
ULTRACEMCO	1885.00	-5.18
RELINFRA	363.30	-4.92
PNB	761.00	-4.64
GAIL	305.80	-4.57
IDFC	146.05	-4.57

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Torrent Pharma	1.06	0.12	8.89
MOIL	9.26	1.06	8.70
Opto Circuits	99.08	14.10	7.03
Videocon Inds	4.99	0.71	7.02
NIIT Tech	1.92	0.32	5.97

Indian Forex	Closing	Chg	% Chg
USD/INR	56.4958	-0.3963	-0.71%
GBP/INR	86.0092	-0.8782	-1.03%
EUR/INR	73.6807	-0.8831	-1.21%
JPY/INR	56.03	-0.35	-0.63%

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27200	450
Silver (Rs/1kg)	44498.5	498.5

Commodities	Price	% Chg.
Crude (US\$/BBL)	91.7	0.38
Brent (US\$/BBL)	99.9	-0.46
Gold (US/oz)	1394.2	1.73
Silver (US\$/oz)	22.3	1.56
Copper (US\$/MT)	7241.0	0.61
Alum (US\$/MT)	1875.5	1.98
Zinc(US\$/MT)	1882.0	1.80

ADR	Cl. Values	% Chg.
ICICI Bank	44.97	-4.05
HDFC Bank	40.24	-3.94
Infosys	41.75	0.07
Sterlite Inds.	6.62	1.07
Dr Reddy's Labs	36.97	-1.04
Wipro	7.63	-2.55
Tata Motors	27.43	-4.33

## Market Sensor

U.S markets ended the month of May with big losses, with the Dow and S&P 500 posting their worst one-day drops since mid-April, but major averages still logged monthly gains. Dow Jones Industrial Average was down 1.36% or 208.96 points at 15115.57. Nasdaq Composite was down 1.01% or 35.28 points at 3455.91. Standard & Poor's 500 was down 1.43% or 23.67 points at 1630.74.

Indian Markets tumbled on Friday noting a loss of 138 points in Nifty. An all round selling pressure was witnessed in the market. Nifty ended the previous trading session with a decline of 2.26% or 138.10 points at 5985.95. On Friday's trading session, FII's sold net Rs.504.02 Cr in cash market and sold net Rs 1194.79 Cr. in derivative segment. Whereas, DII bought net Rs 203.11 Cr in cash segment.

**Coming to today's trade, market is likely to remain choppy with negative bias. With earning season also being on the verge of finishing, fresh trigger in the market seems to be lacking and uncertain global economic backdrop might play the pivotal role.**

## Global News

❖ Asian stocks fell, with the regional benchmark index heading for a third-day of losses, after improving U.S. economic data added to concern the Federal Reserve will scale back its stimulus and a survey showed China's manufacturing contracted. (Bloomberg)

❖ Gold climbed, extending the first back-to-back weekly gain in four weeks, as outflows in investor holdings slowed and the dollar retreated. Silver, platinum and palladium advanced. (Bloomberg)

❖ Brent crude dropped below \$100 a barrel for the first time in a month and WTI declined amid speculation that stockpiles will climb after OPEC kept its production target unchanged. (Bloomberg)

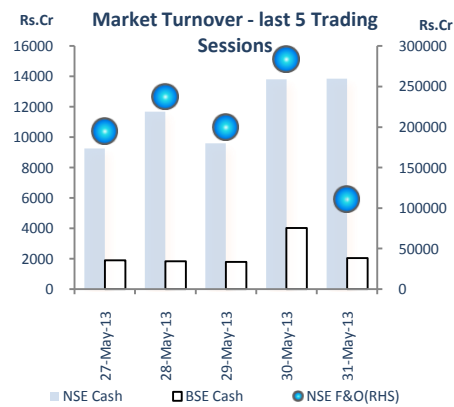
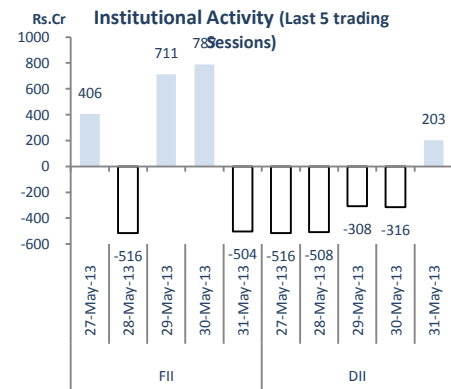
❖ China's new home prices jumped in May by the most since they reversed declines in December, as the government's efforts to tighten property curbs this year fail to deter buyers. (Bloomberg)

## Economic News

- ❖ The country's economic growth is expected to be in the 6-6.5% range in 2013-14, while wholesale price index inflation may be above 7%, according to CII survey. (BS)
- ❖ The Collegium system of appointing judges has not worked to the expectations and the government must have a say in such appointments, Law Minister Kapil Sibal has said as he prepares to move a Cabinet note to scrap the two-decades-old system. (BS)
- ❖ In the run-up to assembly elections later this year, Indian states are resorting to massive electricity purchases from the spot market. The last minute power shopping may or may not help the governments woo voters but it would certainly impact the financial health of distribution companies. (BS)
- ❖ The Telecom Ministry is believed to have cleared the name of retired Supreme Court judge Aftab Alam for appointment as chairman of tribunal TDSAT. (BS)
- ❖ Government's efforts to promote India as an investment destination does not seem to be yielding fruits as FDI inflows registered 38 % decline to \$ 22.42 billion in 2012-13 compared to the previous year.(BS)
- ❖ Keeping in view the volatile price trend in global bullion market, the government has raised the import tariff value of gold to \$459 per 10 grams, while it has been slashed at \$ 737 per kg for silver imports. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3005	0.0006	0.05%
GBP-USD	1.5215	0.0017	0.11%
USD-JPY	100.660	0.2100	0.21%

Bond Markets	Closing	Chg
10-yr bond	7.41	9.8 bps
Interbank call	7.18	1.0 bps

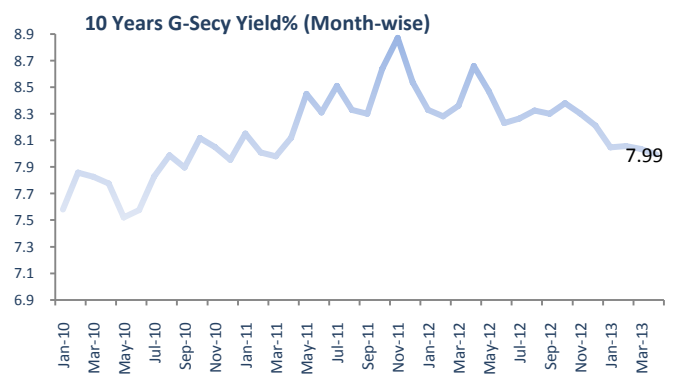
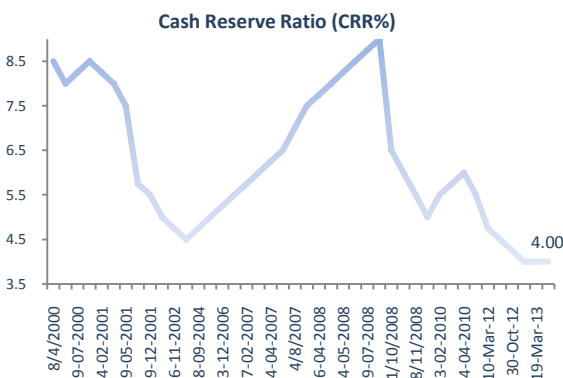
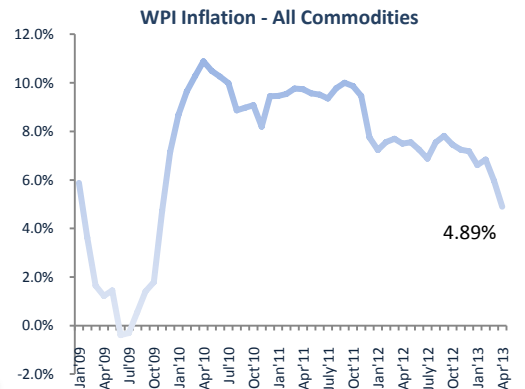
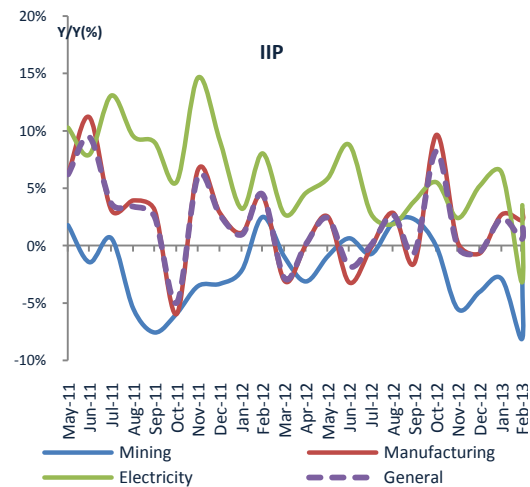
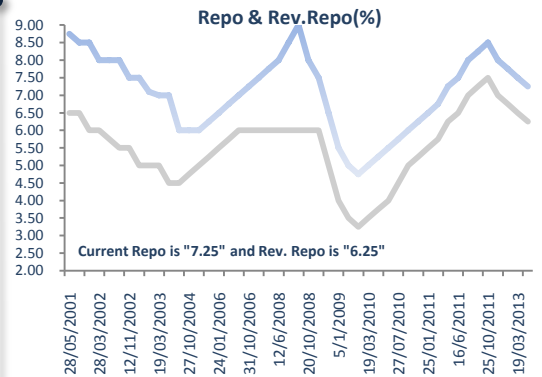


## Domestic News

- ❖ Encouraged by the success of India pilot project of employing people suffering from autism, German IT major SAP is looking to replicate the practice globally to leverage their unique talents.(BS)
- ❖ The South African subsidiary of beleaguered drug maker Ranbaxy, has assured the public that drugs manufactured locally are safe, days after the Indian firm paid a fine of \$500 million in the US after pleading guilty to charges of making and selling adulterated drugs. (BS)
- ❖ South Africa-based Sanlam, a leading financial services group which was originally established as a life insurance company in 1918, at end of last year invested around Rs 2,500 crore in Shriram Group's financial service businesses, which estimated to be around Rs 60,000 crore. (BS)
- ❖ Home-grown express courier company DTDC, which has done a string of global acquisitions and tie-ups, aims to increase the share of revenues from the high margin international operations to 18% in the next two years, a top official of the company said. (BS)
- ❖ By October, TV viewers who are annoyed by frequent and long advertisement breaks can expect some relief. Broadcasting regulator Trai has now made it clear that there will be a cap of 12 minutes per hour for showing advertisements and promotional clips. (BS)
- ❖ Three more senior executives of Kingfisher Airlines, including its chief information officer, have quit the grounded carrier even as a section of its pilots are set to revive their agitation over non-payment of salaries. (BS)
- ❖ Fresh from a change in ownership, Pantaloons Fashion & Retail Ltd will be investing up to Rs 175 crore in the next 12 months on store expansion across India, mainly in smaller towns. (BS)

## Domestic News(Conti..)

- ❖ PE fund Apax Partners, which has sunk in over \$350 million in iGATE, says it is confident that the IT services firm will undergo "seamless" transition following the exit of Phaneesh Murthy and achieve its long-term goals. (BS)
- ❖ Hitting out against the arrest of its three top executives in India, US-based Amway today said "more civil and constructive ways to handle consumer disputes" are required in India. (BS)
- ❖ Having established itself as a major player in Mauritius, top Indian bank SBI expects robust business in providing funds to Indian companies looking to use this island nation as a gateway for investments in Africa. (BS)
- ❖ The National Aluminium Co Ltd (NALCO) has raised aluminium prices by Rs 4,500 per tonne in the domestic market, company sources said. (BS)
- ❖ The government is likely to take a view on the Rs 11,217-crore Vodafone tax case next week, a top Finance Ministry official has said. "The issue (Vodafone tax dispute) may come before the Cabinet next week," the official said. (BS)
- ❖ Realty major DLF Ltd will invest about Rs 3,000 crore this fiscal on construction of various projects and is targeting sales booking of more than Rs 6,000 crore. (BS)
- ❖ Hinduja Group flagship Ashok Leyland Ltd has posted a decrease of 16 per cent in total sales at 7,267 units for the month of May, 2013, as compared to 8,655 units in the same month of last year. (BS)
- ❖ Two-wheeler manufacturer Honda Motorcycle & Scooter India (HMSI) today reported 3% growth in its total sales for May 2013 at 2,29,006 units. (BS)
- ❖ State-owned Hindustan Petroleum Corp Ltd (HPCL) today said K V Rao has taken over as the company's new Director (Finance). (BS)
- ❖ France-based auto major Renault today reported 13-fold increase in sales in India in May at 6,013 units. (BS)
- ❖ Sameer Shah, 45, has taken over from today as managing director (In charge) of country's number two commodity futures exchange, the National Commodities & Derivatives Exchange (NCDEX). (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
31-May-13	Apollo Hospitals Ltd	HSTN ACQUISITION (FII) LTD	SELL	1286679	995.34
31-May-13	Jet Airways (India) Ltd.	TAIL WINDS LIMITED	SELL	1123157	512
31-May-13	MOIL Limited	MIM AC MFS INTERNATIONAL NEW DISCOVERY FUND	BUY	943285	200.05
31-May-13	Housing Development and I	ALIVE CONSULTANTS ALIVE	SELL	2612116	42.3
31-May-13	Opto Circuits (India) Lim	CROSSEAS CAPITAL SERVICES PVT. LTD.	SELL	1714013	38.31

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
31-May-13	MOIL	MFS INTERNATIONAL NEW DISCOVERY FUND	B	863140	200.05
31-May-13	Opto Circuits	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	1336257	38.38
31-May-13	Deep Inds	PARAMOUNT CLUB LLP	B	291459	40.36
31-May-13	Fedders Lloyd	CLSA (MAURITIUS) LIMITED	S	303403	30
31-May-13	ECE Inds-\$	BLUE BIRD MERCANTILES PRIVATE LIMITED	S	69606	122

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Rs.
504959	Stovec Inds	3-Jun-13	Final Dividend	10.7
532457	Gulshan Poly	4-Jun-13	Dividend	2.5
531531	Hatsun Agro	4-Jun-13	3rd Interim Dividend	0.4
532827	Page Inds	5-Jun-13	1st Interim Dividend	14
532480	Allahabad Bank	6-Jun-13	Dividend	6
500820	Asian Paints	6-Jun-13	Final Dividend	36.5
526560	EICL-\$	6-Jun-13	Dividend	0.2
511357	Kailash Auto	6-Jun-13	Reduction of Capital	-
508982	Linkson Intl	6-Jun-13	Stock Split from Rs.10/- to Rs.5/-	-
531597	Midland Poly	6-Jun-13	BONUS 1:1	-
500315	Oriental Bank	6-Jun-13	Dividend	-
533295	Punjab & Sind Bank	6-Jun-13	Dividend	-
532540	TCS	6-Jun-13	Final Dividend	13
533171	United Bank	6-Jun-13	Final Dividend	2.1
500165	Kansai Nerolac	7-Jun-13	Dividend	11
526109	Pricol	7-Jun-13	Dividend	-
500355	Rallis India	7-Jun-13	Final Dividend	1.3
501148	Dalal Street Inv	10-Jun-13	Right 2:1	-
532240	India Nippon	10-Jun-13	2nd Interim Dividend	5
505750	Josts Engr	10-Jun-13	Dividend	15
504966	Tinplate Co	10-Jun-13	Dividend	1

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
03-Jun-13	JPY	Capital Spending (QoQ)	-3.90%	-5.50%	-8.70%
03-Jun-13	AUD	Business inventories (MoM)	-0.60%	0.10%	0.20%
03-Jun-13	CNY	Chinese HSBC Manufacturing PMI	49.2	49.6	49.6
03-Jun-13	EUR	Manufacturing PMI		47.8	47.8
03-Jun-13	GBP	Manufacturing PMI		50.2	49.8
03-Jun-13	USD	Construction Spending (MoM)		0.80%	-1.70%
03-Jun-13	USD	ISM Manufacturing Index		50.5	50.7
04-Jun-13	AUD	Interest Rate Decision		2.75%	2.75%
04-Jun-13	GBP	Construction PMI		49.6	49.4
04-Jun-13	EUR	PPI (MoM)		-0.30%	-0.20%
04-Jun-13	USD	Trade Balance		-41.0B	-38.8B
05-Jun-13	AUD	GDP (YoY)		2.70%	3.10%
05-Jun-13	EUR	GDP (QoQ)		-0.20%	-0.20%
05-Jun-13	EUR	Retail Sales (MoM)		-0.10%	-0.10%
05-Jun-13	USD	ADP Nonfarm Employment Change		165K	119K
05-Jun-13	USD	ISM Non-Manufacturing Index		53.4	53.1
06-Jun-13	AUD	Trade Balance		0.22B	0.31B
06-Jun-13	GBP	Interest Rate Decision		0.50%	0.50%
06-Jun-13	EUR	Interest Rate Decision		0.50%	0.50%
06-Jun-13	USD	Initial Jobless Claims		345K	354K
07-Jun-13	GBP	Trade Balance		-8.8B	-9.1B
07-Jun-13	USD	Nonfarm Payrolls		168K	165K
07-Jun-13	USD	Unemployment Rate		7.50%	7.50%
07-Jun-13	USD	Consumer Credit		12.50B	7.97B

Date	Curr.	Event	Actual	Forecast	Previous
03-Jun-13	INR	HSBC Markit Manufacturing PMI		51.1	51
05-Jun-13	INR	Indian HSBC Services PMI			50.7
07-Jun-13	INR	Indian FX Reserves, USD			292.08B

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