

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 8533 | 1.32 | CNX IT | 11594 | 1.75 |
| Sensex | 28115 | 1.48 | BANK NIFTY | 18730 | 1.57 |
| DowJones | 17690 | (0.31) | S&P CNX 500 | 7106 | 1.23 |
| Nasdaq | 5128 | (0.01) | CNX FMCG | 20920 | 1.83 |
| Hangseng | 24636 | 0.56 | CNX REALTY | 3526 | 0.30 |
| Shanghai | 3664 | (1.13) | CNX AUTO | 8545 | 1.88 |
| Nikkei | 20585 | 0.30 | CNX ENERGY | 8712 | (0.05) |
| Strait Times | 3200 | (1.52) | CNX PHARMA | 3835 | 1.83 |
| Kospi | 2030 | 0.55 | Advances / Declines | BSE | NSE |
| Taiwan | 8665 | 0.16 | Advances | 1660 | 880 |
| FTSE | 6696 | 0.41 | Declines | 1213 | 608 |
| CAC | 5083 | 0.72 | Unchanged | 128 | 50 |
| DAX | 11309 | 0.46 | Total | 3001 | 1538 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| BANKBARODA | 179.40 | 6.41 |
| SBIN | 269.30 | 4.87 |
| COALINDIA | 440.20 | 4.72 |
| HCLTECH | 1002.00 | 4.60 |
| DRREDDY | 4086.00 | 4.42 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| BHEL | 278.40 | (2.96) |
| KOTAKBANK | 696.00 | (2.90) |
| TATAPOWER | 68.45 | (1.65) |
| BPCL | 933.00 | (1.50) |
| TATASTEEL | 245.70 | (0.99) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| ORISSAMINE | 0.23 | 0.1 | 5 |
| GREAVESCOT | 4.81 | 1.0 | 5 |
| DREDGECORP | 1.39 | 0.3 | 5 |
| RAMCOIND | 5.20 | 1.2 | 4 |
| KOTAKBANK | 6.51 | 1.5 | 4 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|---------|--------|
| USD/INR | 64.005 | (0.001) | (0.00) |
| GBP/INR | 99.836 | 0.005 | 0.01 |
| EUR/INR | 70.163 | 0.089 | 0.13 |
| JPY/INR | 51.550 | 0.020 | 0.04 |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 24492 | (288) |
| Silver (Rs/1kg) | 33595 | (134) |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 47.1 | (3.84) |
| Brent (US\$/BBL) | 52.2 | (2.77) |
| Gold (US/oz) | 1095.1 | 0.16 |
| Silver (US\$/oz) | 14.8 | (0.34) |
| Copper (US\$/MT) | 5220.0 | (1.55) |
| Alum (US\$/MT) | 1594.0 | (1.54) |
| Zinc(US\$/MT) | 1920.0 | (3.27) |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 10.07 | 0.47 |
| HDFC Bank | 62.47 | 0.72 |
| Infosys | 16.91 | (0.04) |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 64.35 | 2.35 |
| Wipro | 12.36 | 0.10 |
| Tata Motors | 29.66 | 0.22 |

Market Sensor

US market closed mildly lower on Friday, the final day of trade for July, as investors digested energy earnings misses and soft data that could push an initial rate hike further out. Dow Jones Industrial Average was down 0.32% or 56.12 points at 17689.86. Nasdaq Composite was down 0.01% or 0.50 points at 5128.28 Standard & Poor's 500 was down 0.23% or 4.79 points at 2103.84.

Indian equity market surged on Friday after the Department of Industrial Policy & Promotion (DIPP) issued a notification introducing composite caps for simplification of the FDI policy for attracting foreign investments in the country. Nifty ended the previous day with a gain of 1.32% or 111.05 at 8532.85. On Friday's trading session, FIIs sold Rs.277.77 Cr in cash market and bought net Rs.2994.23 in derivative segment. Whereas, DII bought net Rs.1021.34 Cr in cash segment.

Global News

- ❖ Business activity in the U.S. Midwest jumped to a six-month high in July, topping economists' forecasts and showing expansion in the region for the first time since April, a report showed on Friday. (CNBC)
- ❖ U.S. consumer sentiment came in slightly below expectations at 93.1, the Survey of Consumers said Friday. (CNBC)
- ❖ Trade negotiators from the United States and 11 other Pacific nations failed to reach final agreement on Friday, with difficult talks on the largest regional trade agreement ever deadlocking over protections for drug companies and access to agriculture markets on both sides of the Pacific. (CNBC)
- ❖ Euro zone annual inflation held steady at 0.2 percent in July, far below the European Central Bank (ECB)'s target and disappointing those who hoped monetary stimulus would provide a quick answer to the region's torpor. (CNBC)
- ❖ Activity in China's services industry quickened slightly in July from the previous month, an official survey showed on Saturday. The official non-manufacturing Purchasing Managers' Index (PMI) stood at 53.9 in July, compared with the previous month's reading of 53.8 and above the 50-point mark that separates growth from contraction on a monthly basis. (Reuters)

Economic News

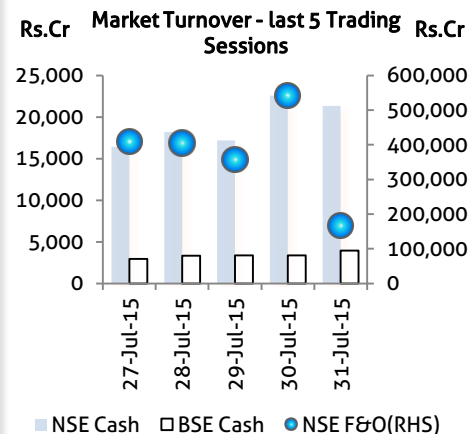
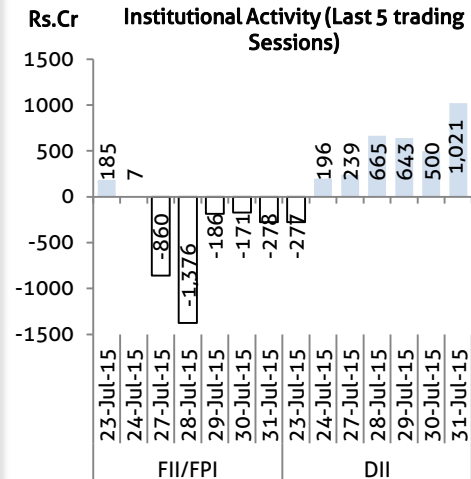
- ❖ Collections for the Prime Minister's National Relief Fund (PMNRF) appear to have been slow at Rs 134.7 crore in the first four months of the current financial year, after it had touched a 10-year high the previous year, when the new government took charge. (BS)
- ❖ The Department of Telecom will undertake special audit to assess the coverage and quality of service of all mobile operators in the metro cities to assess the gravity of problem to call drops. (BS)
- ❖ Finance Minister Arun Jaitley sought Parliament's approval on Friday to increase the spending budget for this fiscal year by \$4 billion, with almost half to be used to inject extra capital into state banks struggling with bad loans. (BS)
- ❖ The government is to buy oilseeds and pulses directly from farmers for the first time this year, in addition to its existing purchases of wheat and rice, to boost production and close a supply gap that has driven its annual import bill up to \$12 billion. (BS)
- ❖ The Reserve Bank is likely to keep the repo rate unchanged in its upcoming third bi-monthly monetary policy meet scheduled on Tuesday, said India Ratings and Research (Ind-Ra) in a note. (BS)
- ❖ Reserve Bank is likely to pause on rates at its ensuing meeting next week, but may go for a rate cut by the end of the year, as further clarity on the monsoon front is awaited, say leading brokerages. (BS)
- ❖ India is seeking a "balanced outcome" at the World Trade Organization's (WTO) tenth ministerial meeting even as it is striving to get a permanent solution to the public stockholding issue for food security purposes. (BS)
- ❖ The Maharashtra government will do well to assess socio-economic and ecological impact of the proposed 35.6-km Mumbai coastal road, which it is flaunting as its pet project and one that it hopes will provide all the answers to maximum city's congestion problems. (BS)
- ❖ Andhra Pradesh is considering import of onions to boost domestic availability of the commodity and to prevent hike in its prices, Chief Secretary I Y R Krishna Rao said here today. (BS)

Domestic News

- ❖ Bharati Shipyard board on Friday approved change of name of the company to Bharati Defence And Infrastructure Limited in turn highlighting the company's focus on the segment going ahead. (BS)
- ❖ ITC chairman Y C Deveshwar said that foreign funded non-government organisations with vested interests were prodding the government to increase taxation on cigarettes, and consequently hurting the company's fortune. (BS)
- ❖ Slowly but steadily, non-banking finance companies (NBFCs), such as Shriram Transport Finance and Bajaj Finance, are claiming the ground vacated by small and medium-sized public sector banks such as Oriental Bank of Commerce, Allahabad Bank, Andhra Bank and UCO Bank, among others. (BS)
- ❖ Karur Vysya Bank on Friday reported a 10.24% growth in net profit for the quarter ended June 30, 2015. (BS)
- ❖ Greaves Cotton, one of India's leading engineering companies, reported a 50.8% jump in its net profit at Rs 43.34 crore for the quarter ended June 30, 2015 as against Rs 28.74 crore recorded in the same period last year. (BS)

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.0985 | 0.0052 | 0.47 |
| GBP-USD | 1.5628 | 0.0026 | 0.17 |
| USD-JPY | 123.86 | (0.2900) | (0.23) |

| Bond Markets | Closing | Chg |
|----------------|---------|----------|
| 10-yr bond | 7.94 | 0.20 bps |
| Interbank call | 7.09 | 7.77 bps |



Domestic News (Cont...)

❖ Alembic Pharmaceuticals reported 8.05 per cent rise in consolidated net profit to Rs 69.88 crore for the first quarter ended June 30, 2015-16, mainly on account of robust sales. (BS)

❖ Titan Company Ltd reported a 14.79 per cent decline in profit after tax at Rs 151.06 crore for the first quarter ended June 30, due to decline in jewellery sales. (BS)

❖ GlaxoSmithKline Pharmaceuticals reported 5.09 per cent decline in its net profit at Rs 93.28 crore for the first quarter ended June 30, hit by supply constraints. (BS)

❖ Retail chain group Shoppers Stop Ltd (SSL) reported a standalone net loss at Rs 21.43 crore in the first quarter ended 30 June, 2015 on account of exceptional item of Rs 23.81 crore. (BS)

❖ Diversified group ITC has set a target of garnering a revenue of Rs 1 lakh crore by 2030 from its FMCG business, as it looks to increase presence in the segment, company's chairman Y C Deveshwar said. (BS)

❖ Sun TV reported 19.10% profit during the quarter ended June 30, 2015 to Rs 197.28 crore as compared to Rs 165.64 crore, during the same period last year. (BS)

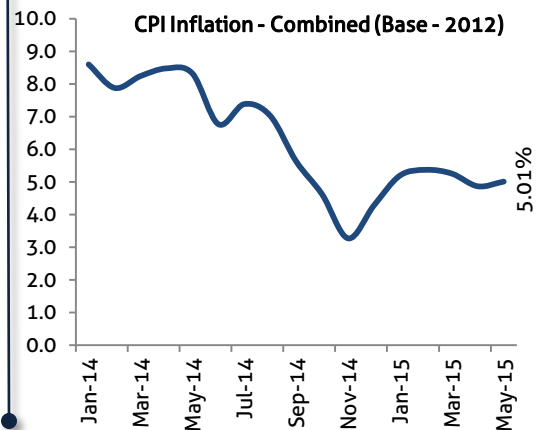
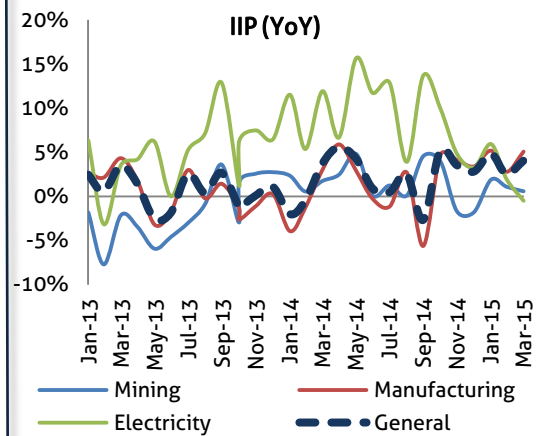
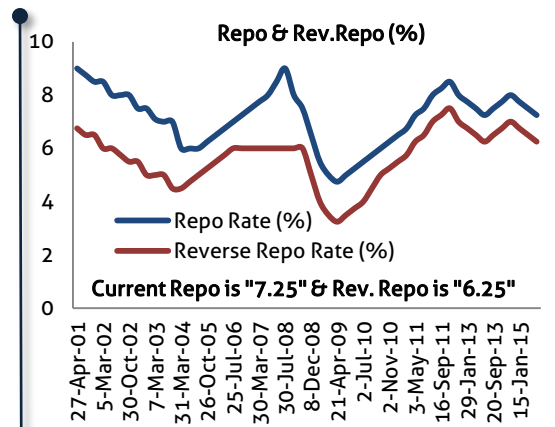
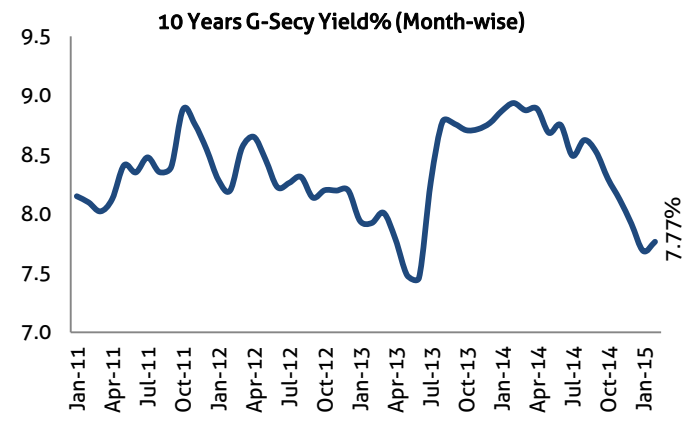
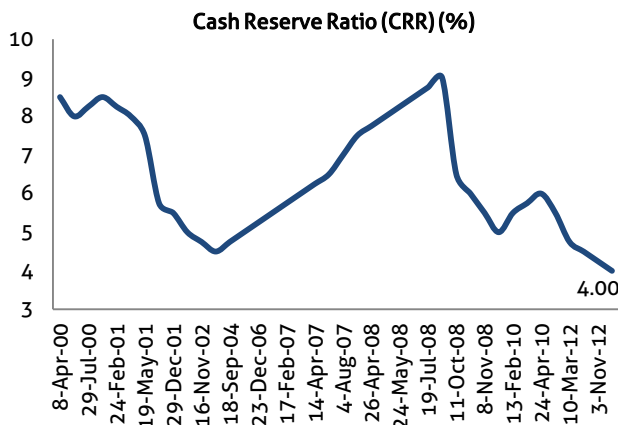
❖ Drug firm Strides Arcolab has received approval from the US health regulator for its Benzonatate softgel capsules used for treating cough caused by cold, and other breathing problems such as pneumonia and asthma. (BS)

❖ Exide Industries' numbers for the June quarter disappointed the Street yet again, with reported revenues down 6% to Rs 1,799 crore while operating profit was down 9% to Rs 265 crore. Consensus estimates pegged the two numbers at Rs 1,943 crore and Rs 298 crore, respectively. (BS)

❖ Commercial vehicle Ashok Leyland has reported a 40 per cent growth in overall sales during the month of July. Total sales of the company rose to 11,022 units in July 2015 from 7,861 units, during July 2014. (BS)

❖ TVS Motor Company has reported a marginal growth of 1.30 per cent in two-wheeler sales during the month of July. Company's domestic sales was dropped during the month of July, due to drop in motorcycle sales, while scooter sales clocked 10 per cent growth. (BS)

❖ Royal Enfield July sales rose 49% to 40,760 units. The company had sold 27,314 units a year ago. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------------------|------------------------------------|----------|-------------|-------|
| 31-Jul-15 | AmtekAuto-Roll Sett | CREDIT SUISSE (SINGAPORE) LIMITED | BUY | 1690000 | 170.1 |
| 31-Jul-15 | Omkar Spl Chem Ltd | PALLADIUM FINSERVE PRIVATE LIMITED | SELL | 147714 | 198.5 |
| 31-Jul-15 | Liberty Shoes Ltd | ANMOL GUPTA | SELL | 103691 | 251.7 |
| 31-Jul-15 | Shyam Century Ferrous Ltd | SUBHAM CAPITAL PRIVATE LIMITED | BUY | 1500000 | 8.6 |
| 31-Jul-15 | Sumeet Ind Limited | SHPL ENTERPRISES PRIVATE LIMITED | BUY | 950879 | 11.9 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|--|----------|-------------|-------|
| 31-Jul-15 | WELSPSY | ASHISH RAMESHCHANDRA KACHOLIA | B | 615,143 | 124.3 |
| 31-Jul-15 | SALZER | MERRILL LYNCH CAPITAL MARKETS ESPANA SA SV | S | 109,750 | 283.9 |
| 31-Jul-15 | 3IINFOTECH | ICICI BANK LIMITED | S | 4,500,000 | 3.8 |
| 31-Jul-15 | AFEL | VIDHI NIKUNJ SHAH | S | 41,589 | 245.1 |
| 31-Jul-15 | PINCON | ANUSHRI TEXTILES PRIVATE LIMITED | S | 56,095 | 109.2 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|------------|-----------|-------------------------------|-------------|
| 506235 | ALEMBICLTD | 03-Aug-15 | Dividend - Rs. - 0.1500 | - |
| 532830 | ASTRAL | 03-Aug-15 | Final Dividend - Rs. - 0.2250 | - |
| 506285 | BAYERCROP | 03-Aug-15 | Buy Back of Shares | 04-Aug-15 |
| 500878 | CEATLTD | 03-Aug-15 | Dividend - Rs. - 10.0000 | - |
| 517544 | CENTUM | 03-Aug-15 | Final Dividend - Rs. - 2.0000 | - |
| 538902 | DHUNTEAIND | 03-Aug-15 | Dividend - Rs. - 7.5000 | - |
| 523708 | EIMCOELECO | 03-Aug-15 | Dividend - Rs. - 5.0000 | - |
| 500133 | ESABINDIA | 03-Aug-15 | Dividend - Rs. - 1.0000 | - |
| 509488 | GRAPHITE | 03-Aug-15 | Dividend - Rs. - 2.0000 | - |
| 534816 | INFRATEL | 03-Aug-15 | Final Dividend - Rs. - 6.5000 | - |
| 517344 | MINDTECK | 03-Aug-15 | Dividend - Rs. - 1.0000 | - |
| 505800 | RANEHOLDIN | 03-Aug-15 | Dividend - Rs. - 7.5000 | - |
| 532713 | SAKUMA | 03-Aug-15 | Dividend - Rs. - 1.0000 | - |
| 506105 | STANROS | 03-Aug-15 | Dividend - Rs. - 6.0000 | - |
| 538987 | TALBROSENG | 03-Aug-15 | Dividend - Rs. - 6.0000 | - |
| 531266 | VSTILLERS | 03-Aug-15 | Dividend - Rs. - 15.0000 | - |
| 500877 | APOLLOTYRE | 04-Aug-15 | Dividend - Rs. - 2.0000 | - |
| 500620 | GESHIP | 04-Aug-15 | Final Dividend - Rs. - 7.0000 | - |
| 524735 | HIKAL | 04-Aug-15 | Final Dividend - Rs. - 0.5000 | - |
| 522064 | HONDAPOWER | 04-Aug-15 | Dividend - Rs. - 6.0000 | - |
| 500116 | IDBI | 04-Aug-15 | Dividend - Rs. - 0.7500 | - |
| 533377 | IPRU1117 | 04-Aug-15 | Temporary Suspension | 05-Aug-15 |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|--------------------------------------|--------|----------|----------|
| 03-Aug-15 | JPY | Manufacturing PMI (Jul) | | | 51.4 |
| 03-Aug-15 | CNY | HSBC Manufacturing PMI (Jul) | | | 48.2 |
| 03-Aug-15 | EUR | Manufacturing PMI (Jul) | | 52.2 | 52.2 |
| 03-Aug-15 | GBP | Manufacturing PMI (Jul) | | 51.6 | 51.4 |
| 03-Aug-15 | USD | Core PCE Price Index (MoM) (Jun) | | 0.10% | 0.10% |
| 03-Aug-15 | USD | Personal Spending (MoM) (Jun) | | 0.20% | 0.90% |
| 03-Aug-15 | USD | Construction Spending (MoM) (Jun) | | 0.60% | 0.80% |
| 03-Aug-15 | USD | ISM Manufacturing PMI (Jul) | | 53.5 | 53.5 |
| 04-Aug-15 | GBP | Nationwide HPI (YoY) (Jul) | | 3.50% | 3.30% |
| 04-Aug-15 | GBP | Construction PMI (Jul) | | 58.4 | 58.1 |
| 04-Aug-15 | EUR | PPI (YoY) (Jun) | | -2.20% | -2.00% |
| 04-Aug-15 | USD | Factory Orders (MoM) (Jun) | | 1.80% | -1.00% |
| 05-Aug-15 | EUR | Markit Composite PMI (Jul) | | 53.7 | 53.7 |
| 05-Aug-15 | USD | MBA 30-Year Mortgage Rate | | | 4.17% |
| 05-Aug-15 | USD | ADP Nonfarm Employment Change (Jul) | | 215K | 237K |
| 05-Aug-15 | USD | Trade Balance (Jun) | | -42.70B | -41.90B |
| 05-Aug-15 | USD | Markit Composite PMI (Jul) | | | 55.2 |
| 05-Aug-15 | USD | ISM Non-Manufacturing PMI (Jul) | | 56.2 | 56 |
| 06-Aug-15 | GBP | Industrial Production (YoY) (Jun) | | 2.20% | 2.10% |
| 06-Aug-15 | GBP | Manufacturing Production (YoY) (Jun) | | 0.50% | 1.00% |
| 06-Aug-15 | GBP | BoE QE Total (Aug) | | | 375B |
| 06-Aug-15 | GBP | Interest Rate Decision (Aug) | | 0.50% | 0.50% |
| 06-Aug-15 | USD | Initial Jobless Claims | | | 267K |
| 07-Aug-15 | GBP | Trade Balance (Jun) | | -9.20B | -8.00B |
| 07-Aug-15 | USD | Nonfarm Payrolls (Jul) | | 222K | 223K |
| 07-Aug-15 | USD | Unemployment Rate (Jul) | | 5.30% | 5.30% |
| 07-Aug-15 | CNY | Trade Balance (Jul) | | | 46.54B |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|-------------------------------------|--------|----------|----------|
| 03-Aug-15 | INR | HSBC Markit Manufacturing PMI (Jul) | | 51 | 51.3 |
| 04-Aug-15 | INR | Interest Rate Decision | | 7.30% | 7.25% |
| 05-Aug-15 | INR | HSBC Services PMI (Jul) | | | 47.7 |
| 05-Aug-15 | INR | M3 Money Supply (2wk) | | | 11.30% |
| 07-Aug-15 | INR | Bank Loan Growth (2wk) | | | 9.40% |
| 07-Aug-15 | INR | Deposit Growth (2wk) | | | 11.70% |

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