

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5551	1.44	CNX IT	8397	0.17
Sensex	18886	1.43	BANK NIFTY	9140	1.00
DowJones	14810	(0.21)	S&P CNX 500	4235	1.42
Nasdaq	3590	(0.84)	CNX FMCG	16828	3.35
Hangseng	22406	1.04	CNX REALTY	155	3.48
Shanghai	2109	0.48	CNX AUTO	4355	0.21
Nikkei	13914	2.51	CNX ENERGY	7539	2.16
Strait Times	3056	0.00	CNX PHARMA	7047	0.95
Kospi	1935	0.53	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8086	0.59	Advances	1400	841
FTSE	6506	1.45	Declines	851	344
CAC	4006	1.84	Unchanged	149	52
DAX	8244	1.74	Total	2400	1237

Nifty Gainers		
Company	Price(Rs)	Chg(%)
JPASSOCIAT	36.35	9.82
INDUSINDBK	383.00	7.36
TATASTEEL	290.70	6.09
DLF	137.00	5.55
RANBAXY	428.90	5.16

Nifty Losers		
Company	Price(Rs)	Chg(%)
KOTAKBANK	627.30	(4.90)
M&M	767.00	(2.07)
TATAPOWER	74.45	(1.85)
HEROMOTOCO	2018.25	(1.38)
ACC	951.85	(1.27)

## Market Sensor

U.S market was closed due to labour day. European shares closed higher on Monday, strong Chinese and European factory data boosted market hopes that the global economy is growing out of stagnation.

Indian market ended higher after China official PMI hit 16-month high in August while India's HSBC-Markit manufacturing PMI for the month of August at 48.5 against 50.1 previous month. Nifty ended the previous trading session with a gain of 1.44% or 78.95 points at 5550.75. On Friday's trading session, FII's bought net Rs.475.92 Cr in cash market and bought net Rs 996.42 in derivative segment. Whereas, DII sold net Rs. 285.81 Cr in cash segment.

**Coming to today's trade, Nifty to remain volatile with crucial intraday support placed at 5510 followed by 5470.**

## Global News

❖ The worst is over for Asian emerging markets after investors pulled billions of dollars last month on concern the U.S. Federal Reserve will start cutting back bond purchases, according to Nomura Holdings Inc. (8604). (Bloomberg)

❖ Malaysia raised fuel prices for the first time since 2010, joining neighboring Indonesia in curbing subsidies that have stretched government budgets and threatened investor confidence. (Bloomberg)

❖ Prime Minister Shinzo Abe faces rising pressure to expand tax relief for Japan's companies after the longest slump in business investment since 2009, setting up a potential battle with the Finance Ministry. (Bloomberg)

❖ A U.K. factory index increased to a 2 1/2-year high in August, while a pickup in Italy and Spain helped euro-area manufacturing expand faster than initially estimated, evidence the region's recovery is building momentum. (Bloomberg)

❖ Euro-area factory output expanded at a faster pace than initially estimated in August, driven by a resurgence in Italy and Spain, as the 17-nation currency bloc's recovery began to build momentum. (Bloomberg)

❖ China's manufacturing strengthened in August, with one index posting its biggest jump in three years, as improving demand abroad and at home underpins a recovery in the world's second-largest economy. (Bloomberg)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
JUBILANT	33.57	0.16	213.78
Britannia Inds	1.52	0.16	9.55
Turbotech Engr	3.36	0.45	7.48
Hexaware Tech	18.39	6.51	2.83
INDIAN FOREX	Closing	Chg	% Chg
USD/INR	65.861	(0.713)	(1.07)
GBP/INR	102.519	(0.824)	(0.80)
EUR/INR	87.058	(1.103)	(1.25)
JPY/INR	66.840	(0.990)	(1.46)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	32000	(250)
Silver (Rs/1kg)	53966	1145

Commodities	Price	% Chg.
Crude (US\$/BBL)	106.9	(0.70)
Brent (US\$/BBL)	114.3	0.26
Gold (US/oz)	1391.3	(0.34)
Silver (US\$/oz)	24.1	2.64
Copper (US\$/MT)	7175.5	1.13
Alum (US\$/MT)	1764.0	(0.65)
Zinc (US\$/MT)	1868.0	(0.51)

ADR	Cl. Values	% Chg.
ICICI Bank	26.02	(0.17)
HDFC Bank	28.98	1.10
Infosys	46.37	0.16
Sterlite Inds.	6.00	0.07
Dr. Deddy's Labs	33.27	(0.23)
Wipro	9.02	(0.05)
Tata Motors	22.32	(0.51)

## Economic News

❖ Scrambling for remedies as investors' faith in India sagged, the government said last week it fast-tracked approval for a slew of infrastructure projects worth \$28 billion: but the stroke of a pen in New Delhi will not be enough. (BS)

❖ Merchandise export in August is expected to be in double-digits once again and this upward trend is expected to continue in the months to come, according to commerce secretary SR Rao. (BS)

❖ Late last month, with their doors shut to the mounting market panic outside as investors fled the country, India's cabinet ministers gathered to give final approval to a cheap food scheme for the poor. (BS)

❖ The manufacturing sector deteriorated for the first time in almost four years in August, according to widely-tracked HSBC Purchasing Managers' Index (PMI) released. (BS)

❖ The government is considering raising duties on non-essential items - from apples to air-conditioners - that have an annual import bill of \$1 billion each. (BS)

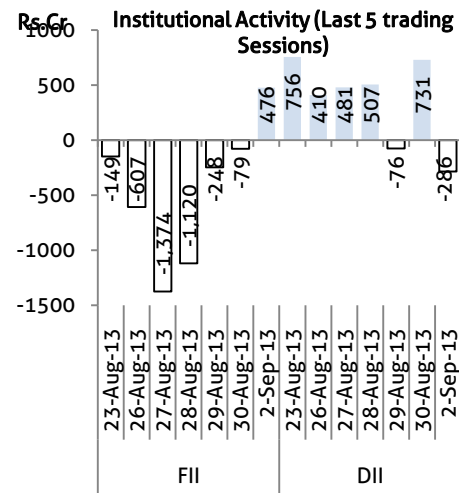
❖ Government is looking at concerns raised by many over FDI policy for the pharma sector amidst increasing number of acquisitions of domestic firms by MNCs, Commerce and Industry Minister Anand Sharma said. (BS)

❖ Employees' Provident Fund Organisation (EPFO) said they are working on a universal number system for its four-crore active subscribers. (BS)

❖ Results of a proposed sampling of domestic coal to be supplied to power projects will be binding on both the seller and the buyer even if the purchaser declines to participate in the process. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3191	(0.0001)	(0.01)
GBP-USD	1.5552	0.0008	0.05
USD-JPY	99.38	0.06	0.05

Bond Markets	Closing	Chg
10-yr bond	8.79	-20.2 bps
Interbank call	10.21	-9.0 bps



## Domestic News

❖ Reliance General Insurance Company launched a health plan last month called Reliance 'HealthGain'. The company said that this product was designed to focus and support the healthcare needs of women. (BS)

❖ India is amidst a financial crisis which is likely to stay for quite some time resulting into squeeze in consumer spending. In such hard times, small is beautiful for the FMCG players at the moment. (BS)

❖ Kishore Biyani-led Future group has launched a new venture called Big Bazaar direct across the country. (BS)

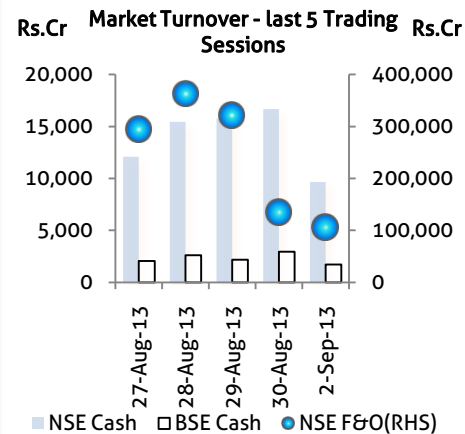
❖ Don't fall prey to the pitch note of insurance agents, caution financial planners. But, offlate your phone and mailbox must have seen messages sent by agents pushing you to buy life insurance as soon as possible. (BS)

❖ Country's largest car-maker Maruti Suzuki India (MSI) reported 61.24% increase in total sales in August at 87,323 units as against 54,154 units in the same month last year. (BS)

❖ Property registrations in Mumbai and its suburbs have seen a 14% growth on a yearly basis in the first four months of financial year 2014, said a new report. (BS)

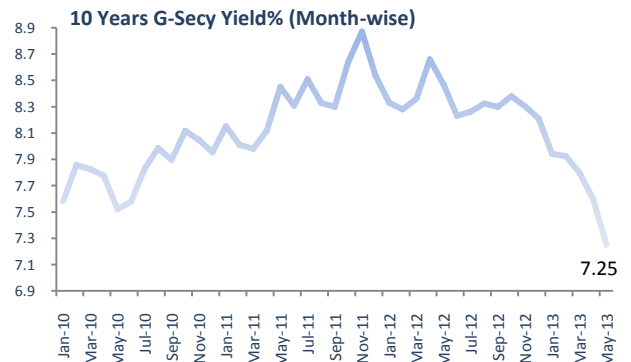
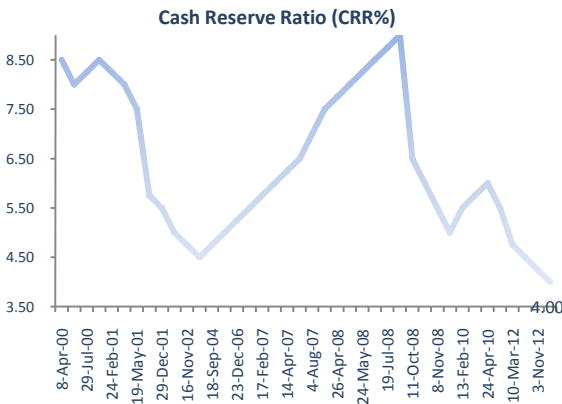
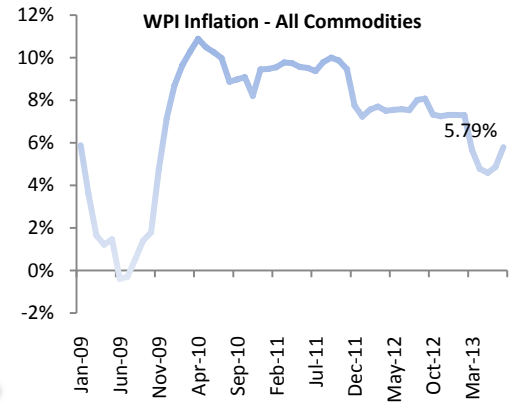
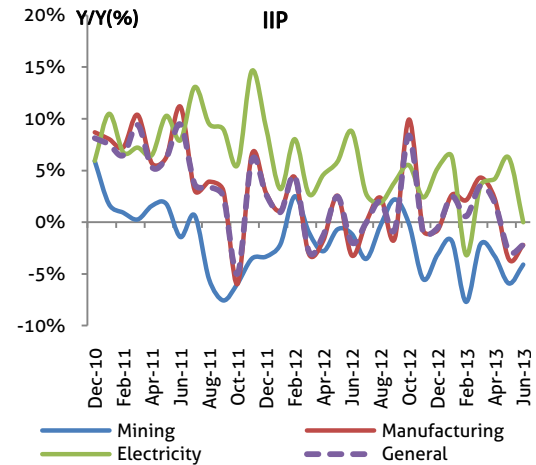
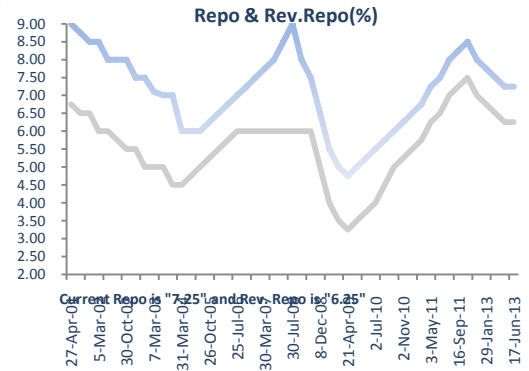
❖ The country's largest two-wheeler maker Hero MotoCorp said it will resume from tomorrow normal operations at its Haridwar plant, which was hit by workers' agitation last week. (BS)

❖ The Coal Ministry has selected global consultancy firm Deloitte, from among the nine shortlisted companies, for a study on restructuring of state-owned Coal India Ltd (CIL) (BS)



## Domestic News (Cont...)

- ❖Larsen & Toubro (L&T) said the water and renewable energy business of its construction division bagged new contracts worth Rs 1,141 crore in August. (BS)
- ❖CBI opposed in a Delhi court the plea of Swan Telecom promoter Shahid Usman Balwa, facing trial in the 2G spectrum case, seeking exemption from personal appearance, saying the agency has got "information" that he has travelled abroad without prior permission. (BS)
- ❖State-owned Oil and Natural Gas Corp (ONGC) and Essar Oil have been shortlisted to bid for development of Iraq's \$4.4 billion Nassiriya oil field and the construction of a new 300,000 barrels per day refinery. (BS)
- ❖Car makers Maruti Suzuki, Honda and Hyundai posted increase in their domestic sales in August, while others including Mahindra, Toyota and Tata Motors reported declines amid a continuous slowdown in the market. (BS)
- ❖Baring Private Equity Asia's Rs 1,058 crore open offer for acquisition of 26% in IT & BPO services firm Hexaware is expected to open on October 18 and close on October 31, 2013. (BS)
- ❖To lure fresh consumers to new product categories, especially in the smaller towns, fast-moving consumer goods (FMCG) companies successfully have adopted the sachets model quite a few years back. (BS)
- ❖Tata group's IT firm TCS attained a market valuation of Rs 4 lakh crore -- becoming the second company in Indian markets after Reliance Industries to cross this milestone. (BS)
- ❖International retail chains may be in a wait and watch mode before starting their operations in this country, but their Indian counterparts are gearing up for competition that foreign investment is sure to bring. Top representatives of Indian chains such as Reliance Retail, Shoppers Stop, Trent, Mahindra Retail, Titan and Godrej Nature are likely to travel to the UK next month to pick up tips on best practices in modern retail operations. (BS)
- ❖State-run NTPC is likely to bid for two ultra mega power projects (UMPPs) worth Rs 20,000 crore each in Odisha and Tamil Nadu, a top company executive said . (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
2-Sep-13	Multi Commodity Exchange	BANK OF INDIA	SELL	525000	392.6
2-Sep-13	Financial Technologies (I	QUADEYE SECURITIES PRIVATE LIMITED	BUY	312171	116.86
2-Sep-13	Financial Technologies (I	CROSSEAS CAPITAL SERVICES PVT. LTD.	SELL	287411	118.78
2-Sep-13	Financial Technologies (I	DEVENDRAKUMAR DHARAMVEER SHARMA	SELL	233305	118.15
2-Sep-13	ARSS Infra Proj. Ltd	TAO BUILDERS AND DEVELOPERS PVT LTD	BUY	200000	16.26

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
2-Sep-13	JUBILANT	JUBILANT STOCK HOLDING PRIVATE LIMITED	B	3,300,000	72.95
2-Sep-13	Financial Tech	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	256,036	118.55
2-Sep-13	Looks Health	DIPAK KALYANJI TANNA	S	96,800	270.68
2-Sep-13	Jolly Plast	THAKUR SHIKHAR HITENDRA	S	56,000	258.87
2-Sep-13	MODINATURAL	ANIL MODI	B	499,000	6.52

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532456	Compuage Info	03-Sep-13	Final Dividend - Rs.1.00	-
532333	HB Portfolio	03-Sep-13	Dividend - Rs.1.50	-
500182	Hero MotoCorp	03-Sep-13	Dividend - Rs.60.00	-
534309	National Bldg Const	03-Sep-13	Dividend - Rs.3.75	-
513121	Oricon Enter-\$	03-Sep-13	Dividend - Rs.0.44	-
532701	Sree Sakthi Pap	03-Sep-13	Dividend - Rs.1.50	-
507205	Tilaknagar Inds-\$	03-Sep-13	Final Dividend - Rs.0.80	-
530477	Vikram Thermo	03-Sep-13	Dividend - Rs.1.50	-
504646	Bhagwati Auto	04-Sep-13	Dividend - Rs.0.70	-
511034	Jindal Drill	04-Sep-13	Dividend - Rs.0.50	-
530299	Kothari Prod	04-Sep-13	Dividend - Rs.20.00	-
526423	Kriti Inds-\$	04-Sep-13	Dividend - Rs.0.15	-
533210	KRITI NUTRI	04-Sep-13	Dividend - Rs.0.06	-
507836	Mac Charles	04-Sep-13	Dividend - Rs.6.00	-
500265	Maharashtra Seam	04-Sep-13	Dividend - Rs.6.00	-
502165	OCL India	04-Sep-13	Final Dividend - Rs.1.50	-
535322	Repco Home Fin	04-Sep-13	Dividend - Rs.1.10	-
533206	SJVN	04-Sep-13	Dividend - Rs.0.96	-
501386	Swastik Safe	04-Sep-13	Dividend - Rs.1.00	-
532830	Astral Poly	05-Sep-13	Stock Split from Rs. 5/- to Rs.2/-	09-Sep-13
500048	BEML	05-Sep-13	Dividend - Rs.2.50	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
2-Sep-13	CNY	Chinese Manufacturing PMI		50.6	50.3
2-Sep-13	JPY	Capital Spending (YoY)			-3.90%
2-Sep-13	CNY	Chinese HSBC Manufacturing PMI			50.1
2-Sep-13	EUR	Manufacturing PMI		51.3	51.3
2-Sep-13	GBP	Manufacturing PMI		55	54.6
3-Sep-13	GBP	Construction PMI		56.8	57
3-Sep-13	EUR	PPI (MoM)		0.10%	
3-Sep-13	USD	Construction Spending (MoM)		0.40%	-0.60%
3-Sep-13	USD	ISM Manufacturing Index		54	55.4
4-Sep-13	CNY	Chinese HSBC Services PMI			51.3
4-Sep-13	GBP	Services PMI		59	60.2
4-Sep-13	EUR	GDP (QoQ)		0.30%	0.30%
4-Sep-13	EUR	Retail Sales (MoM)		0.40%	-0.50%
4-Sep-13	USD	Trade Balance		-38.5B	-34.2B
5-Sep-13	JPY	BOJ Target Rate			
5-Sep-13	GBP	Interest Rate Decision		0.50%	0.50%
5-Sep-13	EUR	Interest Rate Decision		0.50%	0.50%
5-Sep-13	USD	ADP Nonfarm Employment Change		180K	200K
5-Sep-13	USD	Initial Jobless Claims		330K	331K
5-Sep-13	USD	Factory Orders (MoM)		-3.40%	1.50%
5-Sep-13	USD	ISM Non-Manufacturing Index		55	56
6-Sep-13	GBP	Industrial Production (YoY)		-1.70%	1.20%
6-Sep-13	GBP	Manufacturing Production (YoY)		-0.80%	2.00%
6-Sep-13	GBP	Trade Balance		-8.15B	-8.08B
6-Sep-13	USD	Nonfarm Payrolls		180K	162K
6-Sep-13	USD	Unemployment Rate		7.40%	7.40%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
2-Sep-13	INR	HSBC Markit Manufacturing PMI		49.9	50.1
4-Sep-13	INR	Indian HSBC Services PMI			47.9
4-Sep-13	INR	Indian M3 Money Supply			12.20%
6-Sep-13	INR	Indian Bank Loan Growth			16.60%

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