

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8182	(0.71)	CNX IT	11001	(0.84)
Sensex	27011	(0.79)	BANK NIFTY	18338	0.19
DowJones	18017	0.99	S&P CNX 500	6750	(0.47)
Nasdaq	5001	1.20	CNX FMCG	19511	(1.11)
Hangseng	28133	(0.94)	CNX REALTY	3485	(0.60)
Shanghai	4442	(0.78)	CNX AUTO	8188	(1.09)
Nikkei	19532	0.06	CNX ENERGY	8332	0.35
Strait Times	3487	0.01	CNX PHARMA	12058	0.12
Kospi	2127	(0.72)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9820	(0.34)	Advances	1269	658
FTSE	6986	0.36	Declines	1433	815
CAC	5046	0.14	Unchanged	124	70
DAX	11454	0.19	Total	2826	1543

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BHEL	240.65	3.66
AXISBANK	570.00	3.27
LUPIN	1777.95	1.94
RELIANCE	865.00	1.76
ASIANPAINT	765.05	1.41

Nifty Losers		
Company	Price(Rs)	Chg(%)
IDEA	175.50	(3.33)
ACC	1439.95	(3.00)
ZEEL	313.00	(2.42)
AMBUJACEM	232.70	(2.35)
TATAMOTORS	509.50	(2.19)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
RELAXO	2.52	0.3	9
KPIT	33.16	5.8	6
WELCORP	11.65	2.3	5
MANINDS	12.38	2.6	5
GRASIM	0.23	0.1	3

Indian Forex	Closing	Chg	% Chg
USD/INR	63.578	0.376	0.59
GBP/INR	97.986	0.977	1.01
EUR/INR	70.533	1.194	1.72
JPY/INR	53.530	0.450	0.85

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27100	105
Silver (Rs/1kg)	37375	154

Commodities	Price	% Chg.
Crude (US\$/BBL)	59.2	0.82
Brent (US\$/BBL)	66.5	1.34
Gold (US/oz)	1174.5	(2.41)
Silver (US\$/oz)	16.1	(2.36)
Copper (US\$/MT)	6362.0	4.24
Alum (US\$/MT)	1890.5	1.51
Zinc(US\$/MT)	2355.5	2.95

ADR	Cl. Values	% Chg.
ICICI Bank	10.82	(0.11)
HDFC Bank	56.66	(0.18)
Infosys	31.19	0.21
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	52.79	0.81
Wipro	11.59	0.12
Tata Motors	41.31	0.12

## Market Sensor

US market closed about 1 percent higher on Friday, recovering from Thursday's selloff, as investors eyed higher Treasury yields and looked for signs of economic growth. Dow Jones Industrial Average on Friday was up 1.03% or 183.54 points at 18024.06. Nasdaq Composite was up 1.29% or 63.97 points at 5005.39. Standard & Poor's 500 was up 1.09% or 22.78 points at 2108.29.

Indian equity market upheld its negative bias on the expiry day of the April contract. Weak global cues, delayed government policy implementation USDINR appreciation and higher oil price are the major concerns in the market. Nifty ended the previous day with a decline 0.71% or 58.25 at 8181.50. On Thursday's trading session, FII's sold Rs.3157.61 Cr in cash market and bought net Rs.519.09 in derivative segment. Whereas, DII bought net Rs.2460.8 Cr in cash segment.

## Global News

❖ Most top credit rating agencies say they would not cut Greece's rating to default if it misses a payment to the International Monetary Fund or European Central Bank, a stance that could keep vital ECB funding flowing into the financial system. (Reuters)

❖ China's factories stayed stuck in the slow lane in April while Japanese output went into reverse and South Korea suffered its worst export performance in two years, adding urgency to calls for more state stimulus in all three economies. (Reuters)

❖ U.S. factory activity failed to gain steam in April after slowing for five straight months and demand for automobiles softened, suggesting the economy was struggling to find momentum after growth almost stalled in the first quarter. (Reuters)

❖ Japan's core consumer inflation edged up in March but weak demand is keeping firms from raising prices, a perennial problem in the world's third-biggest economy as it struggles to shake off years of deflation despite Tokyo's radical stimulus drive. (Reuters)

❖ The pace of U.S. manufacturing growth held at its slowest in almost two years in April, as a rebound in new orders was offset by employment shrinking to its lowest level in more than five years, according to an industry report released on Friday. (CNBC)

## Economic News

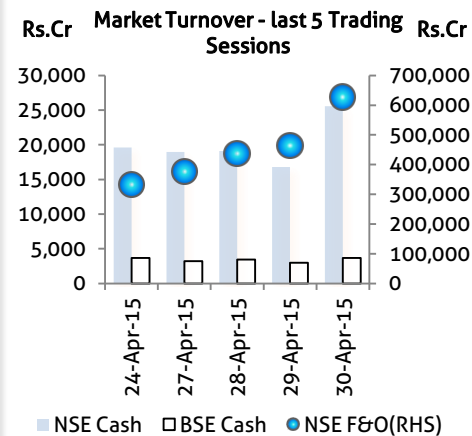
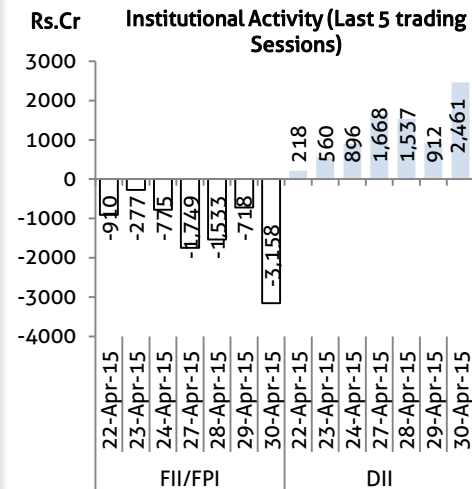
- ❖ Typically, state-owned oil marketing firms — Hindustan Petroleum Corporation, Bharat Petroleum Corporation and Indian Oil Corporation (IOC) — revise the prices of diesel and petrol around the first and 15th of every month, taking into account the average cost of import and the rupee-dollar exchange rate the previous fortnight. (BS)
- ❖ Notwithstanding recommendation by government panels, Railways Minister Suresh Prabhu has outrightly ruled out privatisation of the public transporter, saying it was a "bogey" being raised by those who do not want any change. (BS)
- ❖ Labour efficiency and technology development are two critical issues to deliberate upon in the next phase of 'Make in India', according to Boston Consulting Group (BCG) India MD Arindam Bhattacharya. (BS)
- ❖ The Fertiliser Ministry has moved a Cabinet note on formulating a new urea policy that aims at higher domestic production of the soil nutrient and balanced use of fertilisers. (BS)
- ❖ The government may impose anti-dumping duty of up to \$1.22 per piece on Chinese electronic calculators to protect the domestic makers from cheap imports. (BS)
- ❖ On the lines of Jan Dhan mega rollout, Prime Minister Narendra Modi will launch on May 9 social security insurance and pension schemes in Kolkata, while other ministers will unveil them in different cities. (BS)
- ❖ French companies are looking at 10% growth in their investments in India amidst growing ties between both the nations and Prime Minister Narendra Modi's recent visit to France. (BS)
- ❖ Logging fresh one-year high, India's exposure to US government securities reached \$101.7 billion as the country purchased nearly \$10 billion worth bonds in just one month. (BS)
- ❖ The drop in wholesale prices of essential vegetables in 2014-15 compared with the previous year did not reflect in the retail segment, which rose sharply during the period, according to a study by ASSOCHAM. (BS)
- ❖ Inflation is likely to average 3.7 per cent in 2015-16, higher than the moderate growth of 2 per cent logged in the last financial year, says a Dun & Bradstreet report. (BS)
- ❖ Chinese telecom gear maker ZTE's software arm, ZTEsoft, plans to invest Rs 600 crore in smart city projects in India over a period of 5 years. (BS)
- ❖ Gearing up to roll out its '100 smart cities' scheme across the country, the government is likely to finalise the guidelines for the Rs 48,000 crore mega project next week. (BS)
- ❖ The state oil marketing companies increased jet fuel price by 0.5% from Thursday midnight. The minor increase comes after a 2% cut in jet fuel price in April. In March 2015, the oil companies had raised the jet fuel price by 8%, the first increase since last July 2014. (BS)

## Domestic News

- ❖ The increase in office space absorption in the last three quarters in Hyderabad is expected to generate higher demand for residential units in the next six months, according to market observers. (BS)
- ❖ In a major restructuring exercise, Aditya Birla Group announced merger of all its branded apparel businesses into one entity, Aditya Birla Fashion and Retail Ltd, through an all-share deal. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1199	(0.0025)	(0.22)
GBP-USD	1.5148	(0.0203)	(1.32)
USD-JPY	120.15	0.77	0.64

Bond Markets	Closing	Chg
10-yr bond	7.85	2.50 bps
Interbank call	7.70	19.81 bps



## Domestic News (Cont...)

❖ The multi-billion deal for 36 Rafale fighter jets could see French defence major Dassault Aviation entering into a joint venture with state-run HAL or any private player to set up a base here for augmenting its existing production line. (BS)

❖ Facing a multi-agency scrutiny, Diageo-owned United Spirits may have to restate its financial accounts, even as some investor groups have begun to question the UK-based parent's long silence on allegations against the erstwhile main promoters, Vijay Mallya-led UB Group. (BS)

❖ Slamming "ham-handed enforcement" action against e-commerce major Snapdeal for online sale of prescription drugs, former Union Minister Sachin Pilot said the move goes against the government's stated position of promoting businesses and home-grown entrepreneurs. (BS)

❖ Making a fresh bid to locate Sahara investors eligible for refunds, capital markets regulator Sebi has asked the bondholders of two Sahara firms to submit their claims along with the proof of investments. (BS)

❖ Paytm's mobile wallet will soon be accepted at quick service restaurants (QSRs), including Domino's and Cafe Coffee Day, as the Alibaba-backed company forays into the offline retail space in the next two months. (BS)

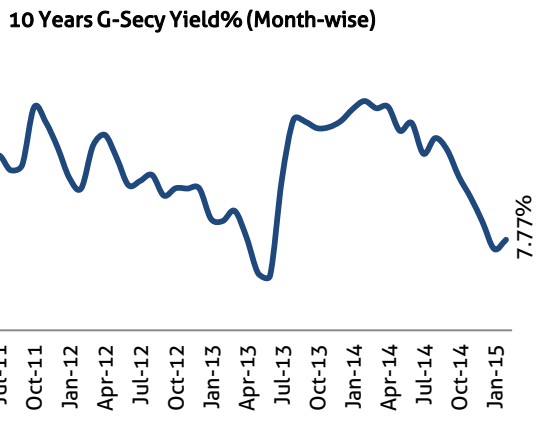
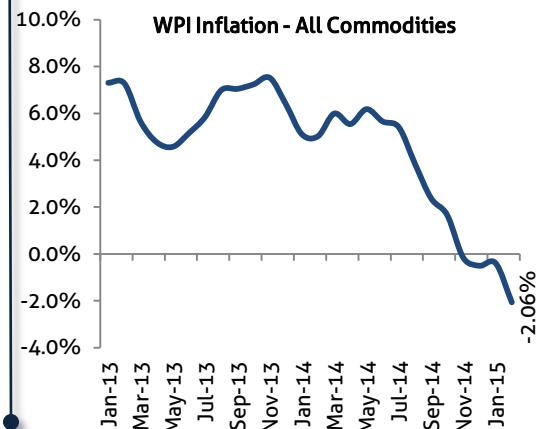
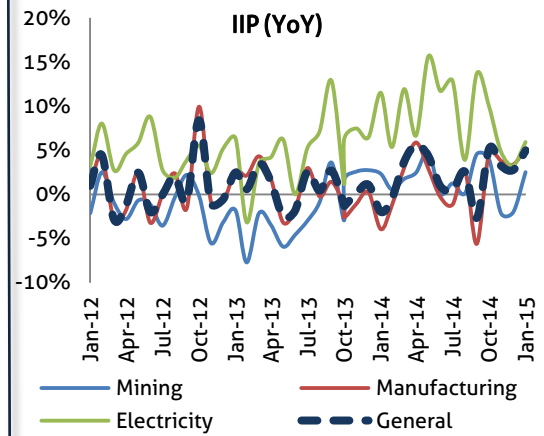
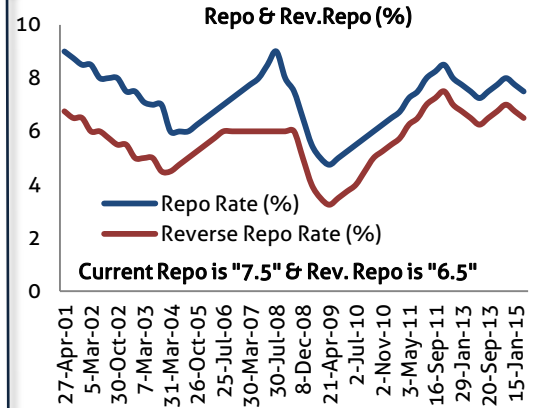
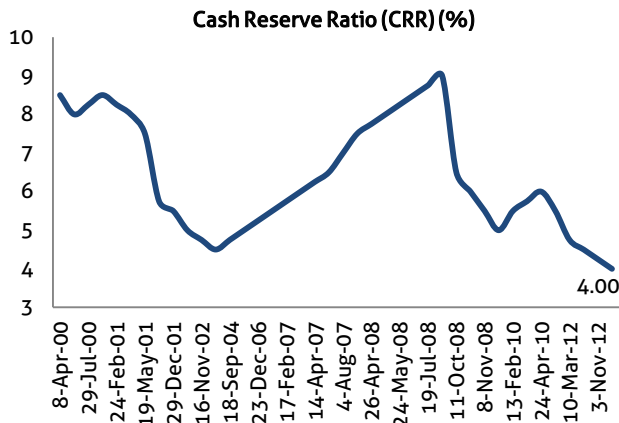
❖ Japanese auto maker Honda has questioned its erstwhile Indian partner Hero's claim of 102.5 km/litre fuel economy rate for Splendor iSmart bike, saying "such claims are misleading and are far from reality". (BS)

❖ State-owned gas utility GAIL India Ltd will stop LNG imports at the Dabhol terminal from this month as the onset of monsoon will make operations difficult without a breakwater. (BS)

❖ State-run BSNL is targeting a revenue of Rs 500 crore in the current financial year by utilising its land bank and monetisation of 75,000 towers, among others. (BS)

❖ Leading corporate houses are likely to issue rupee-denominated offshore bonds aka 'Masala Bonds' worth \$6 billion this year and double it to \$12 billion next fiscal, says a report. (BS)

❖ To revive the fortunes of what Ratan Tata called 'People's Car', Tata Motors is all set to unveil its new avatar, GenX Nano, positioning it as an aspirational vehicle. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Apr-15	Justdial Ltd.	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	SELL	643171	1068.1
30-Apr-15	VRL Logistics Limited	GOLDMAN SACHS INDIA FUND LTD	BUY	1719840	295.2
30-Apr-15	KPIT Cummins Infosystems	PCV LUX SCA	SELL	3148520	102.1
30-Apr-15	PTC India Limited	MARFATIA NISHIL SURENDRA	BUY	2003502	72.7
30-Apr-15	Welspun Projects Limited	MERRILL LYNCH CAPITAL MARKETS ESPANA S.A. SVB	BUY	1500000	40.0

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Apr-15	VRLLOG	GOLDMAN SACHS INDIA FUND LIMITED	B	1,223,962	299.3
30-Apr-15	STAR	ROUTE ONE FUND I LP	B	315,000	1013.8
30-Apr-15	VISASTEEL	VISA INFRASTRUCTURE LIMITED	S	2,650,000	17.2
30-Apr-15	AIFL	NNM SECURITIES PVT LTD	B	161,800	224.2
30-Apr-15	INTLCONV	DIPAK KUMAR MODI	B	540,000	35.5

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532622	GDL	05-May-15	2nd Interim Dividend - Rs.3.00	06-May-15
532424	GODREJCP	05-May-15	Interim Dividend - Rs.2.50	06-May-15
532129	HEXAWARE	05-May-15	Interim Dividend - Rs.2.00	-
532733	SUNTV	05-May-15	Interim Dividend - Rs.-	06-May-15
532343	TVSMOTOR	05-May-15	2nd Interim Dividend - Rs.1.15	06-May-15
501270	ZCHANAIN	05-May-15	BONUS 3:1	06-May-15
500870	CASTROLIND	06-May-15	Final Dividend - Rs.4.00	-
535789	IBULHSGFIN	06-May-15	Interim Dividend - Rs.9.00	07-May-15
532960	IBVENTURES	06-May-15	Interim Dividend - Rs.1.00	07-May-15
500150	FOSECOIND	07-May-15	1st Interim Dividend - Rs.3.50	08-May-15
507488	GMBREW	08-May-15	Dividend - Rs.2.50	-
500189	HINDUJAVEN	08-May-15	Interim Dividend - Rs.15.00	11-May-15
500325	RELIANCE	08-May-15	Dividend - Rs.10.00	-
532475	APTECHT	11-May-15	Interim Dividend - Rs.1.75	12-May-15
531233	RASIELEC	11-May-15	Stock Split from Rs.10/- to Rs.2/-	12-May-15
520056	SUNCLAYLTD	13-May-15	3rd Interim Dividend - Rs.-	14-May-15
532200	MYSOREBANK	14-May-15	Final Dividend - Rs.1.00	-
538713	ATISHAY	18-May-15	Dividend - Rs.0.60	-
500790	NESTLEIND	19-May-15	Final Dividend - Rs.12.50	-
590043	HARITASEAT-\$	22-May-15	Interim Dividend - Rs.-	25-May-15
523445	RIIL	26-May-15	Dividend - Rs.3.50	-
532735	RSYSTEMINT*	03-Jun-15	Final Dividend - Rs.0.95	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
04-May-15	EUR	Manufacturing PMI (Apr)		51.9	51.9
04-May-15	USD	Factory Orders (MoM) (Mar)		2.00%	0.20%
05-May-15	GBP	Construction PMI (Apr)		57.5	57.8
05-May-15	EUR	PPI (YoY) (Mar)		-2.30%	-2.80%
05-May-15	USD	Trade Balance (Mar)		-40.30B	-35.40B
05-May-15	USD	Markit Composite PMI (Apr)			57.4
05-May-15	CNY	HSBC Services PMI (Apr)			52.3
06-May-15	EUR	Markit Composite PMI (Apr)		53.5	53.5
06-May-15	EUR	Retail Sales (YoY) (Mar)			3.00%
06-May-15	USD	Nonfarm Productivity (QoQ) (Q1)		-2.00%	-2.20%
07-May-15	USD	Initial Jobless Claims			262K
07-May-15	USD	Consumer Credit (Mar)		16.00B	15.52B
07-May-15	CNY	Trade Balance (Apr)			3.08B
08-May-15	GBP	Trade Balance (Mar)		-9.80B	-10.34B
08-May-15	USD	Unemployment Rate (Apr)		5.40%	5.50%
08-May-15	USD	Wholesale Inventories (MoM) (Mar)		0.30%	0.30%
08-May-15	CNY	CPI (YoY) (Apr)			1.40%
08-May-15	CNY	PPI (YoY) (Apr)			-4.60%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
04-May-15	INR	HSBC Markit Manufacturing PMI (Apr)			52.10
06-May-15	INR	HSBC Services PMI (Apr)			53.00

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