

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5341	(3.77)	CNX IT	8259	(1.64)
Sensex	18235	(3.45)	BANK NIFTY	8664	(5.20)
DowJones	14834	0.16	S&P CNX 500	4093	(3.36)
Nasdaq	3613	0.63	CNX FMCG	16049	(4.63)
Hangseng	22290	(0.47)	CNX REALTY	147	(4.88)
Shanghai	2119	(0.19)	CNX AUTO	4291	(1.45)
Nikkei	13881	(0.70)	CNX ENERGY	7255	(3.77)
Strait Times	3029	(0.85)	CNX PHARMA	6871	(2.49)
Kospi	1930	(0.20)	Advances / Declines	BSE	NSE
Taiwan	8066	(0.28)	Advances	766	283
FTSE	6468	(0.58)	Declines	1509	893
CAC	3974	(0.80)	Unchanged	141	56
DAX	8181	(0.77)	Total	2416	1232

Nifty Gainers		
Company	Price(Rs)	Chg(%)
LUPIN	841.10	2.59
COALINDIA	261.00	1.14
CAIRN	322.80	0.91
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Nifty Losers		
Company	Price(Rs)	Chg(%)
AXISBANK	772.25	(10.65)
INDUSINDBK	348.00	(8.67)
DLF	126.85	(7.17)
RELINFRA	326.40	(7.11)
PNB	407.80	(7.05)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Whirlpool	5.04	0.03	147.34
SKS Microfinance	34.67	0.69	50.55
Sobha Dev	2.58	0.08	31.81
Prestige Estates	7.04	0.45	15.80
Radico Khaitan	12.04	1.01	11.94

Indian Forex	Closing	Chg	% Chg
USD/INR	66.888	1.027	1.56
GBP/INR	103.950	1.431	1.40
EUR/INR	88.095	1.037	1.19
JPY/INR	67.180	0.340	0.51

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	33200	1200
Silver (Rs/1kg)	56435	2469

Commodities	Price	% Chg.
Crude (US\$/BBL)	108.3	1.26
Brent (US\$/BBL)	115.7	1.25
Gold (US/oz)	1413.6	1.60
Silver (US\$/oz)	24.3	0.83
Copper (US\$/MT)	7183.5	0.11
Alum (US\$/MT)	1773.0	0.51
Zinc(US\$/MT)	1868.0	0.00

ADR	Cl. Values	% Chg.
ICICI Bank	25.49	(0.53)
HDFC Bank	27.59	(1.39)
Infosys	45.45	(0.92)
Sterlite Inds.	6.00	0.00
Dr. Deddy's Labs	32.45	(0.82)
Wipro	8.89	(0.13)
Tata Motors	22.31	(0.01)

Market Sensor

U.S market closed out a choppy session in the black on the first trading day of September, thanks to a handful of upbeat economic reports, but ongoing worries over Syria kept a lid on gains. Dow Jones Industrial Average was up 0.16% or 23.65 points at 14833.96. Nasdaq Composite was up 0.63% or 22.74 points at 3612.61. Standard & Poor's 500 was up 0.42% or 6.80 points at 1639.77.

Indian market nosedived in the previous trading session on concern of military attack by US on Syria coupled by rupee depreciating near to its all time low followed by S&P reiterated that chances of downgrade of India's sovereign rating to junk led domestic indices sharply lower. Nifty ended the previous trading session with a decline of 3.77% or 209.30 points at 5341.45. On Friday's trading session, FII sold net Rs.716.16 Cr in cash market and sold net Rs 602.23 in derivative segment. Whereas, DII bought net Rs. 596.43 Cr in cash segment.

Coming to today's trade, Nifty to remain volatile with negative bias, crucial intraday support placed at 5270 followed by 5240.

Global News

❖ Manufacturing is poised to make a bigger contribution to the U.S. expansion after a factory barometer unexpectedly climbed in August to the highest level in more than two years. (Bloomberg)

❖ Ronald Coase, the British-born University of Chicago economist whose Nobel Prize-winning work on the role of corporations stemmed from visits in the early 1930s to American companies including Ford Motor Co. and Union Carbide, has died. He was 102. (Bloomberg)

❖ Chinese President Xi Jinping said the government opted for slower growth this year to allow it to adjust the structure of the nation's economy. (Bloomberg)

❖ Construction spending in the U.S. increased in July to the highest level in four years, propelled by gains in residential real estate. (Bloomberg)

❖ Switzerland's economy defied the recession that afflicted its neighbors to notch up a year of uninterrupted growth, underlining the importance of the country's currency ceiling as it marks its second anniversary. (Bloomberg)

Economic News

❖ Goldman Sachs has lowered India's growth forecast for the current financial year to 4% from 6% earlier and is expecting the rupee to touch 72 against the US dollar in next 6 months. (BS)

❖ Standard & Poor's considers chances of a credit ratings downgrade for India higher than for Indonesia, Bloomberg News reported on Tuesday, citing comments made by an analyst of the credit rating agency at a briefing in Seoul. (BS)

❖ To improve manufacturing in MSME sector, a government-panel is soon likely to suggest easier entry and exit norms along with easy flow of credit in its report to Cabinet Secretary Ajit Kumar Seth. (BS)

❖ The commerce and industry ministry is soon going to move the Cabinet Committee on Economic Affairs (CCEA) over resumption of iron ore exports in order to augment foreign exchange reserves. The move has been prompted by an unprecedented depreciation in the rupee value. (BS)

❖ Amidst depreciating rupee, Prime Minister's Economic Advisory Council Chairman C Rangarajan pitched for substantial increase in diesel prices to meet the fiscal deficit target. (BS)

❖ The Government's ambitious Food Security programme targeted towards the country's poor will not yield desired outcomes unless the public distribution system (PDS) is revamped, PHD Chamber of Commerce said. (BS)

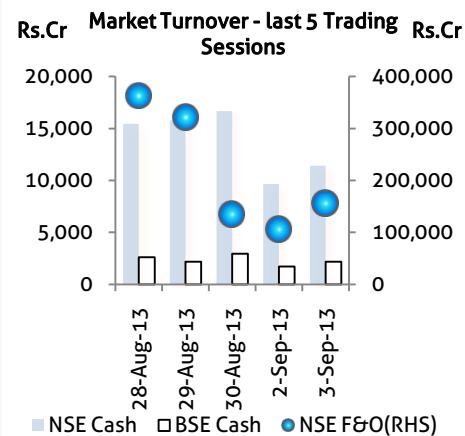
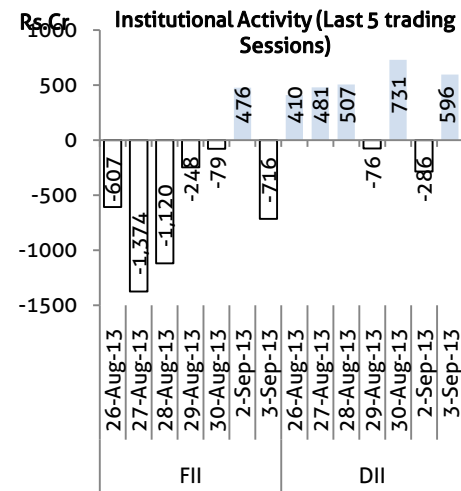
❖ The Commerce and industry ministry has asked Reserve Bank of India (RBI) to expedite the process of bringing exports under priority sector lending for both Indian as well as foreign banks. The demand has come at a time when exports registered a double digit growth in July after two straight months of contraction. (BS)

❖ Internationally renowned economist Raghuram Rajan will take over as RBI Governor on September 5 and plunge straight into a fire-fight situation as the country battles a rapid fall in rupee, high inflation, low growth and burgeoning current account deficit (CAD). (BS)

❖ The government has approved 17 foreign direct investment (FDI) proposals totalling Rs 992.61 crore, while recommending the Rs 2,058 crore Jet-Etihad deal for final clearance to the Cabinet. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3169	(0.0001)	(0.01)
GBP-USD	1.5564	0.0006	0.04
USD-JPY	99.54	(0.03)	(0.03)

Bond Markets	Closing	Chg
10-yr bond	8.67	-12.1 bps
Interbank call	10.16	-5.0 bps



Domestic News

❖ The Airports Authority of India invited request for proposals (RFQs) for operations, maintenance and development of the Chennai and Lucknow airports on a public-private partnership (PPP) basis (BS)

❖ German carmaker BMW forayed into the luxury compact segment in India with the launch of a new series priced between Rs 20.90-29.90 lakh. (BS)

❖ The government cleared the Rs 5,168-crore deal of the US-based Mylan Inc for acquiring Bangalore-based pharma firm Agila Specialties, a subsidiary of Strides Arcolab. (BS)

❖ The demand for money to pay the second tranche of advance tax by September 15, 2013 may put further pressure on liquidity. (BS)

❖ The \$24 billion Flextronics, an American supply chain solutions company, has said that the Indian Government did not encourage domestic electronic component manufacturers and high imports are hurting the company, which has a manufacturing facility near Chennai (BS)

Domestic News (Cont...)

❖ Leading domestic steel makers SAIL, Essar Steel, Jindal Steel and Power and JSW Steel have raised prices by up to Rs 2,500 per tonne for this month due to sharp increase in input costs. (BS)

❖ Fast moving consumer goods companies are pulling out all the stops in their drive to improve offtake of premium products. As consumers cut back spends, companies are redrawing their strategies to keep shopper interest alive in premium and discretionary categories - segments that have borne the brunt of the slowdown (BS)

❖ Loss-making state-run telecom firm MTNL has prepared a detailed roadmap, which suggests lowering of debt burden and annual investment of Rs 500 crore among other things, to make the company profitable by 2017-18 (BS)

❖ B K Modi-promoted Spice Group is perhaps the only big corporate house among the 26 applicants for the banking licence which is not in the lending business. However, that is hardly a factor which could discourage the \$ 2 billion group which has the knack to venture into uncharted waters and turn it into a forte. (BS)

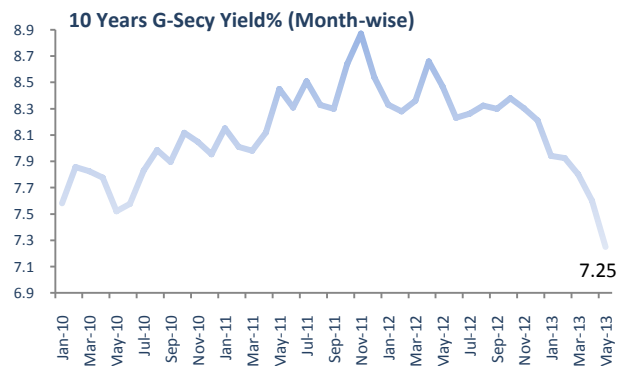
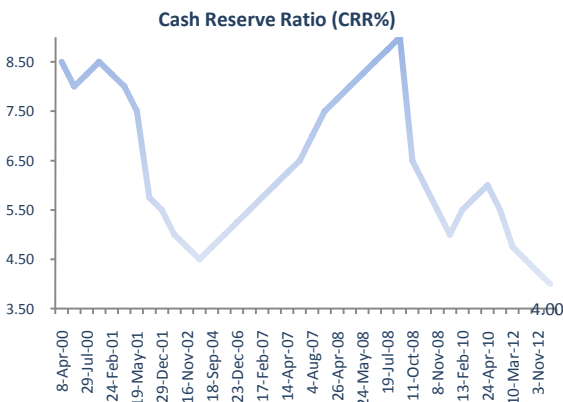
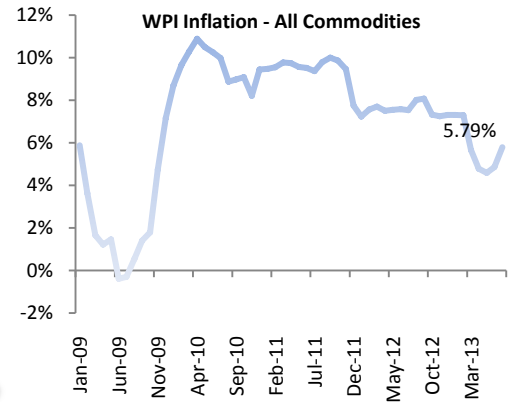
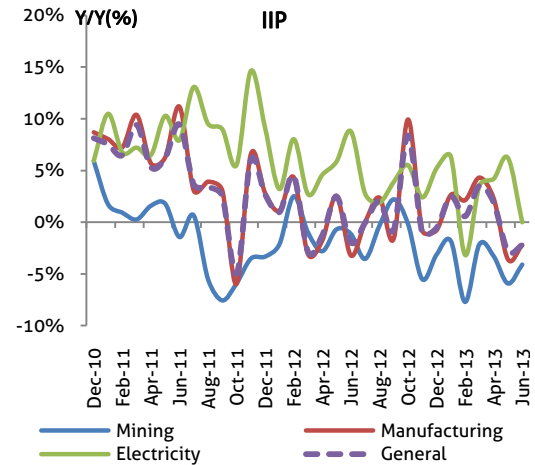
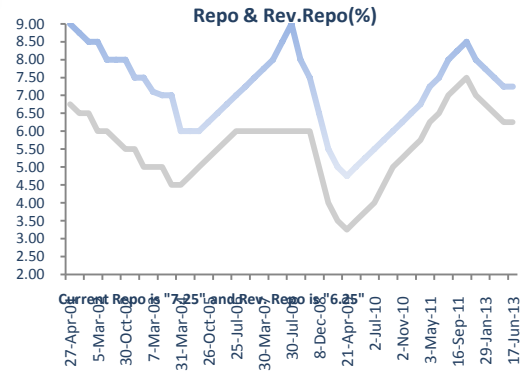
❖ Tata AIA Life Insurance introduces 5 mobile-based insurance applications (Apps). This will help them in their insurance-buying decisions. An individual can buy an insurance policy through these Apps. (BS)

❖ Hurt by subdued markets and economic slowdown, Lanco Group, which has interests in infrastructure, power and realty segments, has retrenched about 50% of its 8,000 workforce during the last 15 months its projects suffered, sources said. (BS)

❖ With an annual investment commitment of Rs 24,000 crore and involvement in 66 projects across sectors, Japanese lending agency JICA re-asserted its commitment to continue to invest in India despite economic gloom and the falling rupee that has deterred most potential investors. (BS)

❖ Housing finance company LIC Housing Finance (LICHFL) launched two new home loan schemes -- Bhagyalaxmi Plus and New Fixed 10. (BS)

❖ Country's third largest software services firm Wipro said it was planning to strengthen its presence in the Nordic region by adding 500 people over the next three years. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Sep-13	INOX Leisure Limited	GUJARAT FLUOROCHEMICALS LTD	BUY	900000	59.12
3-Sep-13	Mangalam Timber Pro Ltd	CENTURY TEXTILE & INDUSTRIES L	BUY	100000	11
3-Sep-13	INOX Leisure Limited	INOX BENEFIT TRUST	SELL	900000	59.12
3-Sep-13	Mangalam Timber Pro Ltd	SANGHAI COMMERCIAL & CREDIT (P) LTD.	SELL	97140	11

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
3-Sep-13	Jolly Plast	NITIN GUPTA	S	50,000	261
3-Sep-13	Indus Finance Corp	COMMENDAM INVESTMENTS PVT LTD	B	200,000	61.8
3-Sep-13	Jubilant Inds	JUBILANT STOCK HOLDING PRIVATE LIMITED	B	344,917	32
3-Sep-13	Olympic Cards	VASANTRAY CHUNILAL RAVANI	S	106,033	24.65
3-Sep-13	Delta Leasing	VAIBHAV JAIN	S	63,000	38.55

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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	-
533144	COX KINGS	05-Sep-13	Final Dividend - Rs.1.00	-
526703	Ecoplast-\$	05-Sep-13	Dividend - Rs.1.20	-
532219	Energy Dev	05-Sep-13	Dividend - Rs.0.80	-
532155	Gail India	05-Sep-13	Final Dividend - Rs.5.60	-
532754	GMR Infra	05-Sep-13	Dividend - Rs.0.10	-
500163	Godfrey Phil	05-Sep-13	Dividend - Rs.40.00	-
532822	Idea Cellular	05-Sep-13	Final Dividend - Rs.0.30	-
500201	India Glycols	05-Sep-13	Final Dividend - Rs.2.00	-

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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