

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 6298 | 1.23 | CNX IT | 10197 | (0.12) |
| Sensex | 21210 | 1.26 | BANK NIFTY | 10929 | 2.60 |
| DowJones | 16396 | 1.41 | S&P CNX 500 | 4873 | 1.18 |
| Nasdaq | 4352 | 1.75 | CNX FMCG | 16970 | 0.79 |
| Hangseng | 22709 | 0.23 | CNX REALTY | 155 | 1.11 |
| Shanghai | 2064 | (0.34) | CNX AUTO | 5438 | 0.62 |
| Nikkei | 14941 | 1.49 | CNX ENERGY | 7543 | 1.54 |
| Strait Times | 3111 | 0.22 | CNX PHARMA | 8081 | (0.51) |
| Kospi | 1972 | 0.90 | Advances / Declines | BSE | NSE |
| Taiwan | 8639 | 0.98 | Advances | 1602 | 939 |
| FTSE | 6824 | 1.72 | Declines | 1109 | 500 |
| CAC | 4396 | 2.45 | Unchanged | 143 | 74 |
| DAX | 9589 | 2.46 | Total | 2854 | 1513 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| HINDALCO | 114.15 | 8.10 |
| BANKBARODA | 577.60 | 5.80 |
| INDUSINDBK | 412.30 | 5.11 |
| IDFC | 99.80 | 4.89 |
| PNB | 564.80 | 4.63 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| HCLTECH | 1482.00 | (1.51) |
| JPASSOCIAT | 40.10 | (0.99) |
| SUNPHARMA | 620.15 | (0.79) |
| DRREDDY | 2802.60 | (0.46) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|------------------|-----------------|------------------|------------------|
| Media Matrix | 172.33 | 0.22 | 799 |
| Maharashtra Seam | 4.16 | 0.01 | 388 |
| Bharat Elect | 0.63 | 0.01 | 72 |
| BAJFINANCE | 1.06 | 0.02 | 46 |
| DHANLAK BANK | 21.47 | 0.69 | 31 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|---------|--------|
| USD/INR | 61.905 | 0.044 | 0.07 |
| GBP/INR | 103.257 | (0.267) | (0.26) |
| EUR/INR | 85.137 | (0.172) | (0.20) |
| JPY/INR | 60.840 | (0.170) | (0.28) |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 30450 | (225) |
| Silver (Rs/1kg) | 47303 | (501) |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 103.3 | (1.51) |
| Brent (US\$/BBL) | 109.2 | (1.89) |
| Gold (US/oz) | 1336.3 | (1.01) |
| Silver (US\$/oz) | 21.2 | (1.16) |
| Copper (US\$/MT) | 7035.0 | 0.04 |
| Alum (US\$/MT) | 1687.0 | 0.75 |
| Zinc(US\$/MT) | 2114.0 | 0.91 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 36.60 | 1.20 |
| HDFC Bank | 34.01 | 0.99 |
| Infosys | 61.87 | 1.94 |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 46.00 | 1.01 |
| Wipro | 14.13 | 0.43 |
| Tata Motors | 34.98 | 0.51 |

Market Sensor

US stocks rallied on Tuesday, with the S&P 500 closing at a record as concerns about a confrontation between Russia and Ukraine eased, and the market recovered more than all of the previous session's hefty losses. The Dow Jones industrial average jumped 227.85 points or 1.41 percent, to end at 16,395.88. The S&P 500 gained 28.18 points or 1.53 percent, to finish at 1,873.91. The Nasdaq Composite climbed 74.67 points or 1.75 percent, to close at 4,351.97.

Indian equity market managed to buck the global trend on Tuesday and scaled above with BSE Sensex settling above its crucial psychological level of 21000 effortlessly following media reports that Russian President Vladimir Putin has ordered troops to return to their bases. Nifty ended the previous trading session with a gain of 1.23% or 76.5 points at 6297.95. On Monday's trading session, FIIs bought net Rs.185.61 Cr in cash market whereas, DII sold net Rs.344.5 Cr in cash segment.

Coming to today's trade Indian markets are expected to trade in a range on Wednesday following mixed trend seen in other Asian markets. The key support for the index is around 6,155 levels.

Global News

❖ Federal Reserve policy makers backed away from their year-old commitment to consider raising interest rates when unemployment falls below 6.5 percent. (Bloomberg)

❖ Japan's trade deficit widened to a record in January as surging import costs weigh on Prime Minister Shinzo Abe's campaign to drive a sustained recovery. (Bloomberg)

❖ A Chinese manufacturing index fell to the lowest level in seven months, adding to signs of a factory slowdown that will limit growth in the world's second-largest economy. (Bloomberg)

❖ Housing starts in the U.S. slumped in January by the most in almost three years as unusually harsh winter weather added to the industry's burdens. (Bloomberg)

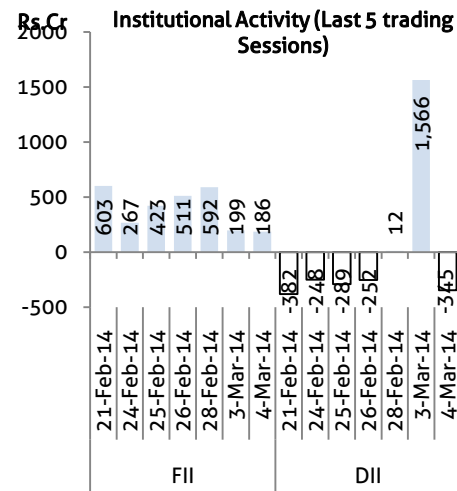
❖ Risks of prolonged market turmoil in emerging markets and of deflation in the euro area are threatening the world's improved economic prospects, according to the International Monetary Fund. (Bloomberg)

Economic News

- ❖ The subsidy for raw sugar export may come down upon review as cabinet committee has made Rs 3,333 per tonne as the ceiling for giving subsidy which will be valid only upto March 31, 2014 as per the cabinet proposal. (BS)
- ❖ In a significant development, Oil Minister M Veerappa Moily has ordered CNG retailers to provide break-up of fuel price to consumers to ensure that they passed on the benefit of cheaper domestic gas to users. (BS)
- ❖ The government appears to be willing to restart conciliation talks with UK-based Vodafone if the telecom firm makes up its mind to settle the Rs 20,000 crore tax dispute. (BS)
- ❖ The Prime Minister's Office has set up an Inter Ministerial Group (IMG) headed by the Industry Secretary to simplify the language of the policy on foreign direct investment. (BS)
- ❖ Government has issued 57.62 crore Aadhaar cards till January 31, and there is no denial of enrolment to people who don't have document-based proof of identity, Parliament was informed. (BS)
- ❖ The Delhi High Court directed the city government not to implement the 50% subsidy announced by it to people who did not pay their power bills from October 2012 to December 2013. (BS)
- ❖ The much-awaited guidelines for mergers and acquisitions of telecom companies are expected to be in place within 10 days. (BS)
- ❖ Mizoram will soon hike VAT on cigarettes in the state, official sources said. (BS)

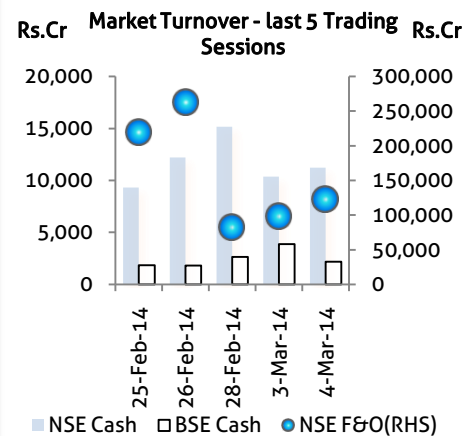
| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.3732 | (0.0011) | (0.08) |
| GBP-USD | 1.6666 | 0.0002 | 0.01 |
| USD-JPY | 102.15 | (0.06) | (0.06) |

| Bond Markets | Closing | Chg |
|----------------|---------|----------|
| 10-yr bond | 9.15 | -0.5 bps |
| Interbank call | 7.73 | -5.0 bps |



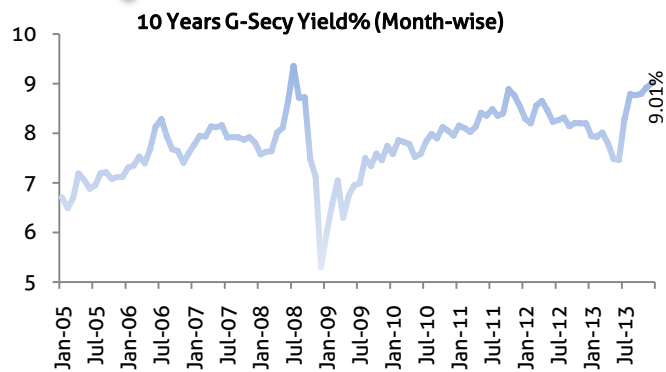
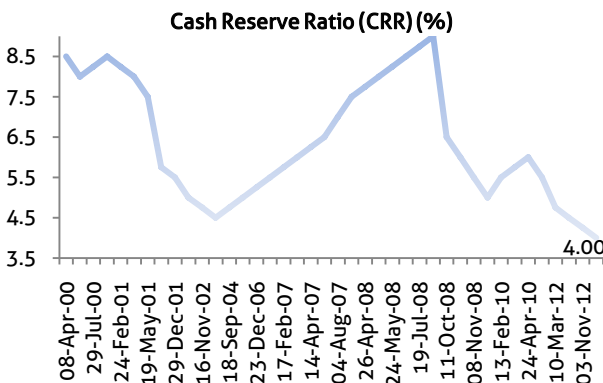
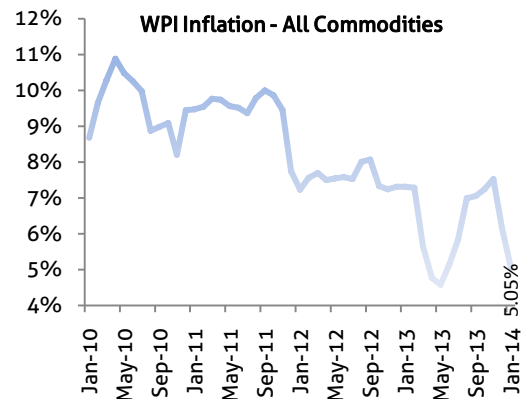
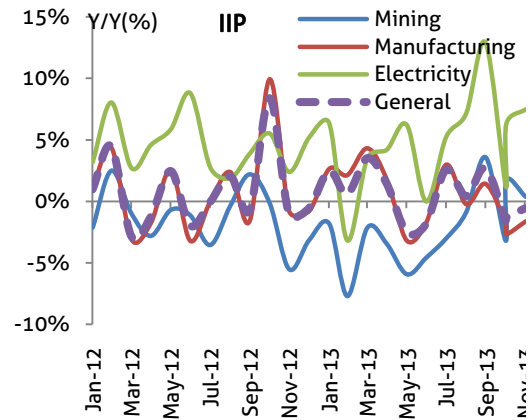
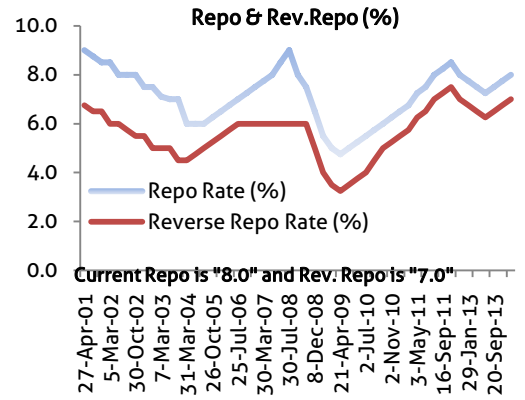
Domestic News

- ❖ Public issue of corporate bonds, including tax-free bonds, met with larger success in the current fiscal compared with previous fiscal. The key reason being the coupon rates was much attractive for the investors in a slowing inflation scenario. (BS)
- ❖ After Maruti Suzuki, Tata Motors and Nissan announced price cuts following reduction in excise duty in the interim budget, German car maker Volkswagen also announced a price reduction on the Polo, Vento and Jetta of up to Rs 51000. (BS)
- ❖ Bharti Airtel, India's biggest mobile service company has become the first in the country to cross 200 million subscribers. (BS)
- ❖ Carmaker Ford India aims to have around 200 consumer touch points, out of the total 500 planned by the middle of the decade, in smaller towns as it looks to tap growth potential in these areas going ahead. (BS)
- ❖ With its greenfield nutraceuticals plant all set to become operational later this year in Gujarat, Abbott India says it is bullish on the Indian market which is a priority market for the company globally. Having launched 40 new products in the last 24 months, the company nonetheless says it is closely monitoring the developments related to clinical trials. (BS)
- ❖ Elder Pharmaceuticals has appointed consulting firm Deloitte for restructuring the company and its brands including 'Eldervit' following the sale of its formulation business to Torrent Pharmaceuticals for Rs 2,004 crore. (BS)
- ❖ State Bank of India, the country's largest lender, may go slow on recruitments during the next 2-3 years, a top bank official said here. (BS)



Domestic News (Cont...)

- ❖ N R N Murthy, chairman Infosys took a tough stand on non-performers and said non-performance will not be tolerated. Murthy was addressing analyst at the Bank of America Meryll Lynch investor conference held in Mumbai. (BS)
- ❖ Nissan Motor India has slashed the prices of its vehicles by up to 6% from February 18 following a cut in the excise duty announced in the interim Budget. (BS)
- ❖ Companies and limited liability partnership firms floated by private entities should not use the word 'National' in their names, the government has said. (BS)
- ❖ Capital market watchdog Sebi wants listed companies to voluntarily consider separating the posts of chairman and managing director as a good governance practice because making it mandatory may not be feasible yet. (BS)
- ❖ Goldman Sachs and a unit of Mitsui & Co Ltd have led a Rs 315 crore investment in consumer goods firm Global Beverages & Foods Pvt Ltd, the investment banks said in a joint statement on Wednesday. (BS)
- ❖ In a major crackdown against listed firms not complying with regulatory disclosure norms, NSE and BSE have imposed fines or suspended trading in over 1,100 cases of non-compliance, involving nearly 600 companies. (BS)
- ❖ The New York Attorney General and the US units of Ranbaxy Laboratories and Teva Pharmaceutical Industries have settled claims that an agreement between the two drugmakers unlawfully restricted competition. (BS)
- ❖ SIDBI-backed Bandhan Financial Services Private Limited, India's largest microfinance provider in terms of loan disbursements, is planning to raise around Rs 160 crore (around \$26 million) from International Finance Corporation (IFC). (BS)
- ❖ Days after an FIR was filed against Reliance Industries and its chairman Mukesh Ambani in gas pricing case, the company's Executive Director P M S Prasad today met Delhi Lieutenant Governor Najeeb Jung. (BS)
- ❖ ICICI Bank MD and CEO Chanda Kochhar today said "growth and vibrancy" need to be brought back into the economy to make India a financial services hub. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|---------------------------|-------------------------------------|----------|-------------|--------|
| 4-Mar-14 | Garware Wall Ropes Ltd. | GARWARE WALL ROPES LIMITES | BUY | 123000 | 64.98 |
| 4-Mar-14 | IVRCL Limited | TRANSGLOBAL SECURITIES LTD. | BUY | 1853179 | 10.85 |
| 4-Mar-14 | RPG Life Sciences Limited | SWALLOW ASSOCIATES LLP | BUY | 249433 | 47.5 |
| 4-Mar-14 | Tata Elxsi Limited | CROSSEAS CAPITAL SERVICES PVT. LTD. | BUY | 181250 | 656.37 |
| 4-Mar-14 | IVRCL Limited | TRANSGLOBAL SECURITIES LTD. | SELL | 1853179 | 10.83 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|-----------------|---|----------|-------------|--------|
| 4-Mar-14 | Tata Elxsi | CROSSEAS CAPITAL SERVICES PRIVATE LIMITED | S | 168,188 | 656.83 |
| 4-Mar-14 | Media Matrix | DIGIVISION HOLDINGS PRIVATE LIMITED | B | 17,100,000 | 2.9 |
| 4-Mar-14 | Southern Petro | GANDIV INVESTMENT PVT. LTD. | B | 2,810,000 | 14.19 |
| 4-Mar-14 | Dion Global Sol | FERN HEALTHCARE PRIVATE LIMITED | S | 785,560 | 24.95 |
| 4-Mar-14 | SRS FINANCE | SUNIL JINDAL | S | 500,000 | 31.95 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|---------------------|-----------|---|-------------|
| 533304 | C. Mahendra Exports | 05-Mar-14 | Interim Dividend - Rs.0.10 | 06-Mar-14 |
| 532234 | National Alum | 05-Mar-14 | Interim Dividend - Rs.1.10 | 06-Mar-14 |
| 520113 | Vesuvius India | 06-Mar-14 | Special Dividend with Interim - Rs.1.00 | 08-Mar-14 |
| 506260 | Anuh Pharma | 07-Mar-14 | Interim Dividend - Rs.1.25 | 10-Mar-14 |
| 534711 | Cinemax India | 07-Mar-14 | Amalgamation | 10-Mar-14 |
| 590106 | BANK BEES | 10-Mar-14 | Dividend - Rs.11.00 | 11-Mar-14 |
| 590104 | JUNIOR BEES | 10-Mar-14 | Dividend - Rs.1.00 | 11-Mar-14 |
| 500126 | Merck | 10-Mar-14 | Dividend - Rs.8.50 | - |
| 590103 | NIFTY BEES | 10-Mar-14 | Dividend - Rs.7.00 | 11-Mar-14 |
| 524632 | Relish Pharma | 10-Mar-14 | Reduction of Capital | 11-Mar-14 |
| 590109 | SHARIA BEES | 10-Mar-14 | Dividend - Rs.2.00 | 11-Mar-14 |
| 500092 | CRISIL | 11-Mar-14 | Final Dividend - Rs.4.00 | - |
| 500092 | CRISIL | 11-Mar-14 | Special Dividend With Final - Rs.6.00 | - |
| 505200 | Eicher Motors | 12-Mar-14 | Dividend - Rs.30.00 | - |
| 532481 | Noida Toll | 13-Mar-14 | Interim Dividend - Rs.1.50 | 14-Mar-14 |
| 580001 | Standard Chartered | 13-Mar-14 | Final Dividend - Rs.- | 14-Mar-14 |
| 530479 | ATLINFRA | 14-Mar-14 | Stock Split from Rs.10/- to Re.1/- | 18-Mar-14 |
| 500249 | KSB Pumps | 20-Mar-14 | Final Dividend - Rs.4.50 | - |
| 500410 | ACC | 24-Mar-14 | Final Dividend - Rs.19.00 | - |
| 505790 | FAG Bearings | 27-Mar-14 | Dividend - Rs.6.00 | - |
| 500790 | Nestle India | 27-Mar-14 | Final Dividend - Rs.12.50 | - |
| 500166 | Goodricke Group | 28-Mar-14 | Dividend - Rs.4.50 | - |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|--------------------------------|--------|----------|----------|
| 03-Mar-14 | JPY | Capital Spending (YoY) | | | 1.50% |
| 03-Mar-14 | CNY | Chinese HSBC Manufacturing PMI | | | 48.3 |
| 03-Mar-14 | EUR | Manufacturing PMI | | 53 | 53 |
| 03-Mar-14 | GBP | Manufacturing PMI | | 56.5 | 56.7 |
| 03-Mar-14 | GBP | BoE Consumer Credit | | 0.70B | 0.60B |
| 03-Mar-14 | GBP | Mortgage Approvals | | 74K | 72K |
| 03-Mar-14 | USD | Core PCE Price Index (MoM) | | 0.10% | 0.10% |
| 03-Mar-14 | USD | Personal Income (MoM) | | 0.20% | |
| 03-Mar-14 | USD | Manufacturing PMI | | 56.6 | 56.7 |
| 03-Mar-14 | USD | Construction Spending (MoM) | | -0.50% | 0.10% |
| 03-Mar-14 | USD | ISM Manufacturing PMI | | 52 | 51.3 |
| 04-Mar-14 | GBP | Construction PMI | | 63 | 64.6 |
| 05-Mar-14 | CNY | Chinese HSBC Services PMI | | | 50.7 |
| 05-Mar-14 | USD | Services PMI | | | 52.7 |
| 05-Mar-14 | EUR | Services PMI | | 51.7 | 51.7 |
| 05-Mar-14 | GBP | Services PMI | | 58 | 58.3 |
| 05-Mar-14 | EUR | GDP (YoY) | | 0.50% | 0.50% |
| 05-Mar-14 | EUR | Retail Sales (MoM) | | 0.80% | -1.60% |
| 05-Mar-14 | USD | ADP Nonfarm Employment Change | | 158K | 175K |
| 05-Mar-14 | USD | ISM Non-Manufacturing PMI | | 53.5 | 54 |
| 06-Mar-14 | GBP | BoE QE Total | | | 375B |
| 06-Mar-14 | GBP | Interest Rate Decision | | 0.50% | 0.50% |
| 06-Mar-14 | EUR | Interest Rate Decision | | 0.25% | 0.25% |
| 06-Mar-14 | USD | Initial Jobless Claims | | 338K | 348K |
| 06-Mar-14 | USD | Factory Orders (MoM) | | -0.50% | -1.50% |
| 07-Mar-14 | USD | Nonfarm Payrolls | | 150K | 113K |
| 07-Mar-14 | USD | Trade Balance | | -39.00B | -38.70B |
| 07-Mar-14 | USD | Unemployment Rate | | 6.60% | 6.60% |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|-------------------------------|--------|----------|----------|
| 03-Mar-14 | INR | HSBC Markit Manufacturing PMI | | | 51.4 |
| 05-Mar-14 | INR | Indian HSBC Services PMI | | | 48.3 |
| 05-Mar-14 | INR | Indian M3 Money Supply | | | 14.30% |
| 07-Mar-14 | INR | Indian Bank Loan Growth | | | 14.80% |

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