

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5448	2.00	CNX IT	8454	2.36
Sensex	18568	1.83	BANK NIFTY	8846	2.10
DowJones	14931	0.65	S&P CNX 500	4165	1.75
Nasdaq	3649	1.01	CNX FMCG	16126	0.48
Hangseng	22558	1.04	CNX REALTY	147	(0.34)
Shanghai	2119	(0.42)	CNX AUTO	4399	2.51
Nikkei	14062	0.05	CNX ENERGY	7405	2.06
Strait Times	3044	0.95	CNX PHARMA	7046	2.54
Kospi	1952	0.96	Advances / Declines	BSE	NSE
Taiwan	8123	0.49	Advances	1364	770
FTSE	6475	0.10	Declines	927	402
CAC	3980	0.16	Unchanged	150	61
DAX	8196	0.19	Total	2441	1233

Nifty Gainers		
Company	Price(Rs)	Chg(%)
RANBAXY	444.00	8.70
BHEL	126.90	6.46
JPASSOCIAT	36.35	6.13
LUPIN	879.00	4.59
TATAMOTORS	311.00	4.59

Nifty Losers		
Company	Price(Rs)	Chg(%)
DLF	126.00	(1.02)
ITC	300.00	(0.23)
MARUTI	1275.20	(0.07)
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Market Sensor

U.S market closed higher for a second session Wednesday, with the Dow logging its biggest gain in over a month, following the Fed's upbeat Beige Book report and as the White House pressed its case for military action in Syria. Dow Jones Industrial Average was up 0.65% or 96.91 points at 14930.87. Nasdaq Composite was up 1.01% or 36.43 points at 3649.04. Standard & Poor's 500 was up 0.81% or 13.31 points at 1653.08.

Indian market bounced back after its sharp decline from its Tuesdays trading session, fall in USDINR boosted market sentiment. Nifty ended the previous trading session with a gain of 2.00% or 106.65 points at 5448.10. On Friday's trading session, FII's bought net Rs.172.53 Cr in cash market and bought net Rs 780.65 in derivative segment. Whereas, DII sold net Rs. 222.36 Cr in cash segment.

Coming to today's trade, Nifty to remain volatile with crucial intraday support placed at 5370 while resistance is seen at 5580.

Global News

❖ The trade deficit in the U.S. widened in July from an almost four-year low as Americans imported more fuel and automobiles, showing the world's largest economy is picking up. (Bloomberg)

❖ Emerging-market stocks rose, led by India, as the rupee jumped from near a record low after the central bank eased overseas borrowing rules. Persian Gulf shares sank on concern the U.S. is close to a strike against Syria. (Bloomberg)

❖ Bank of Canada Governor Stephen Poloz kept his main interest rate unchanged and reiterated that current monetary policy remains appropriate as an expected rotation of demand to exports and investment is being delayed. (Bloomberg)

❖ The euro-area economy returned to growth in the second quarter after a record-long recession, driven by a rebound in exports from the 17-nation currency bloc. (Bloomberg)

❖ Business investment in the U.S. was probably stronger last quarter than government data indicate, according to Michael Feroli, chief U.S. economist at JPMorgan Chase & Co. in New York. (Bloomberg)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Standard Chartered	7.53	0.05	144.72
Marico	9.44	0.16	58.63
Supreme Inds	3.02	0.11	27.98
Nestle India	0.31	0.02	12.75
Apollo Tyres	28.85	3.06	9.42

Indian Forex	Closing	Chg	% Chg
USD/INR	67.029	0.141	0.21
GBP/INR	104.317	0.367	0.35
EUR/INR	88.237	0.142	0.16
JPY/INR	67.180	0.000	0.00

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	32750	(450)
Silver (Rs/1kg)	54903	(1532)

Commodities	Price	% Chg.
Crude (US\$/BBL)	107.5	(0.67)
Brent (US\$/BBL)	115.1	(0.55)
Gold (US/oz)	1392.9	(1.46)
Silver (US\$/oz)	23.5	(3.37)
Copper (US\$/MT)	7125.5	(0.81)
Alum (US\$/MT)	1744.5	(1.61)
Zinc (US\$/MT)	1838.5	(1.58)

ADR	Cl. Values	% Chg.
ICICI Bank	26.95	1.46
HDFC Bank	28.59	1.00
Infosys	46.70	1.25
Sterlite Inds.	6.26	0.26
Dr. Deddy's Labs	34.00	1.55
Wipro	9.32	0.43
Tata Motors	23.50	1.19

Economic News

❖ The Reserve Bank of India on Wednesday partially relaxed some of the restrictions imposed last month on capital outflows from residents, including allowing Indian companies more leeway if they are raising funds via external commercial borrowings. (BS)

❖ In order to encourage capital flows, the RBI eased the external commercial borrowing (ECB) norms by allowing companies to use funds raised from foreign partners for general corporate purposes. (BS)

❖ Relaxing the recent curbs on the outward investments, Reserve Bank said that a company will be allowed to invest up to 400% of its net worth provided it has raised the funds through external commercial borrowings (ECBs). (BS)

❖ Rajan took over the reins of the central bank from D Subbarao at a time when there is a slump in confidence in both the economy and the currency. (BS)

❖ Reflecting lower demand despite the summer season, the price of electricity sold on country's leading power exchange IEX declined to little over Rs 2 per unit in August. (BS)

❖ The government may impose anti-dumping duty of up to \$9.03 per kg on a raw material that is imported from a few European countries and is used in manufacture of drugs, to protect domestic players. (BS)

❖ The Power Ministry will approach the Cabinet for capping the price of 27 MMSCMD gas that will be supplied to the gas-based power plants. (BS)

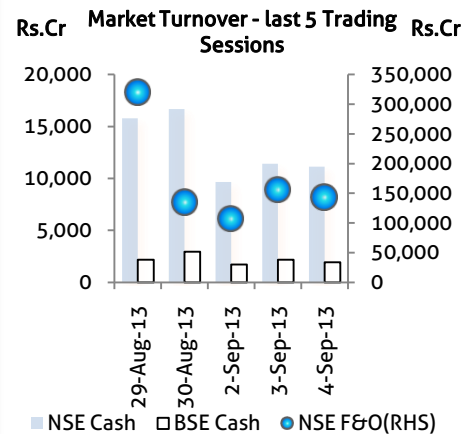
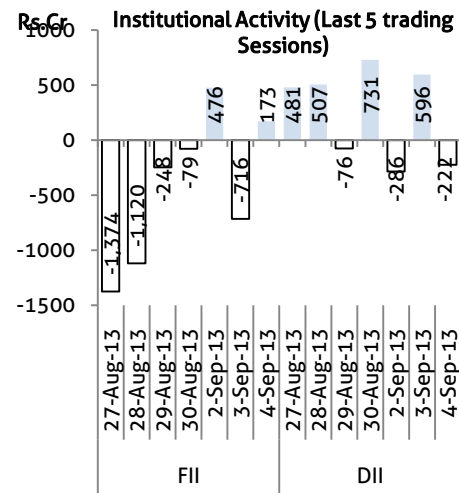
❖ The government said it has allocated Rs 8,060 crore, under Prime Minister's Employment Generation Programme (PMEGP), to set up 5 lakh projects, creating over 35 lakh jobs during the 12th Plan period (2012-17). (BS)

❖ Even as the country has been looking at the eastern countries for exports growth for past years, the exports to these countries is yet to grow as the industry has to come up with initiative to increase exports, said Asit Tripathy, joint secretary, Ministry of Commerce & Industry. (BS)

❖ The Reserve Bank of India (RBI) said it had not imposed curbs on expenses for overseas medical treatment and studies when it reduced the limit on outward remittances last month. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3193	(0.0014)	(0.11)
GBP-USD	1.5613	(0.0013)	(0.08)
USD-JPY	99.71	(0.03)	(0.03)

Bond Markets	Closing	Chg
10-yr bond	8.76	9.5 bps
Interbank call	10.04	-12.0 bps



Domestic News

❖ Jindal Steel and Power's (JSPL) moves to buy iron ore and coking coal mining assets may result in higher debt as it will also have to spend on exploration and expansion of these assets, but importantly, it will help secure key raw materials like iron ore and coal that go into steel making (.BS)

❖ State-run GSPC Gas Company (GGC), the largest city gas distributor in Gujarat, hiked prices of CNG by Rs 3 per kg, and of industrial gas by over Rs 1.90 per standard cubic metre (SCM). (BS)

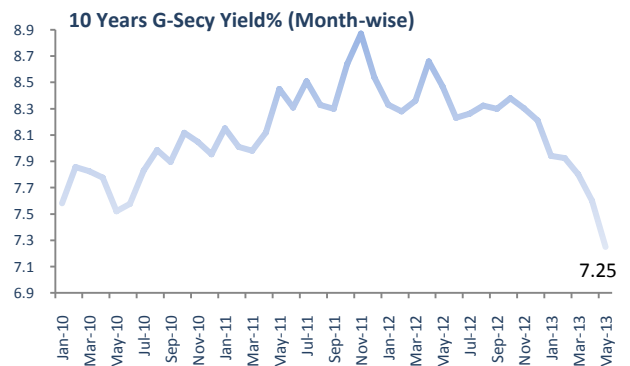
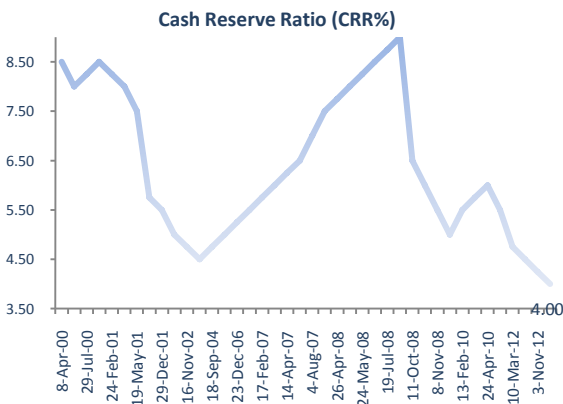
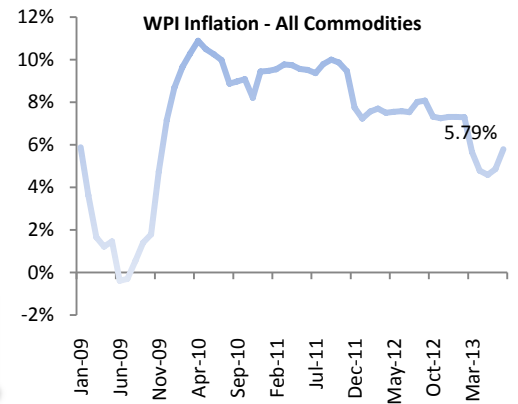
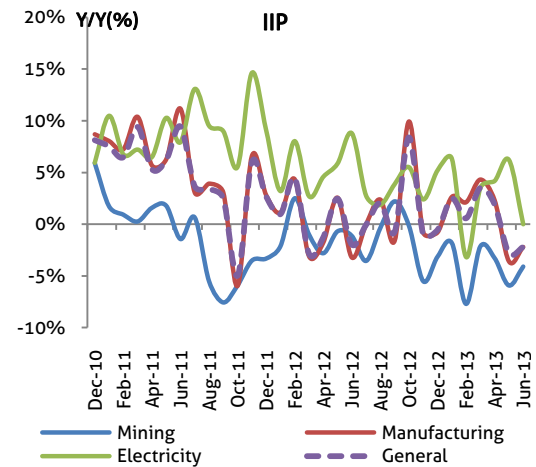
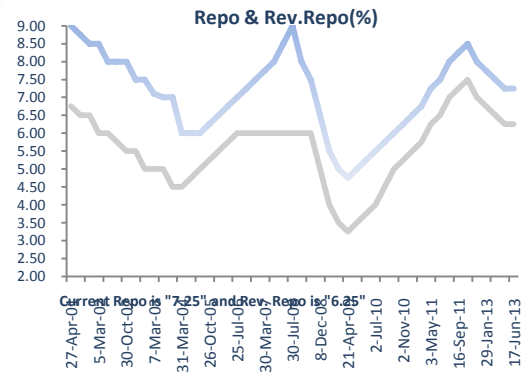
❖ IT services major TCS has bagged a multi-million dollar project from Macau's leading telecom service provider CTM for deploying rating and billing system. (BS)

❖ Foreign investor Swiss Finance Corporation (Mauritius) picked up a total of 55.30 lakh shares of Apollo Tyres for nearly Rs 36 crore through open market transactions. (BS)

❖ India Inc said it looked forward to the new RBI Governor Raghuram Rajan initiating cut in interest rates and improving credit flow to crucial sectors like infrastructure to put economy back on high-growth path. (BS)

Domestic News (Cont...)

- ❖ The Competition Commission of India (CCI) has initiated a probe into alleged collusion by oil marketing companies and ethanol manufacturers to manipulate prices during bidding process for ethanol. (BS)
- ❖ Companies promoted by Jindal brothers - JSW Steel and Jindal Steel and Power (JSPL) - will for the first time compete directly with each other as they prepare to bid for the Indian assets of UK-based Stemcor. (BS)
- ❖ Private equity firm CX Partners and global PE major Warburg Pincus are in the final race to acquire Kishore Biyani's 28.3% stake in Indian ethnic wear brand BIBA in a deal likely to be valued at Rs 300-350 crore, according to a person close to the development. (BS)
- ❖ IT firm HCL technologies said it has bagged a contract from Direct Energy, a North American energy services firm, to implement and manage residential billing and customer care operations (BS)
- ❖ State Bank of Patiala increased its base rate or minimum lending rate by 0.25 percentage points to 10.25% with immediate effect. (BS)
- ❖ Shriram City Union Finance Ltd, a part of the Rs 60,000-crore Chennai-based Shriram Group, is planning to expand its footprint in western and southern India and to make a foray into eastern and northern regions. (BS)
- ❖ Ford India said it is considering a hike in prices of its cars to offset impact of rupee depreciation. (BS)
- ❖ The investment policy cell of the Department of Telecommunications (DoT) is likely to hold a meeting on September 13 with the officials of the Kaif Investment Limited, Mauritius and Capital Global Ltd, Mauritius for a second round of talks in March to settle the ongoing disputes related to Loop Telecom. (BS)
- ❖ Reliance Industries is on track to invest \$24.4 billion in key projects by 2017 as its oil and gas business is turning around with two new gas finds while US shale gas and retail segments are growing faster, Goldman Sachs said. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
4-Sep-13	Apollo Tyres Ltd.	SWISS FINANCE CORPORATION (MAURITIUS) LIMITED	BUY	2973038	64.79
4-Sep-13	LG Balakrishnan & Bros	RAJSRIV	BUY	75000	163.04
4-Sep-13	Karuturi Global Limited	DMI FINANCE PRIVATE LIMITED	SELL	8078673	0.88
4-Sep-13	Shalimar Paints Ltd	SAL REAL ESTATES (P) LTD	SELL	123270	54.31
4-Sep-13	Hanung Toys and Textiles	GAJANAN ENTERPRISES	SELL	167890	15.53

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
4-Sep-13	Apollo Tyres	SWISS FINANCE CORPORATION (MAURITIUS) LTD	B	2,556,962	64.98
4-Sep-13	Binny Mills	V R VENKATACHALAM	B	63,950	696.35
4-Sep-13	Mahindra Forg	YOGIRAJ MAKAR	B	500,000	64.5
4-Sep-13	S V Global	VASANTHA ETHIRAJAN	B	1,076,000	23.25
4-Sep-13	Jolly Plast	SURYA MEDI TECH LIMITED	B	60,000	260.92

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
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	-
524330	Jayant Agro	05-Sep-13	Dividend - Rs.2.25	-
530813	KRBL	05-Sep-13	Final Dividend - Rs.0.80	-
509048	Lancor Hold	05-Sep-13	Dividend - Rs.2.00	-
523792	Mazda-\$	05-Sep-13	Dividend - Rs.5.00	-
513377	MMTC	05-Sep-13	Final Dividend - Rs.0.10	-
532440	MPS	05-Sep-13	Interim Dividend - Rs.5.00	06-Sep-13
532555	NTPC	05-Sep-13	Special Dividend - Rs.1.25	-
532555	NTPC	05-Sep-13	Final Dividend - Rs.0.75	-
513519	Pitti Laminations-\$	05-Sep-13	Dividend - Rs.1.00	-
532898	Power Grid Corp	05-Sep-13	Final Dividend - Rs.1.14	-
530589	Prima Plast	05-Sep-13	Dividend - Rs.1.00	-

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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