

| Equity       | Latest | % Chg  | NSE Sect. Indices          | Latest     | % Chg      |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty        | 8568   | 0.60   | CNX IT                     | 11618      | 1.77       |
| Sensex       | 28223  | 0.00   | BANK NIFTY                 | 18929      | (0.23)     |
| DowJones     | 17540  | (0.06) | S&P CNX 500                | 7186       | 0.70       |
| Nasdaq       | 5140   | 0.67   | CNX FMCG                   | 21118      | 0.94       |
| Hangseng     | 24378  | (0.56) | CNX REALTY                 | 3524       | (0.15)     |
| Shanghai     | 3669   | (0.70) | CNX AUTO                   | 8795       | 1.06       |
| Nikkei       | 20775  | 0.78   | CNX ENERGY                 | 8630       | 0.24       |
| Strait Times | 3187   | (0.15) | CNX PHARMA                 | 3869       | 0.63       |
| Kospi        | 2021   | (0.42) | <b>Advances / Declines</b> | <b>BSE</b> | <b>NSE</b> |
| Taiwan       | 8483   | (0.70) | Advances                   | 1801       | 980        |
| FTSE         | 6752   | 0.98   | Declines                   | 1157       | 528        |
| CAC          | 5197   | 1.65   | Unchanged                  | 106        | 51         |
| DAX          | 11636  | 1.57   | Total                      | 3064       | 1559       |

| Nifty Gainers |           |        |
|---------------|-----------|--------|
| Company       | Price(Rs) | Chg(%) |
| INFY          | 1086.65   | 2.78   |
| ZEEL          | 413.60    | 2.58   |
| BAJAJ-AUTO    | 2576.10   | 2.56   |
| WIPRO         | 574.15    | 2.55   |
| LUPIN         | 1681.00   | 2.47   |

| Nifty Losers |           |        |
|--------------|-----------|--------|
| Company      | Price(Rs) | Chg(%) |
| BANKBARODA   | 188.45    | (1.36) |
| COALINDIA    | 437.70    | (1.29) |
| YESBANK      | 831.00    | (1.27) |
| SBIN         | 284.95    | (1.26) |
| TATAMOTORS   | 376.00    | (1.25) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| JKIL          | 1.53            | 0.2              | 9                |
| HTMEDIA       | 7.46            | 0.9              | 8                |
| AIAENG        | 3.24            | 0.4              | 8                |
| 3MINDIA       | 0.11            | 0.0              | 7                |
| SCHNEIDER     | 6.26            | 1.0              | 6                |

| Indian Forex | Closing | Chg     | % Chg  |
|--------------|---------|---------|--------|
| USD/INR      | 63.816  | (0.116) | (0.18) |
| GBP/INR      | 99.151  | (0.672) | (0.67) |
| EUR/INR      | 69.310  | (0.739) | (1.06) |
| JPY/INR      | 51.290  | (0.300) | (0.58) |

| Precious Metal  | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm)  | 24569   | (137)     |
| Silver (Rs/1kg) | 33295   | (88)      |

| Commodities      | Price  | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 45.2   | (1.57) |
| Brent (US\$/BBL) | 49.7   | (1.02) |
| Gold (US/oz)     | 1084.2 | (0.10) |
| Silver (US\$/oz) | 14.6   | 0.14   |
| Copper (US\$/MT) | 5171.5 | (0.84) |
| Alum (US\$/MT)   | 1569.5 | (0.51) |
| Zinc(US\$/MT)    | 1888.0 | (1.97) |

| ADR              | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank       | 10.31      | (0.03) |
| HDFC Bank        | 63.06      | 0.12   |
| Infosys          | 17.39      | 0.45   |
| Sterlite Inds.   | 6.22       | 0.00   |
| Dr. Deddy's Labs | 67.44      | 1.67   |
| Wipro            | 12.65      | 0.42   |
| Tata Motors      | 29.26      | 0.36   |

## Market Sensor

US market closed off session highs on Wednesday as a renewed decline in oil and disappointment on Disney earnings pressured stocks, amid mixed signals on the timing of an interest rate hike. Dow Jones Industrial Average was down 0.06% or 10.22 points at 17540.47. Nasdaq Composite was up 0.67% or 34.40 points at 5139.95 Standard & Poor's 500 was up 0.31% or 6.52 points at 2099.84.

Indian equity market ended the session on a higher note following RBI Governor Raghuram Rajan's positive Comment on future rate cut and retained economy growth forecast of 7.6% for the current financial year. Nifty ended the previous day with a decline of 0.60% or 51.05 at 8567.95. On Wednesday's trading session, FII's bought Rs.447.9 Cr in cash market and bought net Rs.1301.9 in derivative segment. Whereas, DII sold net Rs.189.11 Cr in cash segment.

## Global News

- ❖ American companies added fewer jobs than expected last month, according to the latest ADP private payrolls report, dragged down by the struggling energy and nonvehicle manufacturing industries.(CNBC)
- ❖ The pace of growth in the U.S. service sector surged in July to its best level in a decade, led by sharp increases in business activity, employment and new orders, an industry report showed on Wednesday. (CNBC)
- ❖ U.S. services sector growth improved modestly in July from June, owing to a slight gain in employment and in new business, an industry report showed on Wednesday. (CNBC)
- ❖ The U.S. trade deficit widened more than expected in June as an acceleration in domestic demand in the second quarter and a strong dollar sucked in imports of food and automobiles. (CNBC)
- ❖ Turkey's GDP has tumbled from the highs of recent years to what experts call a disappointing 2.9 percent in 2014—which is higher than typical growth in developed nations like the United States, but weak for an emerging country. (CNBC)
- ❖ The Bank of England is likely to say on Thursday that its policymakers have split over interest rates, adding to expectations that the central bank is heading for its first increase in borrowing costs in nearly a decade.(Reuters)

## Economic News

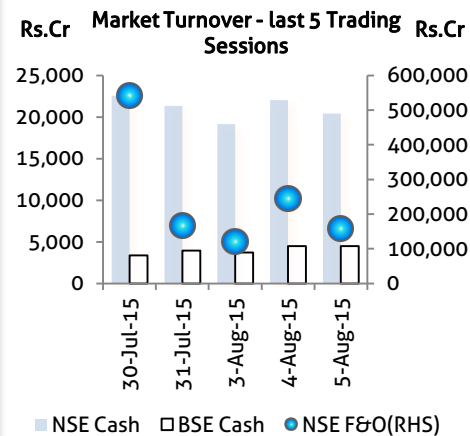
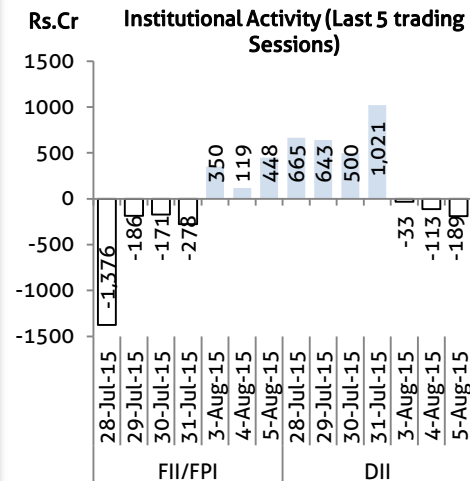
- ❖ India received \$19.78 billion foreign direct investment (FDI) from 12 countries visited by Prime Minister Narendra Modi in financial year 2014-15, Parliament was informed . (BS)
- ❖ The financial crisis in Greece has led to a 15.45 per cent fall in India's exports to the European nation during the first quarter of this fiscal, Parliament was informed . (BS)
- ❖ The government has approved building of service apartments in hotels in the national capital after a review of Master Plan Delhi-2021. (BS)
- ❖ The Reserve Bank of India (RBI) will assist Indian refiners to clear over \$6.5 billion of past dues they owe to Iran for crude oil purchases, a senior official said . (BS)
- ❖ The country's state-run banks will raise Rs 1.1 lakh crore from market in next few years to meet their funding requirements, Finance Minister Arun Jaitley told lawmakers in parliament on Wednesday. (BS)
- ❖ The government is likely to bring in rules to make it compulsory for sugar mills to export millions of tonnes of surplus supplies to support local prices, sources said, in a move that could quell growing anger among farmers but add to a glut on global markets. (BS)
- ❖ With the old and new airlines taking opposite sides on new eligibility conditions being considered for them to fly abroad, the civil aviation ministry is seeking to stay clear of any controversy a decision could stir up. (ET)
- ❖ India has decided to defer talks with the European Union on the proposed free trade agreement in protest against the ban on about 700 pharmaceutical products clinically tested by contract research organisation GVK Biosciences. (ET)

## Domestic News

- ❖ Tata Steel confirmed that negotiations about the potential sale of its European long products business and associated distribution facilities to Klesch Group have been discontinued. (BS)
- ❖ India's largest business process outsourcing firm Genpact reported a 28.2% jump in net profit at \$62.7 million for the three months ended June 2015 against the same period last year. (BS)
- ❖ Kolkata-based FMCG major Emami aims to double its revenue from overseas within next five years. The growth would come from the company's power brands and through acquisitions. (BS)
- ❖ In a bid to improve market share, the Indian subsidiary of the world's largest consumer goods company Procter & Gamble (P&G), India, has cut the price of its shampoo brands between 17% and 32%. (BS)
- ❖ New Delhi Television Limited (NDTV) reported net loss of Rs 24.3 crore during the quarter ended June 30, 2015 as compared to loss of Rs 1.5 crore in the same quarter last year. (BS)
- ❖ Tata Steel has completed the move of incorporating its Long Products Europe (LPE) division into a new standalone wholly-owned subsidiary within its European operations to create a sustainable future. (BS)
- ❖ Tata Steel, the country's oldest steel producer, will be selling its entire stake in Titan Company for Rs 352.10 per share on or after Aug 11, the latter said in an exchange notification . (BS)

| Global Forex | Closing | Chg      | % Chg  |
|--------------|---------|----------|--------|
| EUR-USD      | 1.0908  | 0.0002   | 0.02   |
| GBP-USD      | 1.5617  | 0.0014   | 0.09   |
| USD-JPY      | 124.79  | (0.0900) | (0.07) |

| Bond Markets   | Closing | Chg       |
|----------------|---------|-----------|
| 10-yr bond     | 7.98    | 3.00 bps  |
| Interbank call | 7.06    | -0.24 bps |



## Domestic News (Cont...)

❖ Broadcasting major New Delhi Television Ltd (NDTV) reported a consolidated net loss of Rs 24.29 crore for the first quarter ended June 30. (BS)

❖ Deepak Fertilisers and Petrochemicals Corporation Limited (DFPCL) announced 14% jump for the first quarter (Q1) of 2015-16. (BS)

❖ Ramco Cements Ltd has posted a net profit of Rs 97.4 crore for the quarter ended June 30, 2015 as compared to Rs 36.26 crore for the quarter ended June 30, 2014. (BS)

❖ EIH, which owns and manages the Oberoi and Tridenthotels, will increasingly focus on managing properties rather than owning them. (BS)

❖ E-marketplace major Snapdeal will spend USD 100 million (Rs 640 crore) in the next three years on research and development as it looks to bring solutions to enrich online shopping experience as the competition hots up in the booming e-commerce industry in India. (BS)

❖ Sonata Software posted Rs 38.20 crore net profit in the April-June period, up 19 per cent from Rs 32 crore made in the year ago period backed by strong domestic business. Sequentially, the profits were up by 10 per cent. (BS)

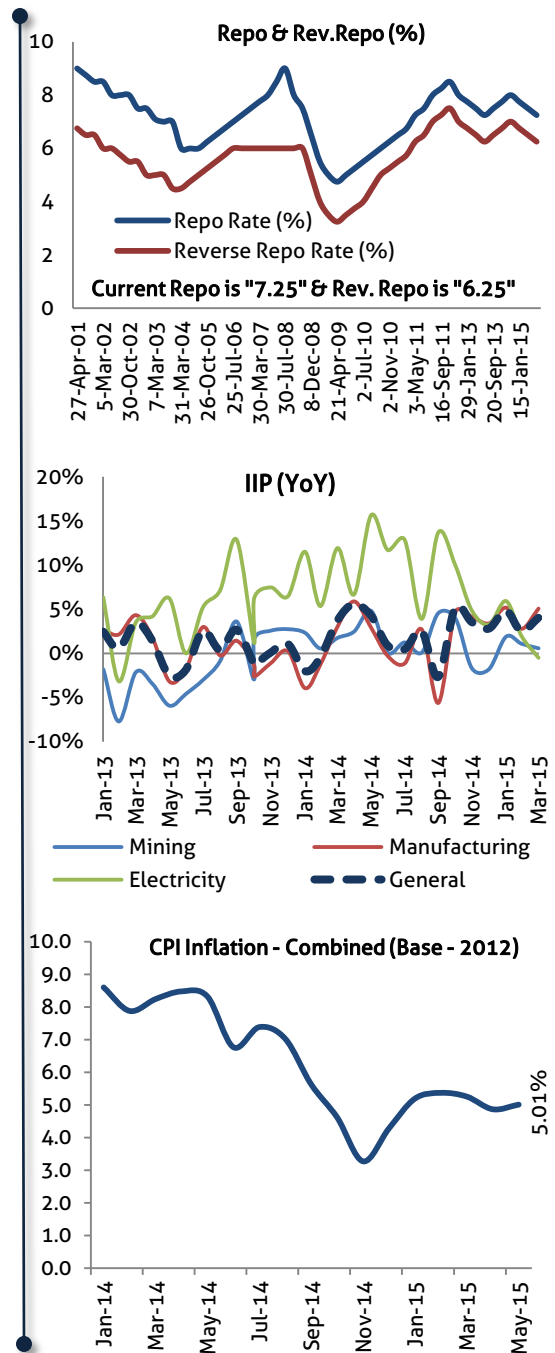
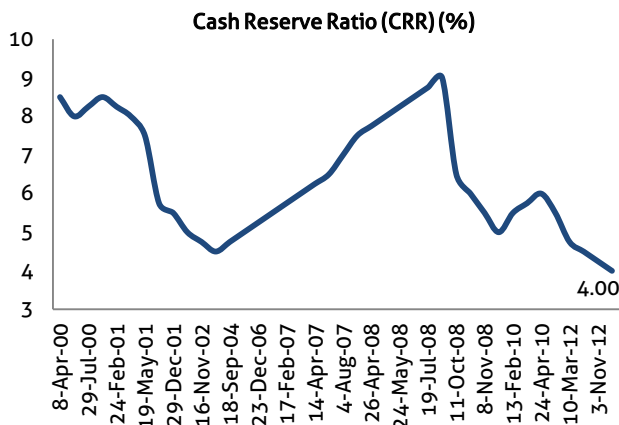
❖ The automation and solutions provider Siemens' net rose 13 fold to Rs 168.26 crore for the third quarter of financial year 2015 compared to Rs 13 crore in Q3 2014 due to cost rationalisation process. (BS)

❖ As General Motors India's Halol plant inches towards its closure in June next year, the company has already initiated talks with the state government to clear formalities to shut down the plant. (BS)

❖ Media house Bennett Coleman & Co. Ltd. (BCCL) and fashion retailer Shoppers Stop have entered into a strategic partnership to extend the brand Femina into the consumer products space. (BS)

❖ Karvy Private Wealth, wealth management arm of Hyderabad-based Karvy Group, announced the appointment of Abhijit Bhawe as chief executive officer of the company. (BS)

❖ CBI told a special court that Essar group officials were exercising control in Loop Telecom Ltd (LTL), a "front company", to bag 2G spectrum licences in violation of a provision under the Unified Access Services Licences (UASL) guidelines. (BS)



## Bulk Deal - NSE

| Date     | Security Name              | Client Name                               | Buy/Sell | Traded Qty. | Price  |
|----------|----------------------------|---|----------|-------------|--------|
| 5-Aug-15 | Greenply Industries Ltd    | ASHISH DHAWAN                             | SELL     | 343536      | 960.3  |
| 5-Aug-15 | Unitech Ltd                | ADROIT SHARE & STOCK BROKER PVT. LTD.     | SELL     | 21894693    | 7.8    |
| 5-Aug-15 | Nilkamal Limited           | N.K. SECURITIES                           | SELL     | 97605       | 1089.2 |
| 5-Aug-15 | PBA Infrastructure Limited | INDUSTRIAL DEVELOPMENT BANK OF INDIA      | SELL     | 77427       | 15.0   |
| 5-Aug-15 | Punj Lloyd Limited         | ADROIT FINANCIAL SERVICES PRIVATE LIMITED | SELL     | 1907986     | 33.7   |

## Bulk Deal - BSE

| Date     | Security Name | Client Name                        | Buy/Sell | Traded Qty. | Price |
|----------|---------------|------------------------------------|----------|-------------|-------|
| 5-Aug-15 | SALZER        | LARSEN & TOUBRO LIMITED            | S        | 1,847,358   | 290.3 |
| 5-Aug-15 | KPIT          | PROFICIENT FINSTOCK LLP            | B        | 1,125,000   | 127.5 |
| 5-Aug-15 | VIPUL         | SUNDRM CONSULTANTS PRIVATE LIMITED | S        | 900,000     | 42.0  |
| 5-Aug-15 | SUBEX         | DEUTSCHE BANK AG                   | S        | 1,735,867   | 16.1  |
| 5-Aug-15 | VIDHIDYE      | NIKHIL VORA                        | B        | 497,114     | 47.4  |

## Corporate Actions

| Scrip Code | Scrip Name | Ex-Date   | Purpose                          | Record Date |
|------------|------------|-----------|----------------------------------|-------------|
| 532404     | 7TEC       | 06-Aug-15 | Final Dividend - Rs. - 1.0000    | -           |
| 500710     | AKZOINDIA  | 06-Aug-15 | Dividend - Rs. - 20.0000         | -           |
| 500008     | AMARAJABAT | 06-Aug-15 | Dividend - Rs. - 3.6100          | -           |
| 500870     | CASTROLIND | 06-Aug-15 | Interim Dividend - Rs. - 4.0000  | 08-Aug-15   |
| 526817     | CHEVIOT    | 06-Aug-15 | Dividend - Rs. - 17.0000         | -           |
| 509472     | CRAVATEX   | 06-Aug-15 | Dividend - Rs. - 2.0000          | -           |
| 532488     | DIVISLAB   | 06-Aug-15 | Dividend - Rs. - 20.0000         | -           |
| 505700     | ELECON     | 06-Aug-15 | Dividend - Rs. - 1.1000          | -           |
| 505255     | GMM        | 06-Aug-15 | Interim Dividend - Rs. - 0.7000  | 07-Aug-15   |
| 532835     | ICRA       | 06-Aug-15 | Dividend - Rs. - 24.0000         | -           |
| 506943     | JBCHEPHARM | 06-Aug-15 | Dividend - Rs. - 4.0000          | -           |
| 506943     | JBCHEPHARM | 06-Aug-15 | Special Dividend - Rs. - 10.0000 | -           |
| 502157     | MANGLMCEM  | 06-Aug-15 | Dividend - Rs. - 2.0000          | -           |
| 523704     | MASTEK     | 06-Aug-15 | Final Dividend - Rs. - 1.0000    | -           |
| 500290     | MRF        | 06-Aug-15 | Interim Dividend - Rs. - 3.0000  | 07-Aug-15   |
| 520043     | MUNJALSHOW | 06-Aug-15 | Dividend - Rs. - 4.0000          | -           |
| 524558     | NEULANLAB  | 06-Aug-15 | Dividend - Rs. - 1.5000          | -           |
| 512626     | ORBTEXP    | 06-Aug-15 | Final Dividend - Rs. - 2.2500    | -           |
| 504614     | SARDAEN    | 06-Aug-15 | Dividend - Rs. - 3.0000          | -           |
| 531201     | SHILCTECH  | 06-Aug-15 | Dividend - Rs. - 1.5000          | -           |
| 532375     | TIPSINDLTD | 06-Aug-15 | Final Dividend - Rs. - 1.0000    | -           |
| 505978     | TRITONV    | 06-Aug-15 | Dividend - Rs. - 12.0000         | -           |

## Global Economic Calendar

| Date      | Curr. | Event                                | Actual | Forecast | Previous |
|-----------|-------|--------------------------------------|--------|----------|----------|
| 03-Aug-15 | JPY   | Manufacturing PMI (Jul)              |        |          | 51.4     |
| 03-Aug-15 | CNY   | HSBC Manufacturing PMI (Jul)         |        |          | 48.2     |
| 03-Aug-15 | EUR   | Manufacturing PMI (Jul)              |        | 52.2     | 52.2     |
| 03-Aug-15 | GBP   | Manufacturing PMI (Jul)              |        | 51.6     | 51.4     |
| 03-Aug-15 | USD   | Core PCE Price Index (MoM) (Jun)     |        | 0.10%    | 0.10%    |
| 03-Aug-15 | USD   | Personal Spending (MoM) (Jun)        |        | 0.20%    | 0.90%    |
| 03-Aug-15 | USD   | Construction Spending (MoM) (Jun)    |        | 0.60%    | 0.80%    |
| 03-Aug-15 | USD   | ISM Manufacturing PMI (Jul)          |        | 53.5     | 53.5     |
| 04-Aug-15 | GBP   | Nationwide HPI (YoY) (Jul)           |        | 3.50%    | 3.30%    |
| 04-Aug-15 | GBP   | Construction PMI (Jul)               |        | 58.4     | 58.1     |
| 04-Aug-15 | EUR   | PPI (YoY) (Jun)                      |        | -2.20%   | -2.00%   |
| 04-Aug-15 | USD   | Factory Orders (MoM) (Jun)           |        | 1.80%    | -1.00%   |
| 05-Aug-15 | EUR   | Markit Composite PMI (Jul)           |        | 53.7     | 53.7     |
| 05-Aug-15 | USD   | MBA 30-Year Mortgage Rate            |        |          | 4.17%    |
| 05-Aug-15 | USD   | ADP Nonfarm Employment Change (Jul)  |        | 215K     | 237K     |
| 05-Aug-15 | USD   | Trade Balance (Jun)                  |        | -42.70B  | -41.90B  |
| 05-Aug-15 | USD   | Markit Composite PMI (Jul)           |        |          | 55.2     |
| 05-Aug-15 | USD   | ISM Non-Manufacturing PMI (Jul)      |        | 56.2     | 56       |
| 06-Aug-15 | GBP   | Industrial Production (YoY) (Jun)    |        | 2.20%    | 2.10%    |
| 06-Aug-15 | GBP   | Manufacturing Production (YoY) (Jun) |        | 0.50%    | 1.00%    |
| 06-Aug-15 | GBP   | BoE QE Total (Aug)                   |        |          | 375B     |
| 06-Aug-15 | GBP   | Interest Rate Decision (Aug)         |        | 0.50%    | 0.50%    |
| 06-Aug-15 | USD   | Initial Jobless Claims               |        |          | 267K     |
| 07-Aug-15 | GBP   | Trade Balance (Jun)                  |        | -9.20B   | -8.00B   |
| 07-Aug-15 | USD   | Nonfarm Payrolls (Jul)               |        | 222K     | 223K     |
| 07-Aug-15 | USD   | Unemployment Rate (Jul)              |        | 5.30%    | 5.30%    |
| 07-Aug-15 | CNY   | Trade Balance (Jul)                  |        |          | 46.54B   |

## Indian Economic Calendar

| Date      | Curr. | Event                               | Actual | Forecast | Previous |
|-----------|-------|-------------------------------------|--------|----------|----------|
| 03-Aug-15 | INR   | HSBC Markit Manufacturing PMI (Jul) |        | 51       | 51.3     |
| 04-Aug-15 | INR   | Interest Rate Decision              |        | 7.30%    | 7.25%    |
| 05-Aug-15 | INR   | HSBC Services PMI (Jul)             |        |          | 47.7     |
| 05-Aug-15 | INR   | M3 Money Supply (2wk)               |        |          | 11.30%   |
| 07-Aug-15 | INR   | Bank Loan Growth (2wk)              |        |          | 9.40%    |
| 07-Aug-15 | INR   | Deposit Growth (2wk)                |        |          | 11.70%   |

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