

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8127	(3.00)	CNX IT	10960	(2.57)
Sensex	26987	(3.07)	BANK NIFTY	18431	(3.08)
DowJones	17372	(0.74)	S&P CNX 500	6657	(2.93)
Nasdaq	4593	(1.29)	CNX FMCG	19863	(1.59)
Hangseng	23424	(0.26)	CNX REALTY	4105	(4.12)
Shanghai	3360	0.26	CNX AUTO	8248	(2.60)
Nikkei	16953	0.41	CNX ENERGY	8304	(4.02)
Strait Times	3302	0.62	CNX PHARMA	10638	(2.59)
Kospi	1887	0.23	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9085	0.40	Advances	644	212
FTSE	6367	(0.79)	Declines	2253	1341
CAC	4084	(0.68)	Unchanged	58	36
DAX	9470	(0.04)	Total	2955	1589

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HINDUNILVR	772.00	1.54
COALINDIA	380.50	0.07
-	-	-
-	-	-
-	-	-

Nifty Losers		
Company	Price(Rs)	Chg(%)
JINDALSTEL	151.40	(7.03)
ONGC	331.75	(6.06)
SSLT	208.10	(5.32)
TATASTEEL	395.40	(5.11)
HDFC	1098.00	(5.05)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
SETCO	8.50	0.2	53
GDL	5.28	0.1	37
IDEA	27.99	1.6	18
NAVINFUOR	0.82	0.1	13
DIVISLAB	0.69	0.1	12

Indian Forex	Closing	Chg	% Chg
USD/INR	63.385	(0.004)	(0.01)
GBP/INR	96.719	(0.126)	(0.13)
EUR/INR	75.796	0.129	0.17
JPY/INR	53.250	0.640	1.22

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27287	512
Silver (Rs/1kg)	37187	887

Commodities	Price	% Chg.
Crude (US\$/BBL)	48.0	(4.31)
Brent (US\$/BBL)	50.9	(4.40)
Gold (US/oz)	1216.9	1.05
Silver (US\$/oz)	16.5	1.98
Copper (US\$/MT)	6191.0	(0.40)
Alum (US\$/MT)	1772.5	(1.14)
Zinc(US\$/MT)	2170.5	0.72

ADR	Cl. Values	% Chg.
ICICI Bank	11.20	(0.68)
HDFC Bank	49.93	(1.52)
Infosys	31.28	(0.22)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	47.73	(1.17)
Wipro	11.03	(0.16)
Tata Motors	40.81	(2.26)

## Market Sensor

US market recovered a portion of their losses on Tuesday, with the S&P 500 back above 2,000 after falling below the level for the first time in nearly four weeks. Dow Jones Industrial Average was down 0.74% or 130.01 points at 17371.64. Nasdaq Composite was down 1.29% or 59.84 points at 4592.74. Standard & Poor's 500 was down 0.89% or 17.97 points at 2002.61.

Indian equity market had one of its worst day in the market, falling approx 3% in a day due to fall in crude oil prices and weak global cues. probable exit of Greece from the Euro region and Crude falling to its 5.5 year low lead the Index to plunge. Nifty ended the previous trading session with a decline of 3.00% or 251.05 points at 8127.35. On Tuesday's trading session, FII sold Rs.1570.76 Cr in cash market and sold net Rs.1283.63 in derivative segment. Whereas, DII bought net Rs.1189.65 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8040 followed by 7960 while resistance exist at 8160 and then at 8220.**

## Global News

❖ Service industries settled into a more moderate rate of growth in December, putting the U.S. economic expansion on an even keel heading into 2015. The Institute for Supply Management's non-manufacturing index fell to a six-month low of 56.2 from a November. (Bloomberg)

❖ The State Bank of Vietnam devalued the dong by weakening its reference rate for the second time since June, seeking to spur exports and sustain growth. The central bank in Hanoi weakened the reference rate 1 percent to 21,458 dong per dollar. (Bloomberg)

❖ President Barack Obama plans to nominate Allan Landon, the former chief executive officer of Bank of Hawaii Corp. (BOH), to be a Federal Reserve governor after months of pressure to select a policy maker with community banking experience. (Bloomberg)

❖ Demand for U.K. mortgages fell the most since 2008 in the fourth quarter, according to the Bank of England, as more stringent lending criteria made it harder for homebuyers to get loans. (Bloomberg)

❖ Bill Gross, the former manager of the world's largest bond fund, said prices for many assets will fall this year as record-low interest rates fail to restore sufficient economic growth. (Bloomberg)

## Economic News

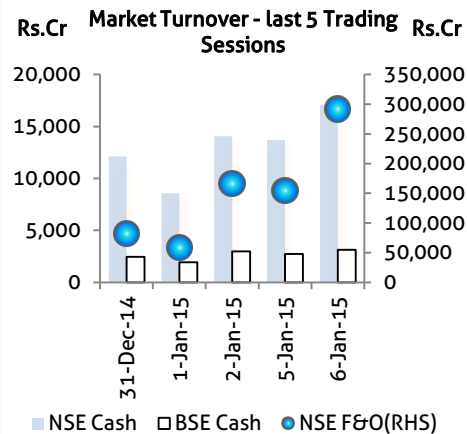
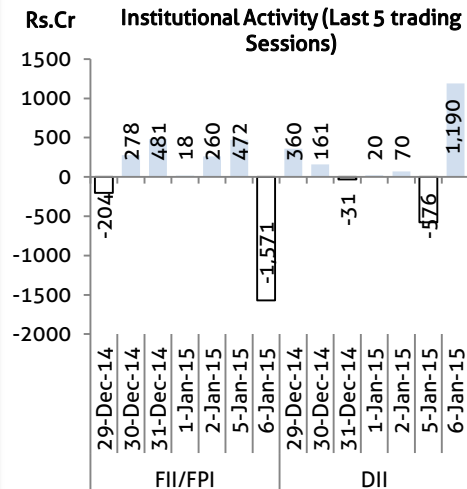
- ❖ The government decision to permit 100% foreign direct investment in medical devices will take effect from January 21, the Commerce and Industry Ministry said. (BS)
- ❖ The ongoing slide in the price of crude oil might force oil companies globally to lower their spending by up to 40 per cent in 2015, credit rating agency Moody's has said. Exploration and production (E&P) companies could be the first to be hit, while oilfield services (OFS) and midstream energy operators might feel the knock-on effects of reduced capital spending in the E&P sector. (BS)
- ❖ The Reserve Bank will cut interest rates by 0.25% in February and the year will likely see lower interest rates, says a Bank of America Merrill Lynch report. (BS)
- ❖ Parliament is likely to give its nod to the new Motor Vehicles Bill in the next session and the new legislation will transform the sector, making it transparent and corruption-free, Road Transport and Highways Minister Nitin Gadkari said. (BS)
- ❖ Reforms in the power distribution sector may have to wait as amendments to the Electricity Act cannot be presented pending the report of the Standing Committee. (BS)
- ❖ The five-day strike announced by the Coal India union is likely to have a cascading effect on the country's power sector. Northern and eastern parts of India could face power outages, as generating stations supplying power to these areas would face a shortage of coal. (BS)
- ❖ Indian steel mills set a new record by importing an all-time high of over 8 million tonne of key steel-making raw material in the 2014 calendar year. (BS)
- ❖ Unlike its manufacturing counterpart, which showed robust growth in December, the services sector ended the year 2014 on a weak note. Affected by subdued new orders, the services sector, a dominant one in India's economy, in December grew at a rate slower than the previous month, showed the widely-tracked HSBC Purchasing Managers' Index (PMI). (BS)
- ❖ Days after announcing the appointment of managing director & chief executives at four public-sector banks – Union Bank, Indian Overseas Bank, Oriental Bank of Commerce and Vijaya Bank – the government has begun the ground work to make selections for Grade-A state-run banks, such as Punjab National Bank, Bank of Baroda and Canara Bank, besides IDBI Bank (likely to be shifted to this category). (BS)

## Domestic News

- ❖ Hyderabad-based Aurobindo Pharma Limited announced that the company had received final approval from the US Food and Drug Administration (USFDA) to manufacture and market Valsartan tablets. (BS)
- ❖ Maruti Suzuki India Ltd, the country's top carmaker by volume, will increase car prices by 4 percent following the government's decision to halt tax breaks to automakers beyond Dec. 31, a company executive told Reuters on Tuesday. (BS)
- ❖ The National Stock Exchange has given clearance to the Rs 182-crore merger of Gurgaon-based Satyam Cineplexes Ltd with multiplex chain Inox Leisure. (BS)
- ❖ Godrej Consumer Products on Tuesday said it had entered into an agreement with South Africa-based Frika Hair to acquire 100 per cent of its hair-extension business. It did not disclose the value of the deal. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1876	(0.0014)	(0.12)
GBP-USD	1.5140	(0.0011)	(0.07)
USD-JPY	119.10	0.71	0.60

Bond Markets	Closing	Chg
10-yr bond	7.96	2.90 bps
Interbank call	7.95	-37.96 bps



## Domestic News (Cont...)

❖ Recent developments have provided multiple reasons to cheer the Gujarat State Petronet (GSPL) scrip which made a new lifetime high of Rs 135.65 on Tuesday. (BS)

❖ Drug maker Lupin has launched generic version of Diovan tablets, a hypertension drug, in the US market after getting approval from the American health regulator. (BS)

❖ The new year has pushed the automotive industry on the back foot with prices of cars and SUVs soaring by around 5-6% with the withdrawal of the excise duty concession that was in place since June but ended in December. (BS)

❖ Apollo Hospitals' subsidiary Apollo Health and Lifestyle Ltd announced the acquisition of Nova Specialty Hospitals. (BS)

❖ Drug firm Arvind Remedies said workers of its unit at Kakkalur plant in Tamil Nadu have been on strike for the past few days affecting production. (BS)

❖ Mahindra & Mahindra Ltd has touched 50 lakh vehicle production milestone, rolling out its 5 millionth vehicle from Kandivali plant in Mumbai. (BS)

❖ Market regulator Sebi has sought clarifications from the merchant banker of Videocon D2H Ltd, the satellite television arm of Videocon Group, regarding the company's proposed Rs 700 crore initial public offer (IPO). (BS)

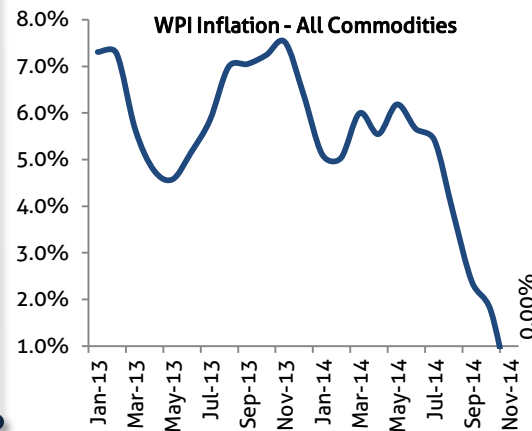
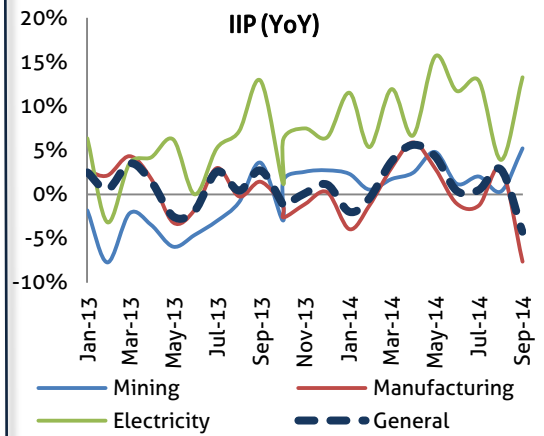
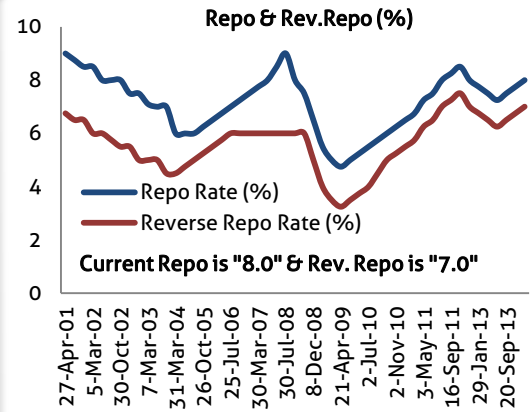
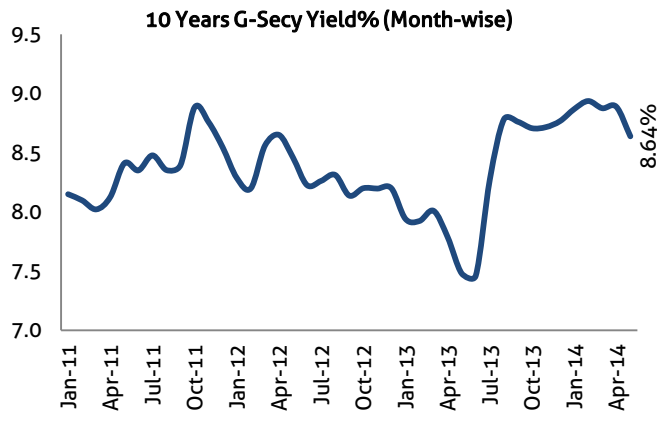
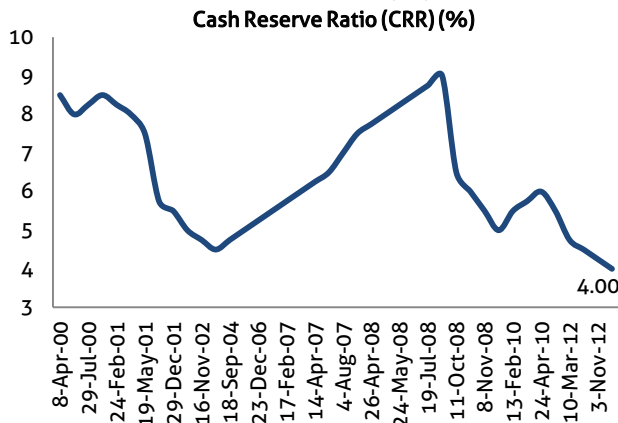
❖ Cadila Healthcare hit a 52-week high on the back of price hikes and subsequent earnings upgrades due to a strong pipeline in the US and Indian markets. (BS)

❖ Trade unions across the country began a five-day coal industry strike, which is likely to affect production of up to 1.5 million tonnes a day and fuel supply to power plants. (BS)

❖ Healthcare major Apollo Hospitals Enterprise announced its acquisition of Nova Speciality Hospitals in an upto Rs 145 crore deal as it aims to create business of Rs 500 crore in five years from short stay/day surgery centres. (BS)

❖ The third quarter results season is here with analysts expecting the BSE Sensex companies to report a flat net income growth on a year on year basis with metals and real estate companies pulling down the earnings of Corporate India. (BS)

❖ Reflecting a growing interest in startups, the Indian Angel Network (IAN) made investments worth Rs 70 crore in 2014, 75% more than the Rs 40 crore in 2013. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
6-Jan-15	Cera Sanitaryware Limited	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	70000	1839.5
6-Jan-15	OnMobile Global Limited	ONMOBILE GLOBAL LIMITED	BUY	642970	73.4
6-Jan-15	Tilaknagar Industries Ltd	WOODLAND RETAILS PRIVATE LIMITED	BUY	785000	31.1
6-Jan-15	Dr. Datson's Labs Ltd	MANAV N PATEL	BUY	750203	9.5
6-Jan-15	Pondy Oxide Ltd	REAL SECURITIES PRIVATE LTD	SELL	72012	54.8

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
6-Jan-15	SETCO	IIFL NATIONAL DEVELOPMENT AGENDA FUND	B	500,000	245.0
6-Jan-15	TRANSPEK-\$	ITF MAURITIUS	B	260,000	325.0
6-Jan-15	ADHUNIKIND	VRINDAVAN ADVISORY SERVICES LLP	B	500,000	114.5
6-Jan-15	LUMITECH	LEENA H MEHTA	S	2,391,302	2.1
6-Jan-15	SUPRDOM	CHAUHAN PARESH R	B	31,500	93.2

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
509480	BERGEPAIN	08-Jan-15	Stock Split from Rs. 2/- to Re.1/-	09-Jan-15
534839	EFPL	08-Jan-15	Stock Split from Rs.10/- to Re.1/-	09-Jan-15
532626	PONDYOXIDE	08-Jan-15	Spin Off	09-Jan-15
532626	PONDYOXIDE	08-Jan-15	Reduction of Capital	09-Jan-15
537224	H371J29DD1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537226	H371J29DF1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537223	H371J29DG1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537225	H371J29DQ1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537228	H371J29RD1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537230	H371J29RF1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537227	H371J29RG1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537229	H371J29RQ1	09-Jan-15	Redemption of Mutual Fund	12-Jan-15
537235	TFM45DA	12-Jan-15	Dividend On Mutual Fund	13-Jan-15
537235	TFM45DA	12-Jan-15	Redemption of Mutual Fund	13-Jan-15
537236	TFM45DB	12-Jan-15	Redemption of Mutual Fund	13-Jan-15
537237	TFM45DD	12-Jan-15	Redemption of Mutual Fund	13-Jan-15
533305	SRSREAL	13-Jan-15	BONUS 1:1	14-Jan-15
500550	SIEMENS	14-Jan-15	Dividend - Rs.6.00	-
537279	H369J29DD1	15-Jan-15	Redemption of Mutual Fund	16-Jan-15
537281	H369J29DF1	15-Jan-15	Redemption of Mutual Fund	16-Jan-15
537278	H369J29DG1	15-Jan-15	Redemption of Mutual Fund	16-Jan-15
537280	H369J29DQ1	15-Jan-15	Redemption of Mutual Fund	16-Jan-15

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
05-Jan-15	JPY	Manufacturing PMI (Dec)			52.1
05-Jan-15	GBP	Construction PMI (Dec)		58.9	59.4
06-Jan-15	EUR	Markit Composite PMI (Dec)		51.7	51.7
06-Jan-15	USD	Factory Orders (MoM) (Nov)		-0.20%	-0.70%
06-Jan-15	USD	ISM Non-Manufacturing PMI (Dec)		58.2	59.3
07-Jan-15	CNY	Trade Balance (Dec)			54.47B
07-Jan-15	EUR	CPI (YoY) (Dec)		-0.10%	0.30%
07-Jan-15	EUR	Unemployment Rate (Nov)		11.50%	11.50%
07-Jan-15	USD	MBA 30-Year Mortgage Rate			4.02%
07-Jan-15	USD	ADP Nonfarm Employment Change (Dec)		233K	208K
07-Jan-15	USD	Trade Balance (Nov)		-41.80B	-43.40B
08-Jan-15	EUR	PPI (MoM) (Nov)			-0.40%
08-Jan-15	GBP	BoE QE Total (Jan)			375B
08-Jan-15	GBP	Interest Rate Decision (Jan)			0.50%
08-Jan-15	USD	Continuing Jobless Claims		2,370K	2,353K
08-Jan-15	USD	Initial Jobless Claims		291K	298K
09-Jan-15	USD	Consumer Credit (Nov)		14.99B	13.23B
09-Jan-15	CNY	CPI (YoY) (Dec)			1.40%
09-Jan-15	GBP	Industrial Production (MoM) (Nov)		0.20%	-0.10%
09-Jan-15	GBP	Manufacturing Production (MoM) (Nov)		0.30%	-0.70%
09-Jan-15	GBP	Trade Balance (Nov)		-9.48B	-9.62B
09-Jan-15	USD	Manufacturing Payrolls (Dec)		15.0K	28.0K
09-Jan-15	USD	Nonfarm Payrolls (Dec)		239K	321K
09-Jan-15	USD	Private Nonfarm Payrolls (Dec)		228K	314K
09-Jan-15	USD	Unemployment Rate (Dec)		5.70%	5.80%
09-Jan-15	USD	Wholesale Inventories (MoM) (Nov)		0.30%	0.40%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
05-Jan-15	INR	HSBC Services PMI (Dec)			52.6
07-Jan-15	INR	M3 Money Supply (2wk)			
09-Jan-15	INR	Bank Loan Growth (2wk)			10.90%
09-Jan-15	INR	Deposit Growth (2wk)			10.60%

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