

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|-------|----------------------------|------------|------------|
| Nifty | 8235 | 1.64 | CNX IT | 11018 | 0.94 |
| Sensex | 27275 | 1.36 | BANK NIFTY | 18701 | 2.17 |
| DowJones | 17908 | 1.84 | S&P CNX 500 | 6755 | 1.66 |
| Nasdaq | 4736 | 1.84 | CNX FMCG | 20244 | 2.03 |
| Hangseng | 24068 | 0.98 | CNX REALTY | 4165 | 1.79 |
| Shanghai | 3299 | 0.17 | CNX AUTO | 8397 | 1.73 |
| Nikkei | 17244 | 0.45 | CNX ENERGY | 8451 | 0.54 |
| Strait Times | 3358 | 0.40 | CNX PHARMA | 10738 | 1.25 |
| Kospi | 1927 | 1.20 | Advances / Declines | BSE | NSE |
| Taiwan | 9241 | 0.04 | Advances | 2050 | 1237 |
| FTSE | 6570 | 2.34 | Declines | 823 | 295 |
| CAC | 4260 | 3.59 | Unchanged | 101 | 53 |
| DAX | 9838 | 3.36 | Total | 2974 | 1585 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| ASIANPAINT | 821.45 | 6.45 |
| DLF | 142.25 | 5.68 |
| KOTAKBANK | 1343.00 | 5.62 |
| BPCL | 680.40 | 5.50 |
| JINDALSTEL | 158.00 | 5.09 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| RELIANCE | 843.00 | (1.32) |
| ZEEL | 364.50 | (0.10) |
| - | - | - |
| - | - | - |
| - | - | - |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| TDPOWERSYS | 41.97 | 0.0 | 1189 |
| ZEELEARN | 19.94 | 0.2 | 135 |
| SRTRANSFIN | 2.67 | 0.1 | 26 |
| CAMSONBIO | 3.75 | 0.3 | 14 |
| PETRONET | 11.51 | 0.9 | 13 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|---------|--------|
| USD/INR | 62.967 | (0.483) | (0.76) |
| GBP/INR | 94.973 | (1.013) | (1.06) |
| EUR/INR | 74.427 | (0.849) | (1.13) |
| JPY/INR | 52.530 | (0.770) | (1.44) |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 26913 | (279) |
| Silver (Rs/1kg) | 37050 | (215) |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 49.1 | (0.16) |
| Brent (US\$/BBL) | 51.2 | (0.85) |
| Gold (US/oz) | 1211.4 | (0.07) |
| Silver (US\$/oz) | 16.4 | (0.67) |
| Copper (US\$/MT) | 6230.5 | 0.98 |
| Alum (US\$/MT) | 1776.5 | 0.82 |
| Zinc(US\$/MT) | 2160.0 | 0.68 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 11.59 | 0.14 |
| HDFC Bank | 52.73 | 1.06 |
| Infosys | 32.11 | 0.17 |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 49.70 | 1.57 |
| Wipro | 11.33 | 0.17 |
| Tata Motors | 44.74 | 2.41 |

Market Sensor

US market surged for a second day on Thursday, with benchmarks turning higher for the year, as oil steadied and on thinking the Federal Reserve and the European Central Bank would buttress the global economy. Dow Jones Industrial Average was up 1.84% or 323.35 points at 17907.87. Nasdaq Composite was up 1.84% or 85.72 points at 4736.19. Standard & Poor's 500 was up 1.79% or 36.24 points at 2062.14.

Indian equity market gained by a percentage in the previous trading day on account of rally in global market and recovery in oil prices. Nifty ended the previous trading session with a gain of 1.64% or 132.50 points at 8234.60. On Thursday's trading session, FII's sold Rs.466.78 Cr in cash market and bought net Rs.742.70 in derivative segment. Whereas, DII bought net Rs.288.88 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8180 followed by 8120 while resistance exist at 8280 and then at 8370 .

Global News

❖ China's factory-gate prices extended a record stretch of declines, with the sharpest drop in two years in December, suggesting room for further monetary easing. The producer-price index slumped 3.3 percent from a year earlier. (Bloomberg)

❖ Mexico central bank Governor Agustín Carstens said there's a "high probability" that policy makers will need to raise borrowing costs this year given the likelihood of tighter monetary policy in the U.S. (Bloomberg)

❖ Consumer borrowing in the U.S. increased in November as an improving economy emboldened Americans to take out school and auto loans. The \$14.1 increase in total credit followed a revised \$16 billion gain in October. (Bloomberg)

❖ House-price growth in England and Wales has returned to single-digit figures after a breakneck year for the market led by London, according to LSL Property Services and Acadata. (Bloomberg)

❖ Plummeting oil prices are taking a toll on Canada's energy exports and threatening to leave little in the economy's tank for 2015. Shipments of crude oil and bitumen dropped 9.9 percent to C\$6.9 billion (\$5.8 billion) in November. (Bloomberg)

Economic News

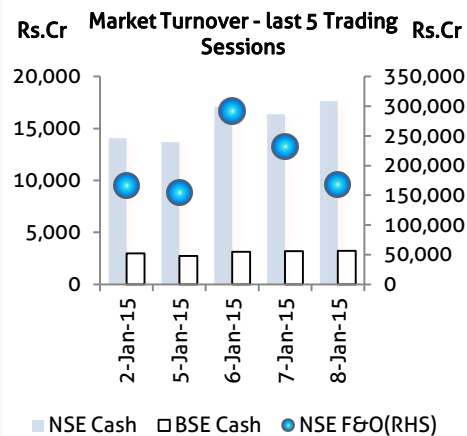
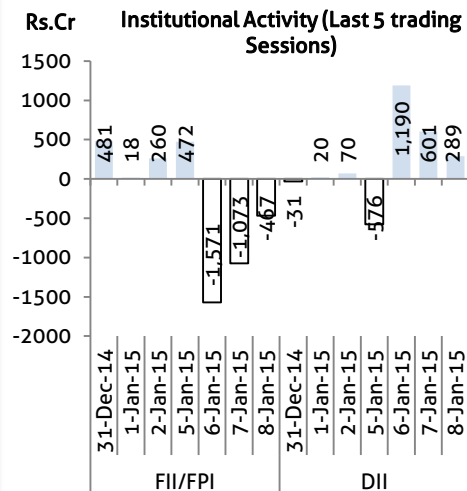
- ❖ Consumer durable firms, including Haier, Whirlpool, Panasonic, Godrej Appliances and Daikin, are increasing prices of their products by up to 5% following the withdrawal of excise duty sops, coupled with high input costs. (BS)
- ❖ The Central Information Commission (CIC) has directed the Law Ministry to disclose the Cabinet note about the decision to establish a National Judicial Appointments Commission, saying that such documents are not secret and should thus be made public. (BS)
- ❖ The Indian economy is moving on the right track with efforts to fast track reforms, raising prospects of pick up in growth from 5.4% in FY15 to 7% by fiscal year 2017, says a Macquarie report. (BS)
- ❖ The Shipping Ministry seems to be engaged in drawing up slew of suggestions to be given to the Finance Ministry ahead of union budget 2015-16 scheduled end February. (BS)
- ❖ The government has abandoned the bidding process of two ultra mega power projects (UMPPs) in Odisha and Tamil Nadu and will soon set up a committee to move it forward. (BS)
- ❖ India Inc's revenue growth in the third quarter ended December 2014 will fall to 7% (year-on-year) due to slow pace of investment, subdued growth in export-oriented sectors and soft commodity prices, according to CRISIL Research. (BS)
- ❖ Coal India (CIL) trade unions have assured the government that they will try to make up for the loss in production of about one million tonnes on account of workers strike which was called off yesterday, Coal and Power Minister Piyush Goyal said. (BS)
- ❖ The micro, small and medium enterprises (MSME) sector is set to emerge as a potent tool to exploit the demographic dividend enjoyed by India and will play a "much larger role" in the revival of the country's economy, MSME Minister Kalraj Mishra said. (BS)
- ❖ Nearly 20,000 micro and small industries in the district downed their shutters protesting against the 15% increase in the power tariff, even as the strike by powerloom job workers in Coimbatore and Tirupur districts entered the second day. (BS)
- ❖ The Ministry of Agriculture, in its report has recommended introduction of production subsidy to enhance production of certified seeds, inbred high yield varieties and hybrid seeds in the country. (BS)

Domestic News

- ❖ Castrol India (Castrol) is a key beneficiary of falling crude oil prices given that majority of its inputs such as base oil and additives are crude oil derivatives. This will rub off favorably on the company's profitability, believe analysts. (BS)
- ❖ Global rating agency Moody's has upgraded Tata Steel Ltd ("TSL")'s corporate family rating to Ba1 with a stable outlook. (BS)
- ❖ Mahindra Two Wheelers was gearing up to launch its much-delayed, production-ready motorbike, Mojo, by early next financial year, said Dharmendra Mishra, the company's vice-president (sales & customer care). (BS)
- ❖ VA Tech Wabag Limited, one of the leading Indian MNC in water and waste water treatment, recently won a Rs 220 crore JICA funded Ganga Action Plan Project in Varanasi. It may be noted, the government has informed the Supreme Court that the Ganga Project would require about Rs 51,000 crore. (BS)

| Global Forex | Closing | Chg | % Chg |
|--------------|---------|--------|--------|
| EUR-USD | 1.1807 | 0.0014 | 0.12 |
| GBP-USD | 1.5094 | 0.0004 | 0.03 |
| USD-JPY | 119.56 | (0.10) | (0.08) |

| Bond Markets | Closing | Chg |
|----------------|---------|-----------|
| 10-yr bond | 7.92 | -2.40 bps |
| Interbank call | 8.03 | 5.77 bps |



Domestic News (Cont...)

❖ Subdued demand growth last year notwithstanding, car companies are ready with their offerings to begin the new year on a fresh note, with at least three crucial launches lined up this month. (BS)

❖ The Maharashtra Food & Drug Administration (FDA) has issued an order to suspend two drug licenses of Dr Reddy's Laboratories for violations and serious lapses at its storage premises at Bhiwandi near Thane. (BS)

❖ Shareholders of Kotak Mahindra Bank gave their approval to merge Bengaluru-based ING Vvaya Bank with itself. (BS)

❖ KKR, a global investment firm, announced it has established a non-banking financial company that will provide structured credit solutions to the real estate sector in India, with an investment from Singapore sovereign wealth fund GIC. (BS)

❖ Nine years after first stepping into South Africa with the acquisition of hair colour major Rapidol, the consumer arm of the Rs 13,500-crore Godrej Group announced on Tuesday that it was buying a new firm Frika Hair. A small deal (analysts peg it at around Rs 75-80 crore or two times Frika's FY14 sales of Rs 40 crore), the latest acquisition is the fourth in South Africa by the Rs 7,583-crore Godrej Consumer (GCPL). (BS)

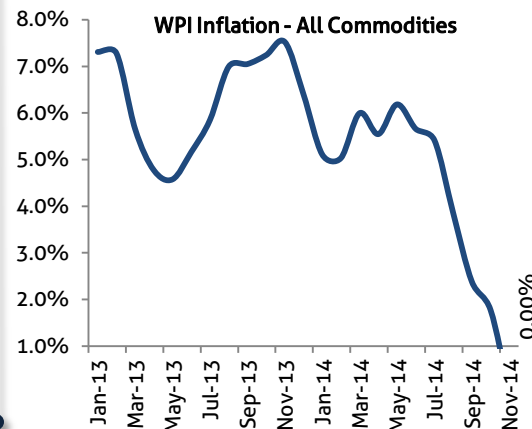
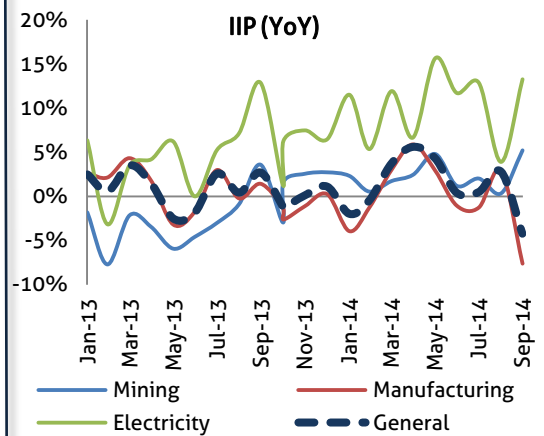
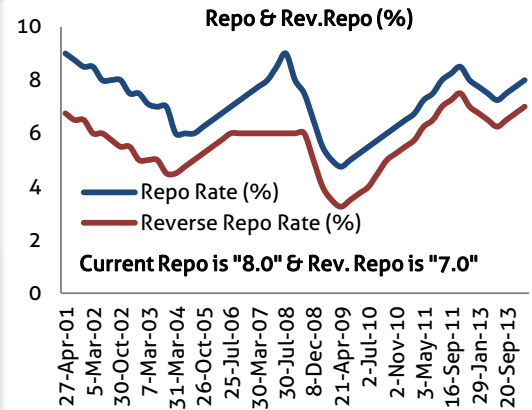
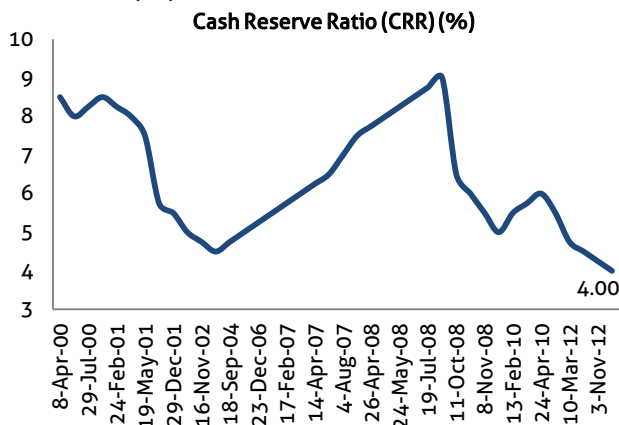
❖ Pune-based Deepak Fertilisers, which sold its 2.2% stake in Mangalore Chemicals on Monday, is low on fuel to pursue the takeover battle of Mangalore Chemicals and Fertiliser as it's facing sagging financial metrics for the last one year due to stoppage of gas supply at its plant, say analysts. (BS)

❖ SAIL, country's largest steel maker, has charted investment of Rs 1,50,000 crore till 2030-31 to ramp up steel production from 23 million tonnes to 50 million tonnes. (BS)

❖ Only 22% of Indian businesses have an operational plan for transition to new accounting norms, a new survey said. Ministry of Corporate Affairs (MCA) has announced implementation of Indian Accounting Standards (Ind AS) in a phased manner starting April 2106. (BS)

❖ Reliance Industries has finalised its 2015 diesel and jet fuel term contracts at lower premiums than last year, traders said on Thursday. (BS)

❖ Realty firm Sobha Ltd's sales bookings declined by 15 per cent to Rs 427 crore during the third quarter of this fiscal due to slowdown in demand. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|-------------------------|-------------------------|----------|-------------|--------|
| 8-Jan-15 | Bajaj Auto Limited | EUROPACIFIC GROWTH FUND | SELL | 2948801 | 2450.0 |
| 8-Jan-15 | 8K Miles Soft Serv Ltd | N.K. SECURITIES | SELL | 111542 | 811.1 |
| 8-Jan-15 | OnMobile Global Limited | ONMOBILE GLOBAL LIMITED | BUY | 617214 | 80.0 |
| 8-Jan-15 | Walchandnagar Ind. Ltd | N.K. SECURITIES | SELL | 193068 | 226.0 |
| 8-Jan-15 | Elder Pharma Ltd | VIKAS GOEL | SELL | 155000 | 144.2 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|----------|---------------|--|----------|-------------|-------|
| 8-Jan-15 | TDPOWERSYS | CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED | S | 478,204 | 420.0 |
| 8-Jan-15 | WALCHANNAG | MILLENNIUM STOCK BROKING PVT LTD | S | 254,107 | 223.2 |
| 8-Jan-15 | FCL | PARAG JAGDISHBHAI SHETH | B | 84,525 | 237.7 |
| 8-Jan-15 | RASOYPR | SUNIL CAPITAL | B | 13,733,491 | 1.0 |
| 8-Jan-15 | LINCOPH | JAYANTILAL DUNGARDAS PATEL | S | 110,100 | 83.9 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|------------|-----------|---------------------------|-------------|
| 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 |
| 537283 | H369J29RD1 | 15-Jan-15 | Redemption of Mutual Fund | 16-Jan-15 |
| 537285 | H369J29RF1 | 15-Jan-15 | Redemption of Mutual Fund | 16-Jan-15 |
| 537282 | H369J29RG1 | 15-Jan-15 | Redemption of Mutual Fund | 16-Jan-15 |
| 537284 | H369J29RQ1 | 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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