

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6,029	(0.15)	CNX IT	7,504	2.70
Sensex	20,150	0.11	BANK NIFTY	10,974	(1.91)
DowJones	15,544	(0.03)	S&P CNX 500	4,633	(0.32)
Nasdaq	3,588	(0.66)	CNX FMCG	19,101	(0.17)
Hangseng	21,362	0.08	CNX REALTY	187	(1.92)
Shanghai	1,993	(1.52)	CNX AUTO	4,537	1.66
Nikkei	14,590	(1.48)	CNX ENERGY	8,276	0.46
Strait Times	3,213	(0.15)	CNX PHARMA	7,241	(0.83)
Kospi	1,871	(0.22)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8,062	(1.62)	Advances	1009	432
FTSE	6,631	(0.06)	Declines	1331	746
CAC	3,925	(0.06)	Unchanged	147	47
DAX	8,332	(0.07)	Total	2487	1225

Nifty Gainers		
Company	Price(Rs)	Chg(%)
TCS	1743.00	4.97
BAJAJ-AUTO	1972.00	3.97
HCLTECH	888.35	3.43
GAIL	333.35	2.73
HERMOTOCO	1774.00	2.44

Nifty Losers		
Company	Price(Rs)	Chg(%)
BHEL	172.40	(9.02)
INDUSINDBK	446.50	(3.98)
AXISBANK	1190.15	(3.88)
SUNPHARMA	1077.00	(3.70)
RANBAXY	324.40	(3.60)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Eclerx Serv	0.73	0.09	7.71
MAH HOLIDAY	2.29	0.32	7.18
Bajaj Corp	3.45	0.53	6.48
Prestige Estates	6.12	1.03	5.93
Bajaj Auto	1.65	0.33	4.99

Indian Forex	Closing	Chg	% Chg
USD/INR	59.7950	0.0830	0.14
GBP/INR	91.0319	0.4428	0.49
EUR/INR	78.5222	0.3027	0.39
JPY/INR	59.7400	0.1500	0.25

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26,800	218
Silver (Rs/1kg)	40,050	50

Commodities	Price	% chg.
Crude (US\$/BBL)	108.5	0.00
Brent (US\$/BBL)	108.3	(0.58)
Gold (US/oz)	1,296.1	0.92
Silver (US\$/oz)	19.5	0.59
Copper (US\$/MT)	6,920.0	0.32
Alum (US\$/MT)	1,773.0	1.18
Zinc(US\$/MT)	1,834.0	0.45

ADR	Cl. Values	% Chg.
ICICI Bank	35.77	(1.49)
HDFC Bank	37.81	(0.18)
Infosys	47.74	0.29
Sterlite Inds.	5.69	(2.74)
Dr Reddy's Labs	39.43	(0.20)
Wipro	8.04	(0.25)
Tata Motors	24.81	1.68

## Market Sensor

U.S market finished largely unchanged in lackluster trading Friday, with the S&P 500 squeezing out a small gain to finish at another record high, but a batch of disappointing tech earnings weighed. Dow Jones Industrial Average was down 0.03% or 4.80 points at 15543.74. Nasdaq Composite was down 0.66% or 23.66 points at 3587.62. Standard & Poor's 500 was up 0.16% or 2.72 points at 1692.09.

Weak global cues prompted investors to book profit at higher levels, taking indices lower in the previous trading session. Nifty ended the previous trading session with a decline of 0.15% or 8.85 points at 6029.20. On Friday's trading session, FIIs bought net Rs.252.26 Cr in cash market and sold net Rs 605.25 Cr. in derivative segment. Whereas, DII sold net Rs.229.1 Cr in cash segment.

**Coming to today's trade, Nifty to witness volatile price action as F&O expiry is scheduled this week.**

## Global News

- ❖ Global finance chiefs sought to buttress the global economic recovery with pledges to avoid spooking markets as China moved to scrap a lending rule that had constrained its banks. (Bloomberg)
- ❖ The biggest step yet by China's new leaders to move the nation's financial system toward market-set lending rates heightens focus on what the central bank says is an even tougher reform: lifting restrictions on savers' returns. (Bloomberg)
- ❖ Japanese Prime Minister Shinzo Abe's winning of the first bicameral majority for the ruling coalition in six years sets up an internal government battle as he seeks to revamp economic to defense policies (Bloomberg)
- ❖ U.K. Prime Minister David Cameron said the U.K. economy is "healing" and that should allow the government to cut taxes (Bloomberg)
- ❖ U.S. Treasury Secretary Jacob J. Lew said a U.S. recovery is "inextricably linked" to Europe's ability to generate growth, after global finance officials urged euro-area policy makers to ease off austerity measures..(Bloomberg)

## Economic News

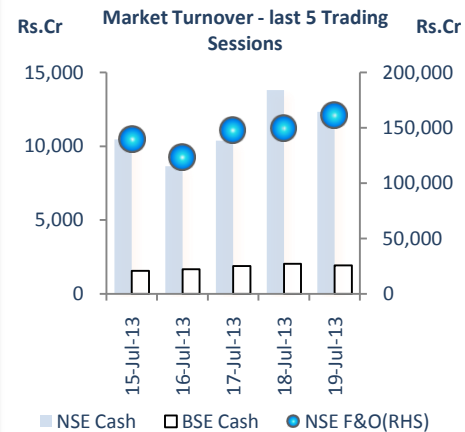
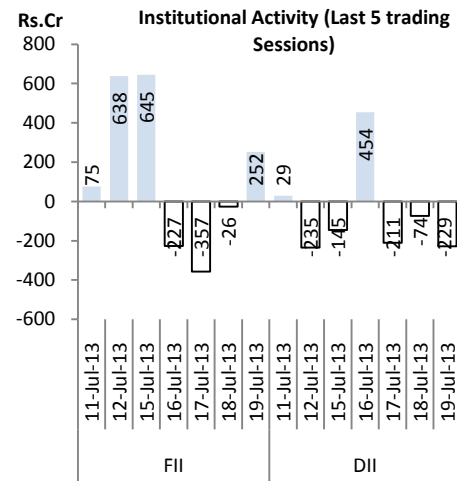
- ❖ Wary of steep rise in onion prices that could further push up food inflation, government may ban export of the commodity to improve domestic supply and keep rates under check. (BS)
- ❖ Retail inflation rose 1.5 percentage points in June for both agricultural and rural labourers compared to May, according to data issued by the ministry of labour and employment on Sunday (BS)
- ❖ Cash-strapped Railways will seek more funds from the Finance Ministry for implementing several rail projects in the country. (BS)
- ❖ Deutsche Bank cut India's economic growth forecast for the current fiscal to 5% from 6% earlier, citing disappointing set of data released last week which showed industrial production, trade, and business sentiment have deteriorated. (BS)
- ❖ The contentious issue of privatisation of electricity distribution in the urban centres of Uttar Pradesh has 'once again' come to the fore. (BS)
- ❖ Unfazed by hiccups in concluding the long-pending free trade agreement with European Union, Prime Minister Manmohan Singh expressed the hope that the pact would be sealed soon. (BS)
- ❖ The RBI's strategy to staunch the rupee's slide faced further setbacks on Friday, with investors betting a Rs 15000 crore bond auction would struggle and the currency trading where it was before this week's rescue mission was launched. (BS)
- ❖ Implementation of food security legislation will impose pressure on public finances and push up the fiscal deficit to 5% of the Gross Domestic Product in the current financial year, said a Ficci report. (BS)
- ❖ Justice P Sathasivam was sworn in as the 40th Chief Justice of India (CJ) by President Pranab Mukherjee. (BS)

## Domestic News

- ❖ For the last few quarters except March 2013 that was relatively flat, Reliance Industries has been showing a sequential improvement in its petrochemical and refining businesses, even as the exploration business continues to drag. (BS)
- ❖ The long-pending Jet-Etihad deal envisaging foreign investment of Rs 2,058 crore will come up before Foreign Investment Promotion Board (FIPB) for approval on July 29. (BS)
- ❖ Air India's financial and operational performance as part of its turnaround process came up for a review at the airline's Board meeting here. (BS)
- ❖ Drug major Sun Pharma has recalled certain lots of Nimodine capsules, a drug indicated to treat brain haemorrhage, in the US market due to crystal formation. (BS)
- ❖ The state government has refused to process the third lease renewal application of Aryan Mining and Trading Co Private Ltd, a subsidiary of UK trading major Stemcor for a 400 ha manganese ore deposit, citing its resolution passed in last October that said companies having no end-use plant would not be allowed to possess mining leases. (BS)
- ❖ Chinese handset maker, ZTE, launched six smartphones in the Indian market, under its own brand name. Until now, the company has been supplying its handsets to other manufacturers as well as operators who launched them under their own brand. (BS)
- ❖ The State-owned UCO Bank reported 41% growth in net profit at Rs 511.11 crore for the first quarter ended June 30, 2013. (BS)

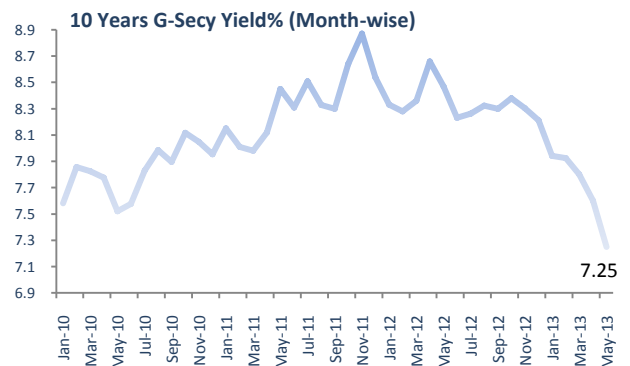
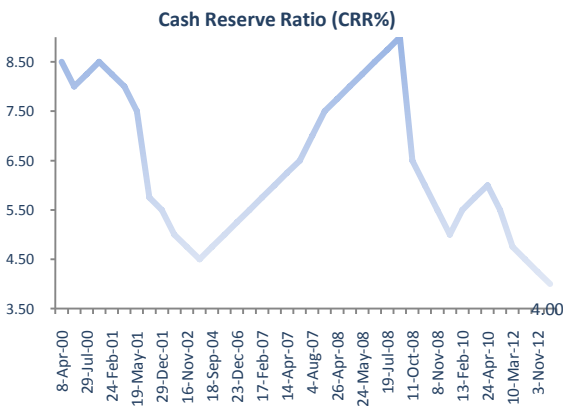
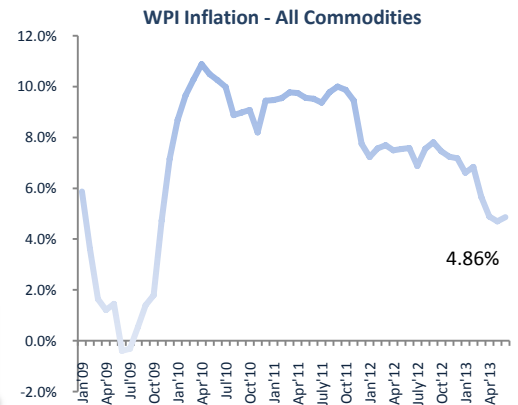
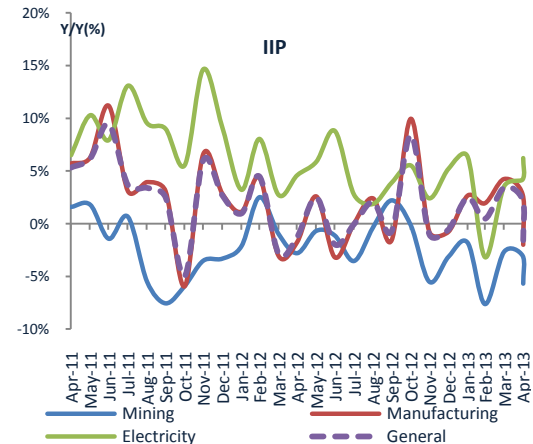
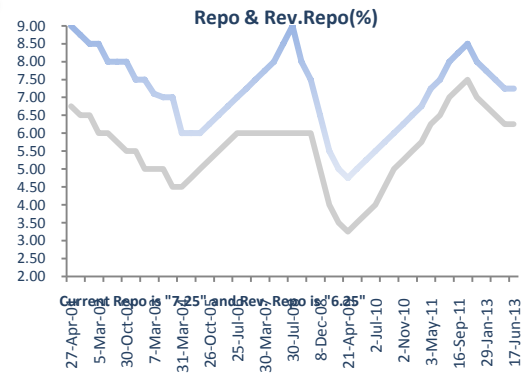
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3143	0.0034	0.26
GBP-USD	1.5267	0.004	0.26
USD-JPY	100.65	0.22	0.22

Bond Markets	Closing	Chg
10-yr bond	8.13	-2.0 bps
Interbank call	8.17	-27.0 bps



## Domestic News(Conti..)

- ❖ Driven by higher zinc and silver output, Hindustan Zinc Ltd (HZL) posted a marginal 5% increase in its net profit for the quarter ended June 30. (BS)
- ❖ IT training firm NIIT Ltd posted a consolidated net loss of Rs 9.4 crore for the first quarter ended June 30, 2013. (BS)
- ❖ CEAT has tied up with music and youth entertainment channel MTV to launch 'CEAT MTV Chase The Monsoon' - a social reality show featuring a 21 day biking roadtrip where 8 riders, in teams of 2, set out with a limited budget to explore the sights, scenes & life during Indian monsoons. (BS)
- ❖ Reliance Broadcast Network Limited (RBNL) has made three key appointments in its television business. The new entrants at the network include Anirudh Maheshwari who has been appointed as national sales head for language TV, Shweta Arora, national sales head for Big CBS and Brijesh Tanna, head of content and communications for BIG CBS channels. (BS)
- ❖ Cairn India Ltd has awarded a two-year contract for a 3-dimensional seismic survey of its prolific Rajasthan oil block to Russian firm IG Seismic Services for an undisclosed sum. (BS)
- ❖ The government has decided to slap show-cause notices on allottees of 27 captive coal mines for delaying production and seek explanations from another 21 mine holders for not developing them on time (BS)
- ❖ Vedanta group firm Hindustan Zinc reported 5% growth in net profit at Rs 1,660.45 crore for the quarter ended June 30, 2013, as impact of higher sales and output was partially offset by lower metal prices. (BS)
- ❖ Drug firm Niche Laboratories posted 8.90% rise in net profit at Rs 36.09 crore for the first quarter ended June 30, 2013. (BS)
- ❖ As mobile handsets are upgraded from the traditional ones to smart phones, usage pattern is slowly moving from voice to data. Free applications like chatting and voice chats are making consumers shift to services offering better data packages. (BS)
- ❖ The government has approved a \$1.5 billion field development plan for the Reliance Industries (RIL)-operated KG-D6 gas fields, Petroleum Minister M. Veerappa Moily said Friday.(BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Jul-13	Nucent Finance Limited	MRIDUL SECURITIES PRIVATE LIMITED	BUY	71000	16.69
19-Jul-13	Websol Energy System Ltd	RADISON TIEUP PRIVATE LIMITED	BUY	204700	5.8
19-Jul-13	Nucent Finance Limited	ANUJ KUMAR AGRAWAL	SELL	70000	16.7
19-Jul-13	Websol Energy System Ltd	PRATIK MERCHANTS PRIVATE LIMITED	SELL	205000	5.8
19-Jul-13	0	0	0	0	0

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
19-Jul-13	RADGLOBAL	AGARWAL MOHIT	S	485000	74.96
19-Jul-13	Mahindra Compo-\$	CHETAN R.SHAH	B	26555	65.25
19-Jul-13	Cupid Trades	ASHLESH GUNVANTBHAI SHAH	B	10025	157.11
19-Jul-13	Websol Energy	PRATIK MERCHANTS PRIVATE LIMITED	S	200000	5.93
19-Jul-13	Eastern Sugar	ANOOP NOPANY	B	125000	8.97

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
519105	AVT Nat Products	22-Jul-13	Final Dividend - Rs.0.75	-
500038	Balrampur Chini	22-Jul-13	Dividend - Rs.2.00	-
523229	Bharat Seats-\$	22-Jul-13	Dividend - Rs.0.80	-
532929	Brigade Enter	22-Jul-13	Dividend - Rs.1.50	-
511196	Can Fin Homes	22-Jul-13	Dividend - Rs.4.00	-
526821	Daiichi Kark-\$	22-Jul-13	Dividend - Rs.2.00	-
526821	Daiichi Kark-\$	22-Jul-13	Special Dividend - Rs.0.50	-
523369	DCM Shriram Inds-\$	22-Jul-13	Dividend - Rs.1.50	-
533282	Gravita India	22-Jul-13	Final Dividend - Rs.0.30	-
509675	HIL	22-Jul-13	Final Dividend - Rs.12.50	-
509692	Indian Card	22-Jul-13	Dividend - Rs.3.50	-
523405	JM Financial-\$	22-Jul-13	Final Dividend - Rs.0.50	-
590130	Kanco Tea	22-Jul-13	Dividend - Rs.5.00	-
519421	KSE-\$	22-Jul-13	Dividend - Rs.10.00	-
533029	ALKALI	23-Jul-13	Dividend - Rs.1.00	-
532830	Astral Poly	23-Jul-13	Final Dividend - Rs.0.75	-
532382	Balaji Tele	23-Jul-13	Dividend - Rs.0.20	-
532382	Balaji Tele	23-Jul-13	Special Dividend - Rs.0.20	-
500825	Britannia Inds	23-Jul-13	Dividend - Rs.8.50	-
506401	Deepak Nitrite-\$	23-Jul-13	Dividend - Rs.8.00	-
500840	EIH	23-Jul-13	Dividend - Rs.0.90	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
22-Jul-13	USD	Chicago Fed National Activity			-0.3
22-Jul-13	USD	Existing Home Sales		5.20M	5.18M
23-Jul-13	USD	House Price Index (YoY)			7.40%
23-Jul-13	EUR	Consumer Confidence		-18.4	-18.8
23-Jul-13	USD	Richmond Manufacturing Index			8
24-Jul-13	JPY	Trade Balance		-161B	-994B
24-Jul-13	CNY	Chinese HSBC Manufacturing PMI			48.2
24-Jul-13	EUR	Manufacturing PMI		49.1	48.8
24-Jul-13	EUR	Services PMI		48.7	48.3
24-Jul-13	USD	Manufacturing PMI		51.9	51.9
24-Jul-13	USD	New Home Sales		485K	476K
25-Jul-13	GBP	GDP (YoY)		1.30%	0.30%
25-Jul-13	USD	Core Durable Goods Orders (MoM)		0.50%	0.50%
25-Jul-13	USD	Initial Jobless Claims		339K	334K
25-Jul-13	USD	Continuing Claims			3114K
26-Jul-13	JPY	Tokyo Core CPI (YoY)		0.30%	0.20%
26-Jul-13	USD	Michigan Consumer Sentiment			83.9

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
26-Jul-13	INR	Indian Bank Loan Growth			13.70%

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