

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	7511	(0.39)	CNX IT	9700	0.01
Sensex	25106	(0.38)	BANK NIFTY	14998	(0.46)
DowJones	16947	0.15	S&P CNX 500	6039	(0.43)
Nasdaq	4368	0.20	CNX FMCG	17815	(0.10)
Hangseng	23194	0.11	CNX REALTY	3672	(1.55)
Shanghai	2027	0.15	CNX AUTO	6604	(0.82)
Nikkei	15349	(0.08)	CNX ENERGY	9859	(0.62)
Strait Times	3259	(0.31)	CNX PHARMA	8044	(0.93)
Kospi	1968	(1.20)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9274	(0.46)	Advances	1250	577
FTSE	6825	0.25	Declines	1720	960
CAC	4541	(0.48)	Unchanged	95	43
DAX	9987	(0.17)	Total	3065	1580

Nifty Gainers		
Company	Price(Rs)	Chg(%)
MCDOWELL-N	2695.00	3.61
CAIRN	371.75	1.32
AXISBANK	1865.05	1.26
KOTAKBANK	935.00	1.23
DLF	209.30	1.06

Nifty Losers		
Company	Price(Rs)	Chg(%)
M&M	1140.05	(3.07)
TATAPOWER	101.15	(2.69)
HINDALCO	163.50	(2.53)
BPCL	550.40	(2.49)
SUNPHARMA	630.00	(1.95)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Godrej Cons	5.10	0.6	9
Redington India	23.60	3.0	8
Abbott India	0.28	0.0	7
JK Cement	1.85	0.3	7
Rajesh Exports	4.78	0.8	6

Indian Forex	Closing	Chg	% Chg
USD/INR	60.279	0.275	0.46
GBP/INR	102.769	0.721	0.71
EUR/INR	82.120	0.409	0.50
JPY/INR	59.170	0.230	0.39

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	27886	386
Silver (Rs/1kg)	44245	1645

Commodities	Price	% Chg.
Crude (US\$/BBL)	106.8	0.12
Brent (US\$/BBL)	114.8	(0.09)
Gold (US/oz)	1316.6	0.29
Silver (US\$/oz)	21.0	1.45
Copper (US\$/MT)	6777.5	0.70
Alum (US\$/MT)	1845.0	0.05
Zinc(US\$/MT)	2167.0	1.33

ADR	Cl. Values	% Chg.
ICICI Bank	48.98	(0.60)
HDFC Bank	46.45	(0.67)
Infosys	54.61	(0.03)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	40.59	0.14
Wipro	11.63	(0.01)
Tata Motors	38.86	(0.61)

## Market Sensor

US market edged higher on Friday, with the Dow industrials and S&P 500 hitting records while extending gains into a sixth session, as both benchmarks tallied their fourth weekly gain in five. Dow Jones Industrial Average was up 0.15% or 25.62 points at 16947.08. Nasdaq Composite was up 0.20% or 8.71 points at 4368.04. Standard & Poor's 500 was up 0.17% or 3.39 points at 1962.87.

Indian Equity market ended on a negative note as concern of higher crude oil price and geo political tension in Iraq continues to have a negative impact on the market. Nifty ended the previous trading session with a decline of 0.39% or 29.25 points at 7511.45. On Friday's trading session, FII sold net Rs.220.65 Cr in cash market and bought net Rs.207.65 in derivative segment. Whereas, DII bought net Rs.73.85 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7490 followed by 7450 while resistance is seen at 7590 followed by 7635.**

## Global News

❖ China's economic slowdown deepened this quarter, as capital spending showed weakness and fewer companies applied for credit, a private survey showed. (Bloomberg)

❖ The U.S. economy shrank in the first quarter at the fastest pace in five years, data this week may show. U.S. durable goods probably fell in May while personal spending and home sales rose. (Bloomberg)

❖ The Philippines may offer about \$750 million in global bonds in 2015, half the overseas debt it sold this year as the nation continues to favor domestic borrowing, Treasurer Rosalia de Leon said. (Bloomberg)

❖ Colombia's central bank raised its benchmark interest rate for a third straight month as policy makers withdraw stimulus to South America's fastest-growing economy. The bank also expanded its dollar purchase program. (Bloomberg)

❖ Russia's jobless rate fell to a record in May as businesses raised salaries faster than economists predicted, helping stem a three-month slowdown in real-wage growth. Unemployment slid to 4.9 percent in May from 5.3 percent a month earlier. (Bloomberg)

## Economic News

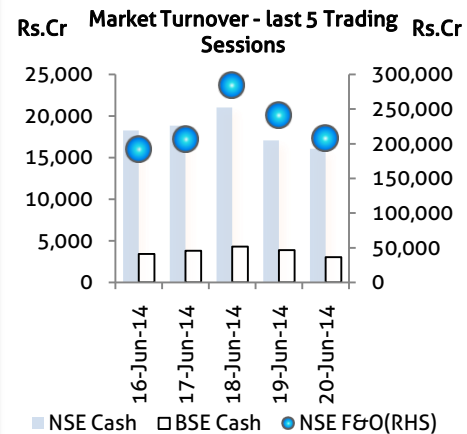
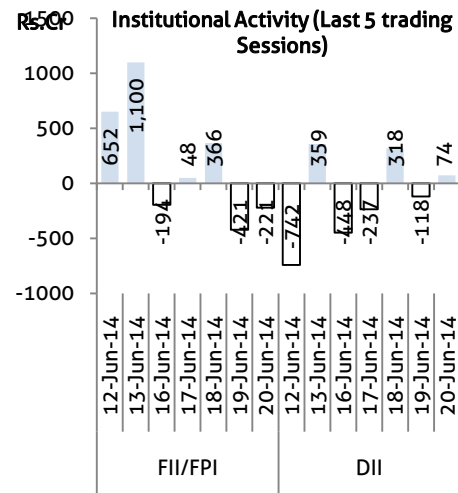
- ❖ Amid protests by major opposition parties against steep hike in rail fare and freight rates, Union Minister Nitin Gadkari said the decision was "inevitable" for the survival of the railways considering its mounting losses. (BS)
- ❖ The National Skill Development Council (NSDC) is planning to add 87 new partners it associates with and to increase the skill training three fold to 33 lakh students this year. With 31 sectors added, the Council is also expected to add new sectors including Hydrocarbons, Chemicals and Petrochemicals, Furniture and furnishing and sports into its scope, according to Dilip Chenoy, CEO and managing director of NSDC. (BS)
- ❖ Concerned over the developments in Iraq, India said volatility in petroleum prices is putting pressure on its finances at a time when emerging economies are passing through a phase of tepid economic activity. (BS)
- ❖ Sweden, which was the first country from the European Union to extend the olive branch to Narendra Modi when he was Chief Minister of Gujarat, is looking forward to the presentation of the maiden budget of the Modi led NDA government. (BS)
- ❖ As the government marks the revival of BSNL and MTNL on top of its agendas, a Credit Suisse report has said that a 'strong state-backed competitor' is not good for private sector telecom operators. (BS)
- ❖ The current account of the country would have turned surplus of 4.6% of the GDP in FY14 without energy imports, says a report. (BS)
- ❖ In a bid to restore investor confidence in electricity generation sector, Power Minister Piyush Goyal will meet bankers on Monday to discuss the financing bottlenecks affecting the industry and the way forward. (BS)
- ❖ India's urea imports have more than doubled to 14.90 lakh tonnes (LT) in the first two months of this fiscal. (BS)
- ❖ The foreign direct investment (FDI) into India has declined 26% to \$ 1.70 billion in April - the lowest in last five months, according to the data of Department of Industrial Policy and Promotion. (BS)
- ❖ Secretaries of ministries which fail to provide "critical" inputs for Cabinet proposals within the stipulated time could be made to explain the delay in doing so before the Union Cabinet. (BS)
- ❖ Food Minister Ram Vilas Paswan has called a second high-level meeting tomorrow to discuss ways to bail out the sugar industry that is unable to pay Rs 11,000 crore dues to sugarcane growers. (BS)
- ❖ The government is likely to defer implementation of the controversial GAAR provisions by one more year to April 2017 and exempt transactions made up to March 2013 in a bid to improve business sentiment. (BS)

## Domestic News

- ❖ Nearly five-and-half-years after the multi-crore accounting fraud surfaced in erstwhile Satyam Computer Services Limited, a special court set up to try the sensational case is likely to fix tomorrow the date for pronouncement of the much-awaited verdict. (BS)
- ❖ Financial Technologies is mulling appealing against electricity regulator CERC's order that directs the company to completely divest its stake in the Indian Energy Exchange (IEX). (BS)

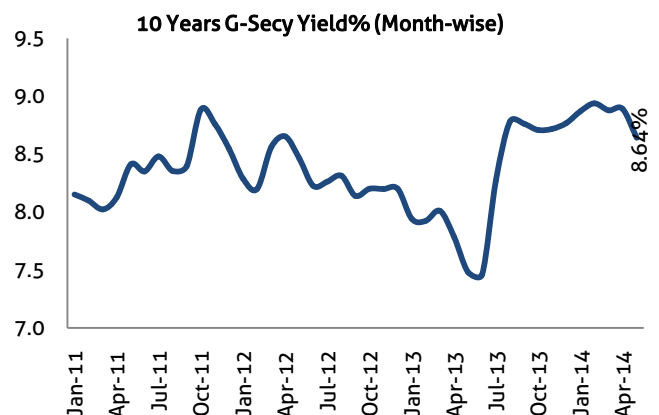
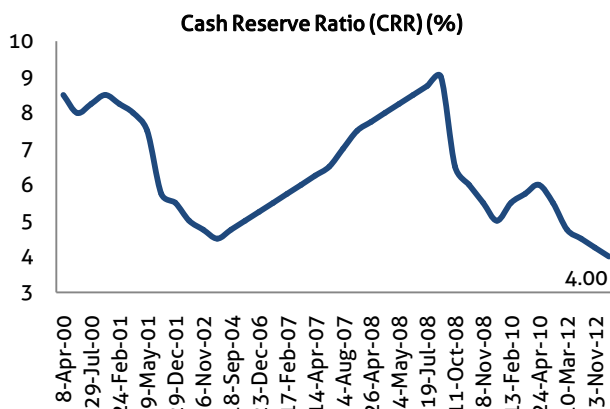
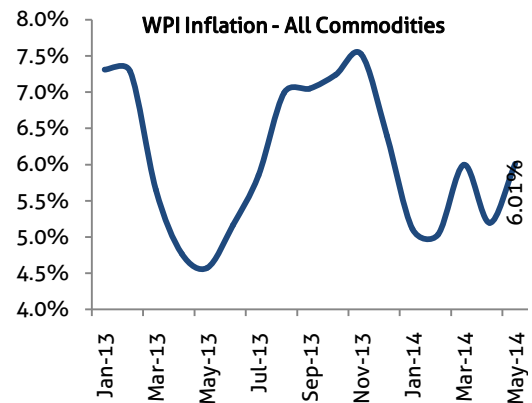
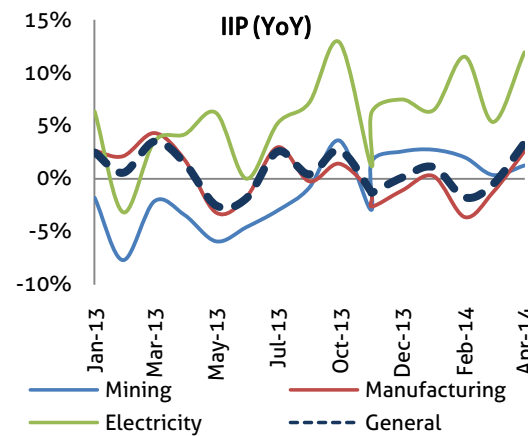
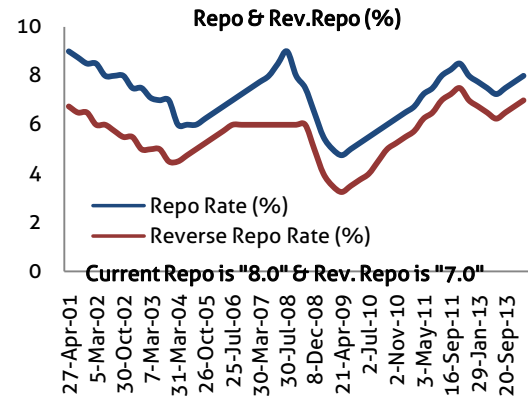
Global Forex	Closing	Chg	% Chg
EUR-USD	1.3600	(0.0008)	(0.06)
GBP-USD	1.7013	(0.0026)	(0.15)
USD-JPY	102.07	0.13	0.13

Bond Markets	Closing	Chg
10-yr bond	8.73	3.9 bps
Interbank call	7.97	2.0 bps



## Domestic News (Cont...)

- ❖ The Board of Essar Oil agreed to its promoters' proposal to delist the company from Indian bourses. (BS)
- ❖ In a major relief to Gautam and Rajesh Adani, a local court has discharged the industrialists in a case of cheating and criminal conspiracy related to purchase and sale of shares. (BS)
- ❖ Cairn India's outgoing interim CEO was paid a bonus of Rs 2.51 crore for 2013-14 but his total compensation was a third of what the firm's last full time chief executive got. (BS)
- ❖ US-based Ciena has received a tax notice from the I-T department, a claim the telecom equipment firm has contested. (BS)
- ❖ Public sector companies will soon have to follow the social welfare spending norms as prescribed under the new companies law that will replace existing guidelines in this regard. (BS)
- ❖ The Air India Board at its next meeting slated for this week is likely to take up for discussion the recommendations made by the Krishna Mohan Sahni Committee on downsizing the recognised unions at the carrier. (BS)
- ❖ With relatively easy recruitment norms, the country's IT industry is expected to see high double-digit attrition rates with most exits likely at the junior levels, says a report. (BS)
- ❖ With the June 30 deadline fast approaching for expiry of reduced excise rate, car makers want the government to extend it further even as they adopt a wait and watch policy before considering price hikes. (BS)
- ❖ Stating it has not received any information from state-owned NTPC with regard to submission of Rs 138.6 crore as bank guarantee for delays in developing mine in Jharkhand, the Coal Controller has asked the power PSU to give reasons for the same. (BS)
- ❖ Homegrown auto major Mahindra & Mahindra that has been developing a range of electric vehicles will review technology patents that American electric car maker Tesla Motors has made free for applicability to its products. (BS)
- ❖ Consumer durables major Whirlpool of India is targeting over six-fold jump in revenue from its kitchen appliances in three to four years to touch Rs 200 crore on the back of demand for its high-end products. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Jun-14	Unitech Ltd	MV SCIF MAURITIUS	BUY	17509897	33.1
20-Jun-14	Ashok Leyland Ltd.	MV SCIF MAURITIUS	SELL	13604433	32.7
20-Jun-14	Natco Pharma Limited	MV SCIF MAURITIUS	BUY	174903	1149.6
20-Jun-14	Tata Elxsi Limited	MV SCIF MAURITIUS	BUY	329350	564.7
20-Jun-14	Gokaldas Exports Limited	ICICI BANK LTD. (INVESTMENT)	BUY	1930500	83.9

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
20-Jun-14	Spicejet	MV SCIF MAURITIUS	S	2,713,429	17.8
20-Jun-14	Sharyans Res	ORANGE MAURITIUS INVESTMENTS LIMITED	B	630,000	38.5
20-Jun-14	MAHADUSHI INTERNATIONAL TRADE	NARENDER AHIRWAR	S	31,570	555.4
20-Jun-14	BLAZON MARBL	KAILASH FICOM LTD	S	501,440	20.3
20-Jun-14	Super Sales-\$	PARAMOUNT FINTRADE PVT.LTD.	S	16,500	420.2

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
526433	ASM Tech	23-Jun-14	Final Dividend - Rs.1.80	-
521220	Damodar Ind-\$	23-Jun-14	Final Dividend - Rs.1.00	-
532814	Indian Bank	23-Jun-14	Final Dividend - Rs.1.70	-
532859	Hinduja Glob	24-Jun-14	Final Dividend - Rs.10.00	-
513010	Tata Sponge	24-Jun-14	Dividend - Rs.10.00	-
509945	Thacker & Co	24-Jun-14	Stock Split from Rs.5/- to Re.1/-	25-Jun-14
532505	Uco Bank	24-Jun-14	Final Dividend - Rs.1.00	-
522275	Alstom T&D	25-Jun-14	Dividend - Rs.1.80	-
513353	Cochin Mnrl-\$	25-Jun-14	Dividend - Rs.1.00	-
523405	JM Financial-\$	25-Jun-14	Final Dividend - Rs.0.55	-
533289	Kesar Terminals	25-Jun-14	Final Dividend - Rs.1.50	-
511218	Shriram Trans	25-Jun-14	Final Dividend - Rs.4.00	-
506105	Stanrose Mafat	25-Jun-14	Dividend - Rs.6.00	-
532051	SWELECT-\$	25-Jun-14	Final Dividend - Rs.9.00	-
504387	ELF Trading	26-Jun-14	Final Dividend - Rs.2.00	-
517354	Havells India	26-Jun-14	Final Dividend - Rs.10.00	-
500116	IDBI Bank	26-Jun-14	Final Dividend - Rs.0.28	-
500304	NIIT	26-Jun-14	Dividend - Rs.1.60	-
532541	NIIT Tech	26-Jun-14	Dividend - Rs.9.00	-
531626	Orosil Smiths-\$	26-Jun-14	Stock Split from Rs.10/- to Rs.5/-	28-Jun-14
526849	Banaras Beads	27-Jun-14	Dividend - Rs.2.00	-
500096	Dabur India	27-Jun-14	Final Dividend - Rs.1.00	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
23-Jun-14	CNY	Chinese HSBC Manufacturing PMI		49.7	49.4
23-Jun-14	EUR	Manufacturing PMI		52.2	52.2
23-Jun-14	EUR	Services PMI		53.3	53.2
23-Jun-14	USD	Chicago Fed National Activity			-0.32
23-Jun-14	USD	Existing Home Sales		4.73M	4.65M
24-Jun-14	USD	House Price Index (MoM)			0.70%
24-Jun-14	USD	S&P/CS HPI Composite - 20 (YoY)		11.50%	12.40%
24-Jun-14	USD	CB Consumer Confidence		83.5	83
24-Jun-14	USD	New Home Sales		440K	433K
24-Jun-14	USD	Richmond Manufacturing Index			7
25-Jun-14	USD	MBA 30-Year Mortgage Rate			4.36%
25-Jun-14	USD	Durable Goods Orders (MoM)		0.20%	0.60%
26-Jun-14	GBP	Current Account			-22.4B
26-Jun-14	GBP	GDP (YoY)			3.10%
26-Jun-14	USD	Continuing Jobless Claims		2,570K	2,561K
26-Jun-14	USD	Core PCE Price Index (MoM)		0.20%	0.20%
26-Jun-14	USD	Initial Jobless Claims		310K	312K
26-Jun-14	USD	Personal Spending (MoM)		0.40%	-0.10%
26-Jun-14	USD	KC Fed Manufacturing			10
27-Jun-14	JPY	Household Spending (YoY)		-2.00%	-4.60%
27-Jun-14	JPY	National Core CPI (YoY)		3.40%	3.20%
27-Jun-14	JPY	Tokyo CPI (YoY)			3.10%
27-Jun-14	GBP	Current Account		-17.5B	-22.4B
27-Jun-14	GBP	GDP (YoY)		3.10%	3.10%
27-Jun-14	EUR	Consumer Confidence		-7	-7.1
27-Jun-14	EUR	Industrial Sentiment		-3	-3

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
25-Jun-14	INR	Indian M3 Money Supply			
27-Jun-14	INR	Indian Bank Loan Growth			

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