

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8551	(0.23)	CNX IT	12244	(0.96)
Sensex	28192	(0.24)	BANK NIFTY	18449	(0.85)
DowJones	18116	(0.06)	S&P CNX 500	6998	(0.44)
Nasdaq	5011	(0.31)	CNX FMCG	19999	0.00
Hangseng	24401	(0.38)	CNX REALTY	3547	(1.18)
Shanghai	3690	0.05	CNX AUTO	8598	0.14
Nikkei	19715	(0.20)	CNX ENERGY	8335	(0.24)
Strait Times	3415	0.15	CNX PHARMA	12623	0.01
Kospi	2038	0.05	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9724	(0.35)	Advances	916	413
FTSE	7038	0.22	Declines	1971	1098
CAC	5055	(0.65)	Unchanged	120	58
DAX	11896	(1.19)	Total	3007	1569

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HINDALCO	136.30	3.22
NTPC	150.00	3.09
GAIL	384.15	1.75
SSLT	190.80	1.57
M&M	1182.05	1.44

Nifty Losers		
Company	Price(Rs)	Chg(%)
JINDALSTEL	154.40	(6.17)
BHEL	237.00	(3.56)
TECHM	657.00	(3.14)
CAIRN	218.80	(2.93)
NMDC	128.05	(2.51)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
USHDI	15.59	0.0	760
NBVENTURES	4.50	0.0	160
BIRLACORPN	1.53	0.0	37
EXCELCROP	1.01	0.1	19
DILIGENT	5.09	0.4	12

Indian Forex	Closing	Chg	% Chg
USD/INR	62.288	(0.204)	(0.33)
GBP/INR	93.021	0.757	0.82
EUR/INR	67.364	0.560	0.84
JPY/INR	51.950	0.160	0.31

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26100	180
Silver (Rs/1kg)	37125	1050

Commodities	Price	% Chg.
Crude (US\$/BBL)	47.1	2.57
Brent (US\$/BBL)	55.8	2.07
Gold (US/oz)	1186.7	0.45
Silver (US\$/oz)	16.9	1.50
Copper (US\$/MT)	6093.5	2.93
Alum (US\$/MT)	1763.0	1.36
Zinc(US\$/MT)	2070.0	2.73

ADR	Cl. Values	% Chg.
ICICI Bank	10.30	(0.47)
HDFC Bank	59.67	(0.73)
Infosys	35.99	(0.12)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	55.44	(0.06)
Wipro	13.96	0.19
Tata Motors	46.72	(0.18)

## Market Sensor

US market closed lower on Monday as investors looked ahead to a light week of economic reports amid some consolidation in currency and oil prices. Dow Jones Industrial Average was down 0.06% or 11.61 points at 18116.04. Nasdaq Composite was down 0.31% or 15.45 points at 5010.97. Standard & Poor's 500 was down 0.17% or 3.68 points at 2104.42.

Indian equity market ended the session on a lower note led by the IT, consumer durables and technology stocks. March derivative expiry and 2014-15 financial close had been keeping the market volatile. Nifty ended the previous trading session with a decline of 0.23% or 20.00 points at 8550.90. On Monday's trading session, FIIs bought Rs.417.41 Cr in cash market and sold net Rs.869.08 in derivative segment. Whereas, DII bought net Rs.403.91 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8510 followed by 8460 while resistance exist at 8590 and then at 8640.**

## Global News

❖ Greek Prime Minister Alexis Tsipras and German Chancellor Angela Merkel put on a public display of mutual goodwill on Monday, appealing to Greeks and Germans to set aside recrimination and national stereotypes and work for a better European future. (Reuters)

❖ The Federal Reserve is "widely expected" to begin raising interest rates this year though the policy path remains uncertain, the central bank's second-in-command said on Monday, appearing to lay the groundwork for a less predictable future. (Reuters)

❖ China received critical support from the International Monetary Forum and Asian Development Bank on Sunday for its goal of establishing a new Chinese-led multilateral lender, adding to a growing wave of endorsements that has worried the United States. (Reuters)

❖ Leaving the EU could cost the UK economy 2.2% of total output (GDP) by 2030, a study by the think-tank Open Europe says. That would be the worst-case "Brexit" scenario, the study concludes. But GDP could rise by 1.6% if the UK negotiated a free trade deal with Europe and pursued "very ambitious deregulation". (BBC)

## Economic News

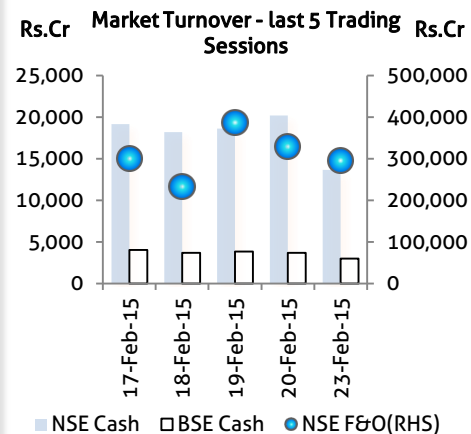
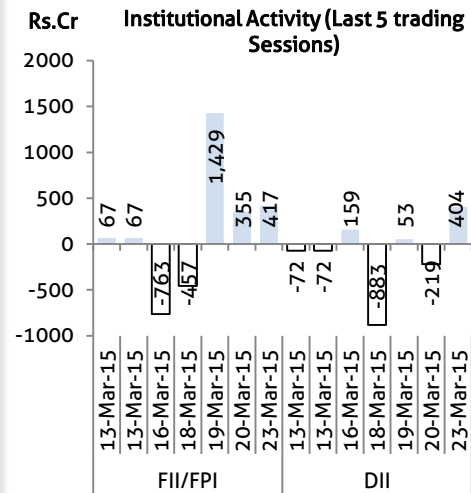
- ❖ TV channels will be barred from airing live coverage of anti-terrorist operations by security forces as per a new rule approved by the Information and Broadcasting Ministry. (BS)
- ❖ Despite a fall in the acreage in wheat, the Madhya Pradesh government has expected an increased output. (BS)
- ❖ In a first of its kind project, the Indian Railways and the Punjab government have decided to form a joint venture company to fast-track planned rail projects in the state as well as take up new projects, including creation of ultra modern railway stations and laying new railway tracks. (BS)
- ❖ The government will borrow Rs 3.6 lakh crore trillion (\$57.83 billion) in the first-half of the fiscal year that begins in April, Finance Secretary Rajeev Mehrishi said on Monday. (BS)
- ❖ At a time when the government is shifting debt management function away from the central bank, the latter said high government borrowing programme is acting as a constraint for the creation of a deeper corporate bond market. (BS)
- ❖ The development of corporate bonds has "not been too satisfactory", Reserve Bank of India Deputy Governor R Gandhi said on Monday, calling the huge supply of government bonds one of the impediments. (BS)
- ❖ Indian Railways has hiked the cost of platform tickets to Rs 10 and the new rate will come into effect from next month. (BS)
- ❖ Western Coalfields' (WCL) Penganga open cast project will benefit the people in nearby areas as ample coal will be available to Maharashtra State Power Generation Company Limited (MahaGenco) to provide electricity at cheaper rates, Chief Minister Devendra Fadnavis has said. (BS)
- ❖ A Qatar-based logistics firm has launched the first-ever direct container service between Qatar and India to further facilitate the bilateral trade that has witnessed a significant growth in the recent years. (BS)
- ❖ Commercial tax arrears on organisations falling under the Bhubaneswar range has mounted to Rs 2333.47 crore (as on February 2015). The piled up dues include Rs 1,131.19 crore of value added tax (VA), Rs 406.18 crore of central sales tax (CST), entry tax worth Rs 793.42 crore and Rs 2.68 crore of entertainment tax in four circles in the Bhubaneswar range. (BS)

## Domestic News

- ❖ Fair trade watchdog CCI has given its approval to the proposed merger of Chennai-based Shasun Pharmaceuticals with drug maker Strides Arcolab. (BS)
- ❖ Sun Pharma and Ranbaxy have got approval from the Competition Commission for sale of seven brands to Emcure Pharma to comply with the fair trade watchdog's conditional nod for their \$4-billion merger. (BS)
- ❖ Areas across the city may face long outages from Saturday as state-run Power Grid Corporation of India Ltd (PGCIL) has threatened to snap power supply to two BSES discoms if they fail to pay dues of around Rs 220 crore. (BS)
- ❖ Japanese commercial vehicles producer Isuzu is set to start manufacturing of pick-up trucks at its upcoming facility in Sri City special economic zone in Andhra Pradesh from April 2016. (BS)

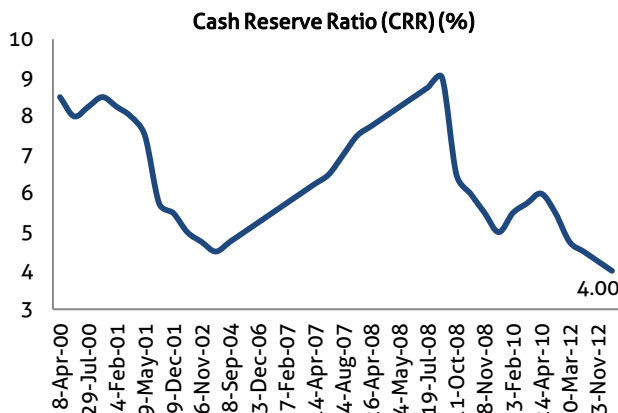
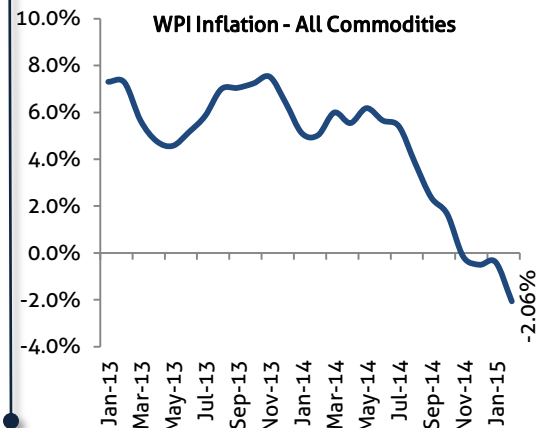
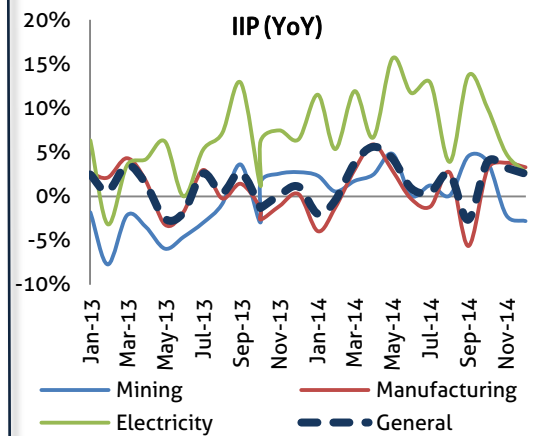
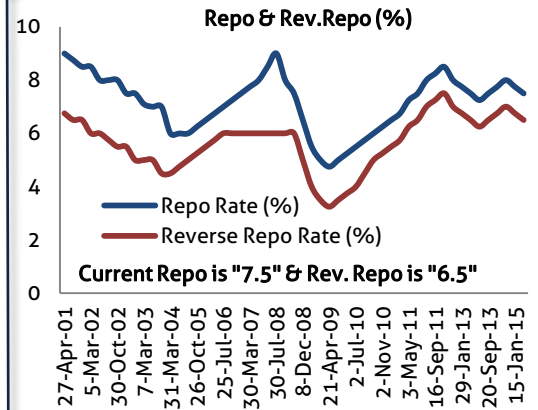
Global Forex	Closing	Chg	% Chg
EUR-USD	1.0919	(0.0027)	(0.25)
GBP-USD	1.4924	(0.0028)	(0.19)
USD-JPY	119.80	0.07	0.06

Bond Markets	Closing	Chg
10-yr bond	7.74	-0.8 bps
Interbank call	7.36	-33.45 bps



## Domestic News (Cont...)

- ❖ Pharmaceutical major Dr Reddy's Laboratories Limited has entered into an agreement with Hetero Drugs, also from Hyderabad, under which Dr Reddy's has been licenced to distribute and market Sofosbuvir tablets in 400 mg strength in India. (BS)
- ❖ Parliament passing of key mining sector reforms, including the Coal Bill, is likely to herald significant changes for the sector, according to a report from Barclays Securities (India). (BS)
- ❖ The government is believed to have allotted the three cancelled coal blocks, for which JSPL and Balco had emerged as the highest bidders in the recently concluded auctions, to state-owned miner Coal India Limited. (BS)
- ❖ MRF, one of the major tyre makers in country, to invest Rs 4,500 crore in Tamil Nadu in next seven years. The company has bagged Ultra Mega Project Status for the proposed expansion. (BS)
- ❖ Hyderabad-based Vivimed Labs Limited informed the stock exchanges that it has appointed Umanath Varahabhotla as an additional director of the company. (BS)
- ❖ Media firm Zee Entertainment Enterprises Ltd (ZEEL) has launched a general entertainment channel 'Zee Hiburan' in Indonesia. (BS)
- ❖ The rise in government borrowings through bonds is impeding the growth of the corporate debt market in the country, Reserve Bank Deputy Governor R Gandhi said . (BS)
- ❖ Jindal Steel and Power Ltd (JSPL) moved the Delhi High Court against the decision of the Centre to cancel coal blocks allocated to it. (BS)
- ❖ SpiceJet on Monday said it has resolved its dispute with one of two lessors who had moved the Delhi High Court against the airline and secured an order for deregistration of six Boeing 737 planes. (BS)
- ❖ Wind turbine maker Suzlon has received share holder approval for the sale of its subsidiary Senvion to US-based private equity firm Centrebridge. The deal to sell Senvion was finalised in January for a billion Euros (about Rs 7200 crore). (BS)
- ❖ GMR Infra said its parent company GMR Holding has completed financing arrangements for its rights issue and has tied up Rs 1,250 crore to fund it. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
23-Mar-15	Lakshmi Vilas Bank Ltd	SUDHIR JAIN	BUY	1262000	96.1
23-Mar-15	Nava Bharat Ventures Ltd.	J CAIRD BMD MB	SELL	667964	175.0
23-Mar-15	Titagarh Wagons Limited	N.K. SECURITIES	SELL	101948	579.6
23-Mar-15	Venus Remedies Limited	N.K. SECURITIES	SELL	59605	113.8
23-Mar-15	Electrotherm (India) Ltd	AIREN ANIL KUMAR	SELL	202000	23.2

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
23-Mar-15	USHDI	UD TRADING GROUP HOLDING PTE LTD	B	1,554,694	292.0
23-Mar-15	FRL	SUDHIR JAIN	S	2,124,700	99.0
23-Mar-15	EXCELCROP	GEE BEE SECURITIES P LTD	B	96,138	895.0
23-Mar-15	TRANSPEK-\$	MINAL BHARAT PATEL	S	208,126	210.5
23-Mar-15	MAFATIND-\$	BHARAT JAYAMTILAL PATEL	B	289,453	131.1

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
524348	AARTIDRUGS	24-Mar-15	BONUS 1:1	25-Mar-15
502355	BALKRISIND	24-Mar-15	Spin Off	25-Mar-15
502355	BALKRISIND	24-Mar-15	Scheme of Arrangement	25-Mar-15
535355	BSLAPRND	24-Mar-15	Temporary Suspension	25-Mar-15
535349	BSLAPVDG	24-Mar-15	Temporary Suspension	25-Mar-15
535354	BSLAPVRG	24-Mar-15	Temporary Suspension	25-Mar-15
535356	BSLAPVRQ	24-Mar-15	Temporary Suspension	25-Mar-15
535351	BSLAVDND	24-Mar-15	Temporary Suspension	25-Mar-15
535353	BSLAVDQD	24-Mar-15	Temporary Suspension	25-Mar-15
521220	DAMOINDUS-\$	24-Mar-15	Interim Dividend - Rs.1.50	25-Mar-15
500125	EIDPARRY	24-Mar-15	Interim Dividend - Rs.2.00	25-Mar-15
531777	INTELVIS-\$	24-Mar-15	Amalgamation	25-Mar-15
533373	IPRU1099	24-Mar-15	Temporary Suspension	25-Mar-15
533375	IPRU1100P	24-Mar-15	Temporary Suspension	25-Mar-15
533369	IPRU1306	24-Mar-15	Temporary Suspension	25-Mar-15
533371	IPRU1307P	24-Mar-15	Temporary Suspension	25-Mar-15
533376	IPRU1692	24-Mar-15	Temporary Suspension	25-Mar-15
533372	IPRU1693	24-Mar-15	Temporary Suspension	25-Mar-15
535675	IPRU8065	24-Mar-15	Temporary Suspension	25-Mar-15
535676	IPRU8066	24-Mar-15	Temporary Suspension	25-Mar-15
535677	IPRU8119	24-Mar-15	Temporary Suspension	25-Mar-15
533106	OIL	24-Mar-15	Interim Dividend - Rs.10.00	25-Mar-15

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
23-Mar-15	GBP	CBI Industrial Trends Orders (Mar)			10
23-Mar-15	USD	Chicago Fed National Activity (Feb)			0.13
23-Mar-15	USD	Existing Home Sales (Feb)		4.95M	4.82M
23-Mar-15	EUR	Consumer Confidence (Mar)		-5.8	-6.7
24-Mar-15	JPY	Manufacturing PMI (Mar)			51.6
24-Mar-15	CNY	HSBC Manufacturing PMI (Mar)			50.7
24-Mar-15	EUR	Manufacturing PMI (Mar)		51.5	51
24-Mar-15	EUR	Services PMI (Mar)		54	53.7
24-Mar-15	GBP	CPI (YoY) (Feb)			0.003
24-Mar-15	GBP	PPI Input (YoY) (Feb)			-0.142
24-Mar-15	GBP	PPI Output (YoY) (Feb)			-0.018
24-Mar-15	GBP	RPI (YoY) (Feb)			0.011
24-Mar-15	USD	CPI (YoY) (Feb)		-0.001	-0.001
24-Mar-15	USD	House Price Index (Jan)			218.6
24-Mar-15	USD	Manufacturing PMI (Mar)			55.1
24-Mar-15	USD	New Home Sales (Feb)		480K	481K
25-Mar-15	USD	MBA 30-Year Mortgage Rate			0.0399
25-Mar-15	USD	Durable Goods Orders (MoM) (Feb)		0.004	0.028
26-Mar-15	GBP	Retail Sales (YoY) (Feb)			0.054
27-Mar-15	USD	GDP (QoQ) (Q4)		0.024	0.022

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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