

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	5892	0.05	CNX IT	8169	(0.39)
Sensex	19920	0.10	BANK NIFTY	10176	(0.35)
DowJones	15335	(0.43)	S&P CNX 500	4484	0.05
Nasdaq	3768	0.08	CNX FMCG	17906	(0.01)
Hangseng	23248	0.30	CNX REALTY	157	(0.22)
Shanghai	2213	0.27	CNX AUTO	4770	1.17
Nikkei	14687	(0.31)	CNX ENERGY	7775	0.14
Strait Times	3228	0.51	CNX PHARMA	7205	0.27
Kospi	1996	(0.58)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8270	(0.35)	Advances	1112	523
FTSE	6571	0.21	Declines	1203	631
CAC	4196	0.56	Unchanged	153	71
DAX	8665	0.34	Total	2468	1225

Nifty Gainers		
Company	Price(Rs)	Chg(%)
BAJAJ-AUTO	2034.60	2.80
TATAPOWER	81.15	2.72
NTPC	145.70	2.03
LT	828.00	1.97
CIPLA	433.10	1.68

Nifty Losers		
Company	Price(Rs)	Chg(%)
HINDALCO	112.30	(3.65)
BPCL	315.00	(2.60)
COALINDIA	297.20	(2.48)
JINDALSTEL	247.80	(2.04)
ACC	1090.00	(1.90)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
HATHWAY CAB	7.06	0.11	66.16
Pidilite Inds	6.48	0.37	17.32
KPIT CUMMIN	10.39	1.05	9.91
Info Edge India	2.00	0.24	8.17
Sobha Dev	4.06	0.57	7.11

Indian Forex	Closing	Chg	% Chg
USD/INR	62.659	0.138	0.22
GBP/INR	100.460	0.203	0.20
EUR/INR	84.596	(0.076)	(0.09)
JPY/INR	63.320	0.150	0.24

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29693	80
Silver (Rs/1kg)	48747	(239)

Commodities	Price	% Chg.
Crude (US\$/BBL)	103.3	(0.09)
Brent (US\$/BBL)	108.7	0.66
Gold (US/oz)	1324.2	(0.20)
Silver (US\$/oz)	21.7	(0.46)
Copper (US\$/MT)	7140.5	(0.56)
Alum (US\$/MT)	1753.5	(0.06)
Zinc(US\$/MT)	1845.0	0.08

ADR	Cl. Values	% Chg.
ICICI Bank	32.00	0.01
HDFC Bank	32.55	0.19
Infosys	48.61	0.15
Sterlite Inds.	6.22	0.00
Dr. Dedy's Labs	37.75	0.16
Wipro	10.32	(0.03)
Tata Motors	27.15	0.39

## Market Sensor

U.S market falls for the fourth straight session as investors remain concerned over budget talks and economic growth. Dow Jones Industrial Average was down 0.43% or 66.79 points at 15334.59. Nasdaq Composite was up 0.08% or 2.97 points at 3768.25. Standard & Poor's 500 was down 0.26% or 4.42 points at 1697.42.

Indian market ended yet another volatile trading session on a flattish note. The volatility in the market was mainly attributable due to expiry of the September series. Nifty ended the previous trading session with a gain of 0.05% or 2.70 points at 5892.45. On Friday's trading session, FII's sold net Rs.21.09 Cr in cash market and sold net Rs 583.74 in derivative segment. Whereas, DII sold net Rs.493.74 Cr in cash segment.

**Coming to today's trade market seems choppy and likely to remain rangebound. Moreover F&O clearing settlement scheduled on September 26,2013 may induce some sort of volatility, crucial support seen at 5850, breach of which might drag the Index further lower.**

## Global News

❖Canada retailers boosted sales in July, reversing a drop a month earlier and adding to evidence the nation's economy has rebounded from a slowdown. (Bloomberg)

❖Chinese cities, addicted to the money they raise by selling land to developers, are undermining the government's multiyear campaign to contain housing costs. (Bloomberg)

❖Nations from the U.S. to Russia and the European Union are set for a final showdown over the first-ever global commitment to designing an emissions-reduction market tool for the \$708 billion airline industry. (Bloomberg)

❖Growing concern over the outlook for hiring and wages shook U.S. consumer sentiment this month, raising the risk spending will contribute less to growth. (Bloomberg)

❖China's economy slowed this quarter as growth in manufacturing and transportation weakened in contrast with official signs of an expansion pickup, a private survey showed. (Bloomberg)

## Economic News

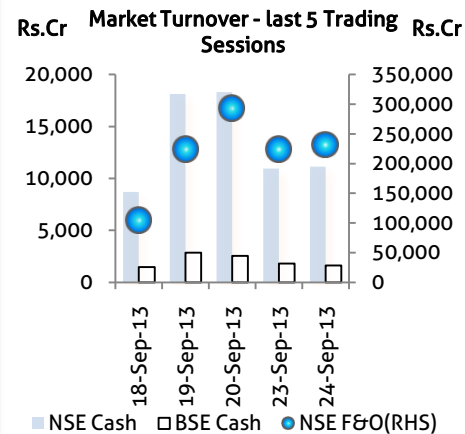
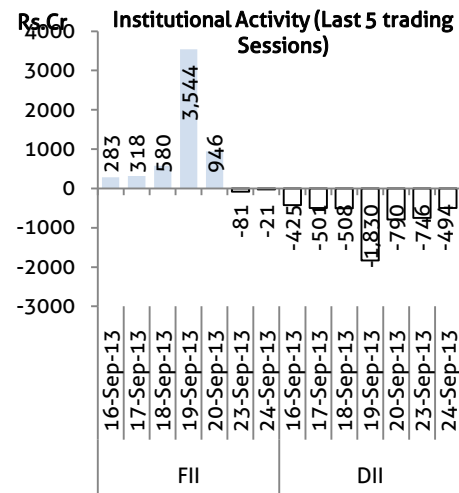
- ❖ The union cabinet is expected to consider two crucial policies to boost growth in the shale oil, gas and coal sector in a meeting scheduled to be held later. (BS)
- ❖ Public auditor CAG said that it will undertake performance audit of the new and renewable energy sector at all India level with a view to promoting alternative sources of energy. (BS)
- ❖ After its maiden attempt to use the riverine path to transport foodgrains from the mainland to the Northeast failed, the Food Corporation of India (FCI) is now exploring an alternative sea route. (BS)
- ❖ ONGC Videsh and its partners are mulling raising stake in Venezuela's \$20 billion Carabobo-I oil project even as India looks at raising crude oil imports from the Latin American country. (BS)
- ❖ The total fertiliser subsidy budget for the fiscal 2013-14 is anticipated to be in the range of Rs 65,000-70,000 crore excluding carryover subsidy of last years, a ratings agency said in a report. (BS)
- ❖ Staggered office timings for government employees to decongest traffic and staffers taking public transport to workplace once a week are part of a mega fuel conservation drive unveiled by Oil Minister M Veerappa Moily to save \$5 billion in oil imports. (BS)
- ❖ Achieving GDP growth of even 4.5 -5% in the 2013-14 fiscal "should be good" for India as there has been a gradual slowdown in the country's economic activity, a top official of consulting firm KPMG said. (BS)

## Domestic News

- ❖ The Service tax department said that Varun Shipping Co. Ltd in the current year, have not paid dues of about Rs 7 crores to the service tax department. (BS)
- ❖ Ashoka Buildcon said it has received orders valued at Rs 494.50 crore from Maharashtra State Electricity Company Ltd (MSEDCL). (BS)
- ❖ With the launch of its new scooter Jupiter, Chennai based TVS Motor Company is eyeing bigger market share of this market, targeting up to 18% of the total sales. (BS)
- ❖ The Cellular Operators Association of India (COAI), on Tuesday, said that the suggestion of the Telecom regulatory Authority of India (Trai) to follow uniform spectrum usage charge (SUC) of 3% of the adjusted gross revenue (AGR) of the operators would create a level-playing field for all the operators in the country. (BS)
- ❖ UB Group Chairman Vijay Mallya said he was ready to buy out stakes from Zuari Chemicals and Deepak Fertilisers in Mangalore Chemicals and Fertilizers Limited (MCF), reiterating his firm stand on holding onto control of the UB Group company. (BS)
- ❖ Siemens said it has partnered with Steel Authority of India (SAIL) to enhance the technical skills of the steel manufacturers' work force. (BS)
- ❖ ErosNow, the online entertainment platform of Eros International, is launching Bollywood blockbusters with acquiring contents from UTV and Viacom, to add to its catalogue of Bollywood hits. (BS)
- ❖ Markets love companies that create disruptive products because they create new markets. Godrej Consumer Products is set to create a new market with its latest paper-based mosquito repellent. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3476	0.0002	0.01
GBP-USD	1.5997	(0.0007)	(0.04)
USD-JPY	98.66	(0.09)	(0.09)

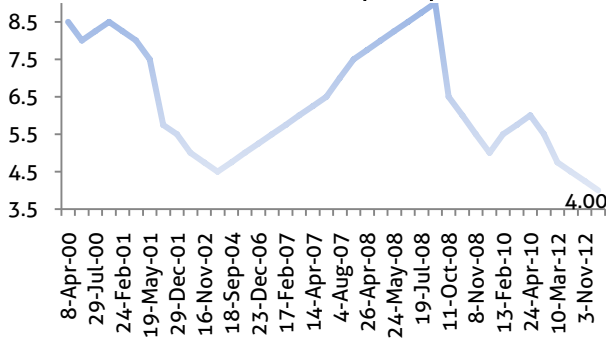
Bond Markets	Closing	Chg
10-yr bond	9.05	2.0 bps
Interbank call	9.48	-3.0 bps



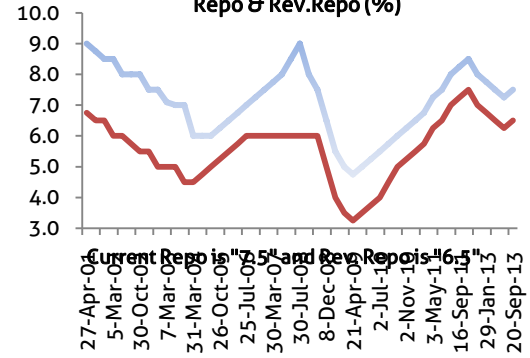
## Domestic News (Cont...)

- ❖ India's largest IT services provider Tata Consultancy Services (TCS), and GE entered into a joint venture to set up the first all-women business process services center in Riyadh, Kingdom of Saudi Arabia. (BS)
- ❖ Japanese drug major Daiichi Sankyo will work with US authorities to resolve the issue of a ban imposed by the USFDA on the import of drugs from the Mohali plant of its Indian unit Ranbaxy Laboratories. (BS)
- ❖ No-frill carrier IndiGo announced a whopping 516 per cent rise in gross profit at Rs 993 crore during 2012-13 compared to just Rs 64 crore in the previous financial year. (BS)
- ❖ After securing shareholders' approval for its proposed carving out of the Chennai plant from the company, Hindustan Motors (HM) said, it is in talks with two different set of investors for equity participation, separately in Uttarapa and Chennai plants post-demergers. (BS)
- ❖ Tata Steel said the steel consumption is likely to grow by about 5% in the current fiscal as a result of slowdown in demand from the real estate and automobile sectors. (BS)
- ❖ The US Food and Drug Administration (USFDA) is increasing its inspections of facilities of drug makers in India, the second largest provider of finished dose products to US, to ensure compliance of approved manufacturing norms. (BS)
- ❖ Kingfisher Airlines Ltd, which has been grounded for almost a year for want of cash, is in talks with a foreign investor for a potential stake sale, Chairman Vijay Mallya said on Tuesday, without naming any investor. (BS)
- ❖ Daiichi Sankyo Company Limited, the parent company of Ranbaxy has said on Tuesday that Ranbaxy is currently assessing its terms and practical applications for the Mohali plant. (BS)
- ❖ State-run telecom firms BSNL and MTNL said that they are working jointly to offer free roaming service to all their customers. (BS)
- ❖ National Spot Exchange Ltd (NSE) investors are planning to move court for the recovery of their investments through the attachment of the personal assets of the exchange's vice-chairman Jignesh Shah, its directors, members and their clients. (BS)
- ❖ Twenty years after parting with Thums Up, Limca and Gold Spot, Prakash Chauhan, the estranged brother of Ramesh Chauhan (promotor, Bisleri International), has launched a new carbonated drink, signalling his intent to get back into a space, which he claims is dear to him. (BS)

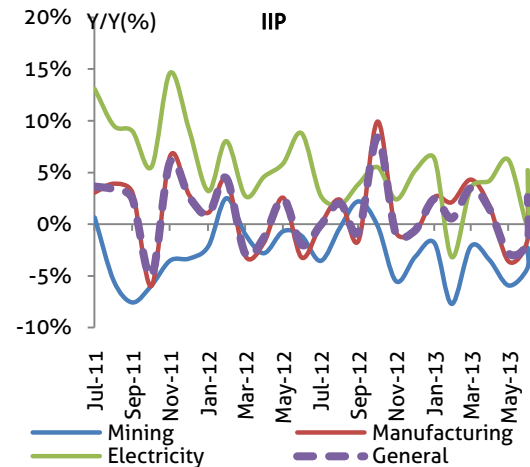
### Cash Reserve Ratio (CRR%)



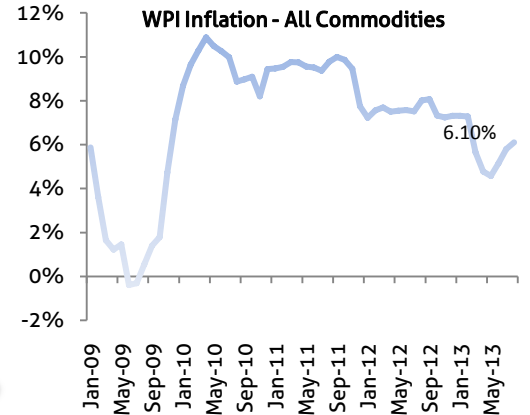
### Repo & Rev.Repo (%)



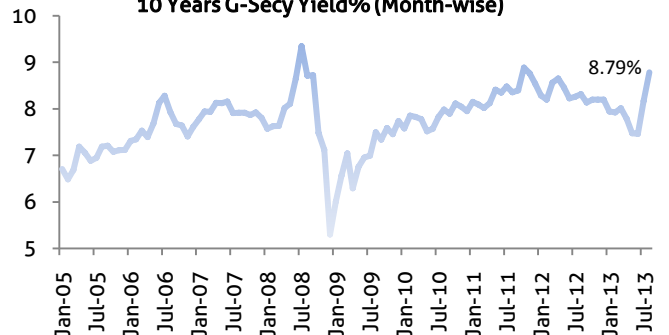
### Y/Y(%) IIP



### WPI Inflation - All Commodities



### 10 Years G-Secy Yield% (Month-wise)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
24-Sep-13	KPIT Cummins Infosystems	KISHOR PARSHURAM PATIL	SELL	1560000	132.5
24-Sep-13	Repro India Limited	ASIA ADVANTAGE FUND	SELL	161000	121.07
24-Sep-13	Repro India Limited	VOHRA SANJEEV INDERJIT	BUY	150000	121
24-Sep-13	Rushil Decor Limited	SHAH GIRABEN ATULBHAI	BUY	160000	43.7
24-Sep-13	First Leasing Company	PAT FINANCIAL CONSULTANTS PVT LTD	SELL	115000	20.46

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
24-Sep-13	Intellivate Cap	SIDDHARTH DINESH MEHTA	S	825,000	50
24-Sep-13	Mahindra Forg	YOGIRAJ MAKAR	B	500,000	66.5
24-Sep-13	Olympic Cards	NITESH RATANCHAND LODHA	S	350,000	33.59
24-Sep-13	Star Delta Transf	VINAYAK TRIMBAK SARKHOT	B	22,643	426.4
24-Sep-13	Mathew Easow	SASIKALA KAMLESH BAFNA	B	279,841	31.01

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
531147	ALICON	25-Sep-13	Dividend - Rs.2.00	-
532342	COMMECH TECH	25-Sep-13	Final Dividend - Rs.0.14	-
530393	DB Intl Stock	25-Sep-13	Dividend - Rs.0.30	-
507789	Jagsonpal Phar	25-Sep-13	Dividend - Rs.0.50	-
522249	Mayur Uniquoter-\$	25-Sep-13	Stock Split from Rs. 10/- to Rs.5/-	26-Sep-13
533080	MOLDTKPACK	25-Sep-13	Final Dividend - Rs.1.50	-
511644	Omega Interact	25-Sep-13	Consolidation of Shares	-
511644	Omega Interact	25-Sep-13	Reduction of Capital	-
503657	Veer Energy	25-Sep-13	Dividend - Rs.0.06	-
505232	VELJAN	25-Sep-13	Dividend - Rs.7.50	-
519105	AVT Nat Products	26-Sep-13	BONUS 1:1	-
522163	DIAMONPOWER-\$	26-Sep-13	Dividend - Rs.1.00	-
524808	Phyto Chem	26-Sep-13	Dividend - Rs.1.00	-
518053	Sri Chakra Cem	26-Sep-13	Reduction of Capital	28-Sep-13
506235	Alembic	27-Sep-13	BONUS 1:1	30-Sep-13
530967	ARICENTINF	30-Sep-13	Stock Split from Rs. 10/- to Rs.5/-	01-Oct-13
533276	BS Ltd	30-Sep-13	BONUS 1:1	01-Oct-13
534734	ICVL Chem	30-Sep-13	Stock Split from Rs.10/- to Re.1/-	01-Oct-13
534733	ICVL Steels	30-Sep-13	Stock Split Rs.10/- to Re.1/-	01-Oct-13
534732	Intellivate Cap	30-Sep-13	Stock Split from Rs. 10/- to Re.1/-	01-Oct-13
503637	Dhanleela Inv	10-Oct-13	Stock Split from Rs. 10/- to Rs.2/-	12-Oct-13

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
23-Sep-13	CNY	Chinese HSBC Manufacturing PMI		50.9	50.1
23-Sep-13	EUR	Manufacturing PMI		51.8	51.4
23-Sep-13	USD	Chicago Fed National Activity			-0.15
23-Sep-13	USD	Manufacturing PMI		54	53.1
24-Sep-13	USD	House Price Index (MoM)			0.70%
24-Sep-13	USD	CB Consumer Confidence		79.8	81.5
24-Sep-13	USD	Richmond Manufacturing Index			14
25-Sep-13	GBP	CBI Distributive Trades Survey		24	27
25-Sep-13	USD	Durable Goods Orders (MoM)		0.20%	-7.40%
25-Sep-13	USD	New Home Sales		420K	394K
26-Sep-13	EUR	M3 Money Supply (YoY)		2.20%	2.20%
26-Sep-13	GBP	Current Account		-12.0B	-14.5B
26-Sep-13	GBP	GDP (YoY)		1.50%	1.50%
26-Sep-13	USD	GDP (QoQ)		2.60%	2.50%
26-Sep-13	USD	Initial Jobless Claims		325K	309K
26-Sep-13	USD	Pending Home Sales (MoM)		-0.70%	-1.30%
26-Sep-13	USD	KC Fed Manufacturing			8
26-Sep-13	GBP	GfK Consumer Confidence		-11	-13
27-Sep-13	JPY	Tokyo CPI (YoY)			0.50%
27-Sep-13	GBP	Nationwide HPI (MoM)		0.50%	0.60%
27-Sep-13	EUR	Business and Consumer Survey		96	95.2
27-Sep-13	EUR	Consumer Confidence		-15	-15.6
27-Sep-13	USD	Core PCE Price Index (MoM)		0.10%	0.10%
27-Sep-13	USD	Personal Spending (MoM)		0.30%	0.10%
27-Sep-13	USD	Michigan Consumer Sentiment		78	76.8

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
27-Sep-13	INR	Indian Foreign Debt (USD)			390.00B

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