

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8684	(0.95)	CNX IT	12459	(1.38)
Sensex	28747	(0.90)	BANK NIFTY	18538	(1.04)
DowJones	18214	(0.06)	S&P CNX 500	7078	(0.93)
Nasdaq	4988	0.42	CNX FMCG	22071	(1.01)
Hangseng	24904	0.01	CNX REALTY	3686	(2.25)
Shanghai	3301	0.07	CNX AUTO	8641	(1.60)
Nikkei	18799	0.07	CNX ENERGY	8507	0.47
Strait Times	3425	(0.02)	CNX PHARMA	11412	(1.05)
Kospi	1989	(0.21)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9622	(0.80)	Advances	1076	433
FTSE	6950	0.21	Declines	1750	1031
CAC	4911	0.58	Unchanged	105	64
DAX	11327	1.04	Total	2931	1528

Nifty Gainers		
Company	Price(Rs)	Chg(%)
NTPC	152.15	4.18
LUPIN	1715.00	3.05
DLF	150.50	2.07
NMDC	137.95	1.47
ONGC	321.00	1.21

Nifty Losers		
Company	Price(Rs)	Chg(%)
BANKBARODA	172.00	(2.91)
IDFC	164.60	(2.55)
INFY	2259.65	(2.50)
SUNPHARMA	869.30	(2.41)
MARUTI	3498.90	(2.26)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
SUNDARFIN	17.49	0.0	523
RCBFIIBG	59.21	0.1	411
BOROSIL	0.65	0.0	51
INFRADEL	347.65	10.2	34
OIL	7.15	0.4	17

Indian Forex	Closing	Chg	% Chg
USD/INR	61.940	(0.107)	(0.17)
GBP/INR	96.242	0.212	0.22
EUR/INR	70.388	(0.041)	(0.06)
JPY/INR	52.060	(0.220)	(0.42)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26575	35
Silver (Rs/1kg)	37015	185

Commodities	Price	% Chg.
Crude (US\$/BBL)	48.8	(3.79)
Brent (US\$/BBL)	60.6	(1.25)
Gold (US/oz)	1209.8	0.16
Silver (US\$/oz)	16.6	0.06
Copper (US\$/MT)	5935.5	2.25
Alum (US\$/MT)	1798.5	0.84
Zinc(US\$/MT)	2073.0	0.85

ADR	Cl. Values	% Chg.
ICICI Bank	11.12	0.12
HDFC Bank	61.18	0.82
Infosys	36.58	(0.19)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	52.70	0.25
Wipro	13.89	(0.12)
Tata Motors	48.65	0.22

## Market Sensor

US market closed narrowly mixed on Thursday, with stocks near recent highs, as lackluster economic data and oil concerns weighed on investor sentiment. Dow Jones Industrial Average was down 0.06% or 10.15 points at 18214.42. Nasdaq Composite was up 0.42% or 20.75 points at 4987.89. Standard & Poor's 500 was down 0.15% or 3.12 points at 2110.74.

Indian equity market saw unwinding pressure as Rail Budget fail to create excitement in the market. Nifty ended the previous trading session with a decline of 0.95% or 83.40 points at 8683.85. On Thursday's trading session, FII's bought Rs.2312.15 Cr in cash market and sold net Rs.1830.74 in derivative segment. Whereas, DII bought net Rs.340.79 Cr in cash segment.

**Coming to today's trade Nifty to remain volatile, crucial intraday support seen at 8640 followed by 8600 while resistance exist at 8740 and then at 8780.**

## Global News

❖ Ghana has struck a deal with the International Monetary Fund aimed at stabilising its troubled economy. The three-year deal follows months of talks prompted by the government's failure to meet targets on inflation, the budget deficit and growth. (BBC)

❖ Business investment in the UK has fallen for the second quarter in a row, recording the biggest fall since 2009. Spending by business fell by 1.4% in the fourth quarter from the previous three-month period. (BBC)

❖ US inflation remained negative in January due to steep falls in the price of petrol, official figures have shown. The Consumer Price Index fell by 0.7% in the month, and by 0.1% from a year earlier - the first annual drop in five years - the Department of Labor said. (BBC)

❖ Loans by China's state-owned banks to Latin American countries rose by 71% to \$22bn (£14bn) in 2014, according to estimates published by the China-Latin America Finance Database. (BBC)

❖ A leaked draft of what the European Union wants excluded from a new trade deal with the United States has been obtained by the BBC. The document describes itself as the EU's "initial offer" in negotiations over the transatlantic trade and investment partnership (TTIP). (BBC)

## Economic News

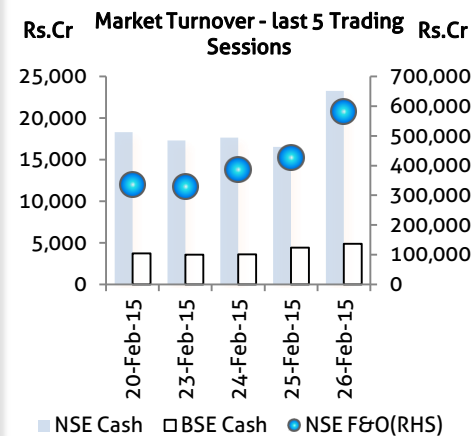
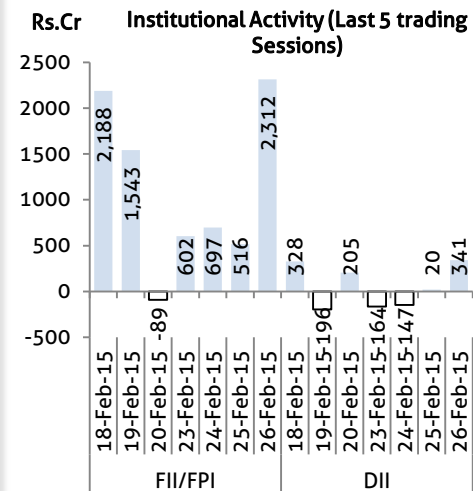
- ❖ Indian Railways will play a pivotal role in reviving economic growth in the country, Railway Minister Suresh Prabhu made it amply clear on Thursday. He announced an unprecedented increase of over 50 per cent in its proposed investments to over Rs 1 lakh crore next financial year while presenting the 2015-16 Railway Budget in the Lok Sabha. (BS)
- ❖ Indian railways will undergo a paradigm change with the introduction of faster trains, modern stations and skilled staff, according to the White Paper presented by Railway Minister Suresh Prabhu in Parliament on Thursday even as it stressed on the need for continued investments and resources for development. (BS)
- ❖ The Supreme Court on Thursday allowed the auction of telecom spectrum, scheduled to start on March 4, on the condition that its outcome wouldn't be finalised without the court's permission. (BS)
- ❖ Money stuck in appeals with tax commissioners in 2013-14 adds to Rs 3 lakh crore, according to the annual report of the finance ministry. (BS)
- ❖ The Centre has appointed Siraj Hussain, an Uttar Pradesh cadre Indian Administrative Service (IAS) Officer of the 1979 batch, the new agriculture secretary. (BS)
- ❖ Reserve Bank Deputy Governor S S Mundra said that state-run banks' capital needs to comply with Basel-III regulations may overshoot the earlier estimate of Rs 2.4 trillion, and also expressed reservations about the move to infuse funds in banks selectively. (BS)
- ❖ India's per capita income rose by 37.6% to Rs 88,533 in the last four years to 2014-15, Parliament was informed. (BS)
- ❖ Standard & Poor's sharply raised India's growth forecasts for the next several years to reflect a recent change in how gross domestic product is calculated by the government, and said the economy should be a "bright spot" in Asia. (BS)
- ❖ India is likely to meet the central bank's inflation target of 6 percent by January 2016, while economic growth is expected to gradually pick up, Reserve Bank of India Deputy Governor S S Mundra said on Thursday. (BS)
- ❖ With a decline in gold imports, Commerce Ministry has sought reduction in import duty on gold, a step that could boost exports and manufacturing of gems and jewellery. (BS)
- ❖ The defence budget of India—the world's largest arms importer—has more than doubled over the past decade from Rs 80,500 crore to Rs 229,000 crore for the financial year 2014-15. (BS)
- ❖ The Finance Commission recommendations have come as a ray of light for the cash-strapped BJP government in Maharashtra. (BS)

## Domestic News

- ❖ The exclusive consortium of Bharat Electronics Limited (BEL) and Rolta India Limited has been selected as a development agency for a more than Rs 50,000 crore Battlefield Management System (BMS) project by the Defence Ministry. (BS)
- ❖ Country's largest telecom player Bharti Airtel has raised Rs 1,925 crore (about \$310 million) by selling nearly 3% stake in its tower unit - Bharti Infratel. (BS)
- ❖ State Bank of India (SBI) received shareholders' approval for raising Rs 15,000 crore through a public offer, including a rights issue, to fund business and meet global capital adequacy norms. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1205	0.0007	0.06
GBP-USD	1.5425	0.0018	0.12
USD-JPY	119.22	(0.19)	(0.16)

Bond Markets	Closing	Chg
10-yr bond	7.73	1.50 bps
Interbank call	7.75	17.26 bps



## Domestic News (Cont...)

❖ The Essar group has shown interest in taking over Nokia's mobile handset manufacturing plant near Chennai, which has been frozen over tax claims. (BS)

❖ Panasonic has set a target to increase its market share in the smartphone segment to five% from around 2-3% in India currently. To support the target the company is planning to launch 5-6 smartphones every quarter in the last 12 months and plans to spend around Rs 125 crore on brand building. (BS)

❖ Isha Ambani, daughter of RIL Chairman Mukesh Ambani and Radhika PIRAMAL, daughter of VIP Industries' Chairman, Dilip PIRAMAL are named by Forbes magazine among its 12 "power businesswomen" from Asia. 23-year-old Isha is a Director at Reliance Jio Infocomm and Reliance Retail Ventures while Radhika is the MD of VIP Industries. (BS)

❖ Central transmission utility Power Grid Corporation has sought \$500 million loan assistance from the World Bank for financing projects. (BS)

❖ Glenmark Pharmaceuticals announced receipt of approval from the US health regulator to sell its generic version of AbbVie Inc's blood pressure drug Tarka in the American market. (BS)

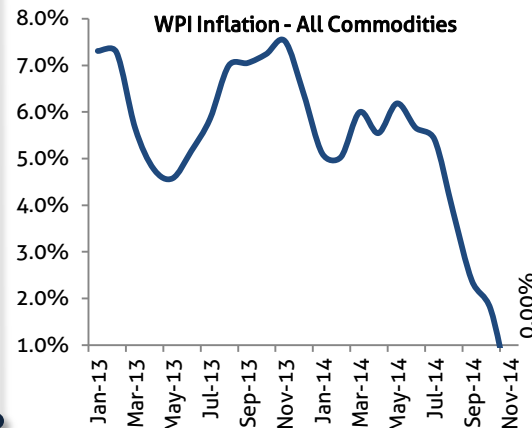
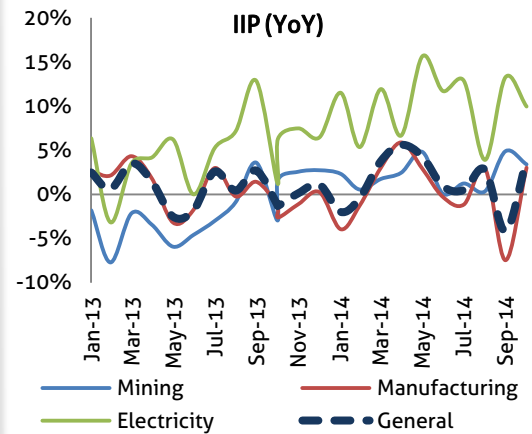
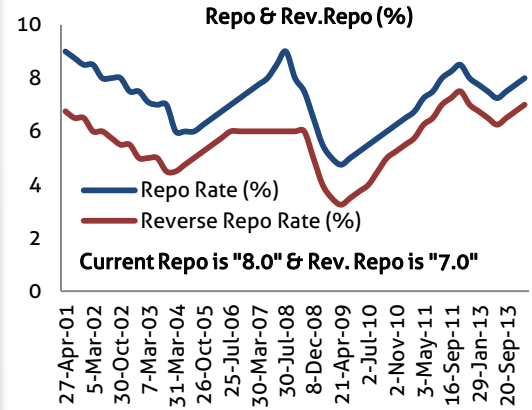
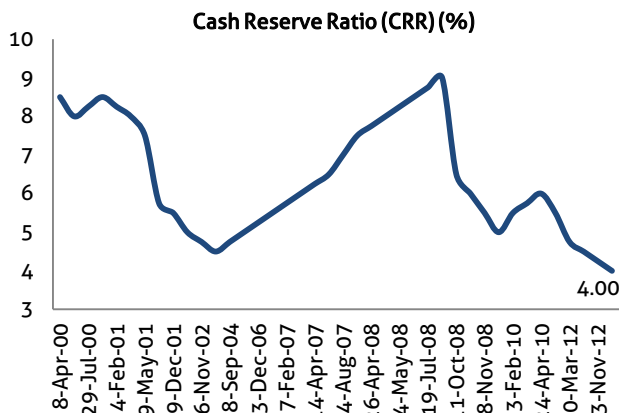
❖ Financial Technologies has asked its shareholders to oppose the proposed 'forced' merger of crisis-hit National Spot Exchange Ltd (NSE) with itself. (BS)

❖ Following the several online shopping festivals for apparel, electronics and durables in India, price comparison portalJunglee.com is hosting India's first online automobile shopping festival, which starts and will end on March 8, 2015. (BS)

❖ GoAir has appointed Tim Jordan, former commercial head of Cebu Pacific Airlines, as its new chief commercial officer. (BS)

❖ Budget carrier SpiceJet has finally received the much-need funding, with the new owner Ajay Singh infusing Rs 500 crore in the airline as part of his Rs 1,500 crore investment plan to revive it. (BS)

❖ The special investigation team (SIT) on black money has asked the Reserve Bank of India (RBI) to provide it with HSBC India's financial transaction details for financial years 2011-12 and 2012-13, according to sources in the know. The SIT will also ask the RBI for details of transactions over the last 15 years, they have said. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Feb-15	Bharti Infratel Ltd.	BHARTI AIRTEL LIMITED	SELL	22014681	350.1
26-Feb-15	L&T Finance Holdings Ltd	LARSEN & TOUBRO LIMITED	SELL	24067855	67.0
26-Feb-15	Titagarh Wagons Limited	N.K. SECURITIES	SELL	564685	577.6
26-Feb-15	ABG Shipyard Limited	N.K. SECURITIES	SELL	466066	249.9
26-Feb-15	Kalindee Rail Nirman (Eng)	N.K. SECURITIES	SELL	738098	135.7

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Feb-15	INFRATEL	BHARTI AIRTEL LIMITED	S	32,985,319	350.1
26-Feb-15	SUNDARMFN	MADAPUSI SANKARAMPADI PARTHASARATHY	S	1,726,012	1520.0
26-Feb-15	BOROSIL	GUJARAT FUSION GLASS LLP	S	63,980	1673.0
26-Feb-15	USHDI	UD TRADING GROUP HOLDING PTE LTD	B	310,300	320.0
26-Feb-15	TWL	Quadeye Securities Pvt Ltd	S	129,740	575.6

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
506248	AMNPLST	27-Feb-15	Stock Split from Rs. 10/- to Rs.2/-	02-Mar-15
537690	H371F29DG2	27-Feb-15	Redemption of Mutual Fund	02-Mar-15
537691	H371F29DQ2	27-Feb-15	Redemption of Mutual Fund	02-Mar-15
537693	H371F29RD2	27-Feb-15	Redemption of Mutual Fund	02-Mar-15
537692	H371F29RG2	27-Feb-15	Redemption of Mutual Fund	02-Mar-15
524735	HIKAL	27-Feb-15	Stock Split from Rs.10/- to Rs.2/-	02-Mar-15
533353	IPRU1073	27-Feb-15	Temporary Suspension	02-Mar-15
533355	IPRU1074P	27-Feb-15	Dividend On Mutual Fund	02-Mar-15
533355	IPRU1074P	27-Feb-15	Temporary Suspension	02-Mar-15
533357	IPRU1304	27-Feb-15	Temporary Suspension	02-Mar-15
533359	IPRU1305P	27-Feb-15	Temporary Suspension	02-Mar-15
533359	IPRU1305P	27-Feb-15	Dividend On Mutual Fund	02-Mar-15
533356	IPRU1688	27-Feb-15	Dividend On Mutual Fund	02-Mar-15
533356	IPRU1688	27-Feb-15	Temporary Suspension	02-Mar-15
533360	IPRU1689	27-Feb-15	Temporary Suspension	02-Mar-15
533360	IPRU1689	27-Feb-15	Dividend On Mutual Fund	02-Mar-15
534037	IPRU1879	27-Feb-15	Redemption of Mutual Fund	-
534038	IPRU1880	27-Feb-15	Redemption of Mutual Fund	-
535031	IPRU8063	27-Feb-15	Temporary Suspension	02-Mar-15
535032	IPRU8064	27-Feb-15	Dividend On Mutual Fund	02-Mar-15
535032	IPRU8064	27-Feb-15	Temporary Suspension	02-Mar-15
535033	IPRU8117	27-Feb-15	Temporary Suspension	02-Mar-15

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
Time	Cur.	Event	Actual	Forecast	Previous
23-Feb-15	USD	Existing Home Sales (Jan)		5.03M	5.04M
23-Feb-15	USD	Dallas Fed Mfg Business Index (Feb)			-4.4
24-Feb-15	EUR	CPI (MoM) (Jan)		-1.60%	-0.10%
24-Feb-15	USD	S&P/CS HPI Composite - 20 s.a. (MoM) (Dec)		0.80%	0.70%
24-Feb-15	USD	CB Consumer Confidence (Feb)		100	102.9
25-Feb-15	CNY	HSBC Manufacturing PMI (Feb)			49.7
25-Feb-15	USD	MBA 30-Year Mortgage Rate			3.93%
25-Feb-15	USD	New Home Sales (Jan)	487K		481K
26-Feb-15	GBP	GDP (YoY) (Q4)		2.70%	2.70%
26-Feb-15	EUR	Business Climate (Feb)		0.2	0.2
26-Feb-15	EUR	Consumer Confidence (Feb)		-7	-8.5
26-Feb-15	EUR	Industrial Sentiment (Feb)		-5	-5
26-Feb-15	USD	CPI (MoM) (Jan)		-0.50%	-0.40%
26-Feb-15	USD	Durable Goods Orders (MoM) (Jan)		2.00%	-3.30%
26-Feb-15	USD	House Price Index (MoM) (Dec)			0.80%
26-Feb-15	USD	KC Fed Manufacturing Index (Feb)			-2
26-Feb-15	USD	Initial Jobless Claim			
27-Feb-15	JPY	Household Spending (YoY) (Jan)		-4.10%	-3.40%
27-Feb-15	JPY	Tokyo CPI (YoY) (Feb)			2.30%
27-Feb-15	JPY	Unemployment Rate (Jan)		3.40%	3.40%
27-Feb-15	JPY	Industrial Production (MoM) (Jan)		2.70%	0.80%
27-Feb-15	GBP	GfK Consumer Confidence (Feb)		2	1
27-Feb-15	JPY	Housing Starts (YoY) (Jan)		-11.30%	-14.70%
27-Feb-15	USD	GDP (QoQ) (Q4)		2.10%	2.60%
27-Feb-15	USD	Real Consumer Spending (Q4)			4.30%
27-Feb-15	USD	Chicago PMI (Feb)		58.5	59.4
27-Feb-15	USD	Michigan Consumer Sentiment (Feb)		96.5	93.6
27-Feb-15	USD	Pending Home Sales (MoM) (Jan)			-3.70%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
27-Feb-15	INR	Federal Fiscal Deficit (Jan)			5,323.81B
27-Feb-15	INR	Infrastructure Output (YoY) (Jan)			2.40%

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