

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8342	(2.21)	CNX IT	11902	(2.65)
Sensex	27458	(2.33)	BANK NIFTY	17832	(2.61)
DowJones	17678	(0.23)	S&P CNX 500	6846	(1.81)
Nasdaq	4863	(0.27)	CNX FMCG	19691	(1.33)
Hangseng	24443	(0.22)	CNX REALTY	3331	(3.12)
Shanghai	3668	(0.39)	CNX AUTO	8385	(1.53)
Nikkei	19547	0.39	CNX ENERGY	8196	(1.48)
Strait Times	3440	0.24	CNX PHARMA	12677	(1.88)
Kospi	2022	(0.04)	Advances / Declines	BSE	NSE
Taiwan	9551	(0.71)	Advances	906	452
FTSE	6895	(1.37)	Declines	1904	1050
CAC	5006	(0.29)	Unchanged	106	52
DAX	11844	(0.18)	Total	2916	1554

Nifty Gainers		
Company	Price(Rs)	Chg(%)
ULTRACEMCO	2817.90	1.88
BHARTIARTL	400.00	1.27
AMBUJACEM	251.05	0.90
BPCL	754.75	0.81
LT	1643.10	0.63

Nifty Losers		
Company	Price(Rs)	Chg(%)
PNB	148.55	(4.47)
HDFC	1298.90	(4.11)
WIPRO	635.00	(3.95)
SSLT	189.30	(3.81)
DLF	160.00	(3.06)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
SHRIRAMCIT	0.33	0.0	25
INFRATEL	6.37	0.7	9
NESTLEIND	0.25	0.0	8
CENTRALBK	35.03	5.1	7
SCHNEIDER	4.84	0.9	5

Indian Forex	Closing	Chg	% Chg
USD/INR	62.673	0.331	0.53
GBP/INR	93.263	0.617	0.67
EUR/INR	68.852	0.731	1.07
JPY/INR	52.750	0.680	1.31

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26847	587
Silver (Rs/1kg)	38541	591

Commodities	Price	% Chg.
Crude (US\$/BBL)	50.6	(0.41)
Brent (US\$/BBL)	58.4	0.40
Gold (US/oz)	1199.8	0.19
Silver (US\$/oz)	17.0	0.18
Copper (US\$/MT)	6230.0	1.56
Alum (US\$/MT)	1764.0	1.11
Zinc(US\$/MT)	2095.5	1.45

ADR	Cl. Values	% Chg.
ICICI Bank	10.21	0.15
HDFC Bank	57.70	0.39
Infosys	34.95	(0.07)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	54.06	(1.20)
Wipro	13.22	(0.31)
Tata Motors	43.34	(0.81)

Market Sensor

US market closed mildly lower on Thursday as equities failed to shake off the losses of the last three days and investors weighed geopolitical events ahead of earnings season. Dow Jones Industrial Average was down 0.23% or 40.31 points at 17678.23. Nasdaq Composite was down 0.27% or 13.16 points at 4863.36. Standard & Poor's 500 was down 0.24% or 4.90 points at 2056.15.

Indian equity market ended the F&O session on a lower note geopolitical factors and higher oil price negatively impacted the market. Nifty ended the previous trading session with a decline of 2.21% or 188.65 points at 8342.15. On Thursday's trading session, FII's sold Rs.521.23 Cr in cash market and sold net Rs.1499.52 in derivative segment. Whereas, DII bought net Rs.687.09 Cr in cash segment.

Global News

❖ UK retail sales grew more strongly than expected in February, up 0.7% compared with the previous month, according to the Office for National Statistics. Compared with February 2014, sales were 5.7% higher, boosted by the recovery in the housing market, the ONS said. (BBC)

❖ Oil prices rose and shares fell after Saudi Arabia, the world's biggest crude exporter, and its allies launched airstrikes on rebel targets in Yemen. The move has raised concerns that the conflict could spread in the oil-rich Middle East and possibly disrupt supplies from the region. (BBC)

❖ France has cut its budget deficit target for 2015 and signalled that the economic recovery is gathering pace. After the release of better-than-expected deficit data for 2014, Finance Minister Michel Sapin said there were reasons to be confident about growth. (BBC)

❖ Japan's annual core consumer inflation ground to a halt in February, the first time it has stopped rising in nearly two years, keeping the central bank under pressure to expand monetary stimulus later this year. (Reuters)

❖ The head of Greece's bank rescue fund maintained on Thursday that Athens has a legal claim to 1.2 billion euros in the euro zone's bailout fund, a day after European officials rejected its request. (Reuters)

Economic News

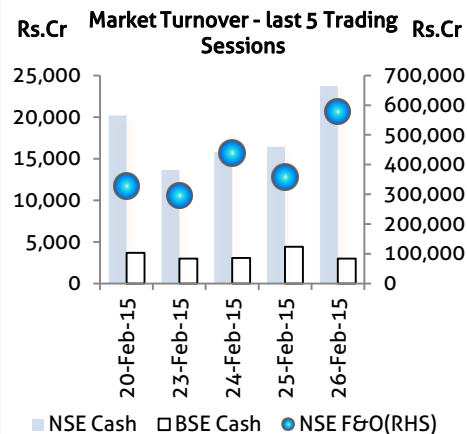
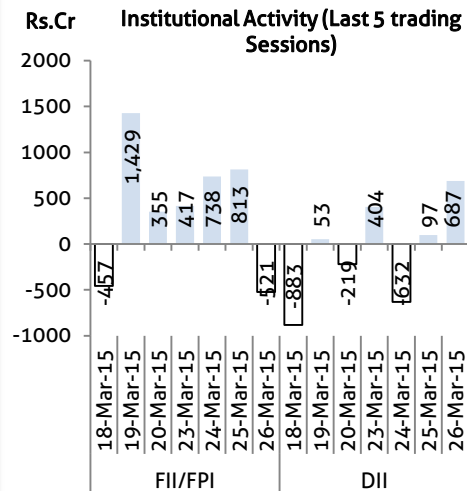
- ❖ Delhi Metro Rail Corporation (DMRC) Managing Director Mangu Singh tells Sudheer Pal Singh in an interview that the transporter is in need for a fare hike to maintain healthy operations and how DMRC is hopeful of continued JICA funding in future. Edited excerpts. (BS)
- ❖ Relative appreciation in India rupee against major currencies in the last 18 months has begun to hurt India's merchandise exports. Merchandise exports ex-oil and gems & jewellery is expected to grow by just 1.7 per cent in FY15 down from 6.9 per cent growth last fiscal and 5-year average export growth of 11.9 per cent in dollar terms. (BS)
- ❖ The year 2014-15 could well go as one of long-pending financial sector reforms, expected to have a lasting impact. From governance issues of the banking sector to higher foreign direct investment and overhaul of the monetary policy framework, with inflation targeting as the aim, these would shape the banking and financial sector for a long while. (BS)
- ❖ The efforts to reduce debt of Tamil Nadu Electricity Board (TNEB) is continuing, with the state government planning to take over Rs 2,000 crore of debt bond of Tamil Nadu Generation and Distribution Corporation (TANGEDCO) during the year 2015-16. (BS)
- ❖ The Supreme Court on Thursday allowed the government to finalise the spectrum auction bids and collect the initial payment amounting to Rs 28,000 crore out of Rs 1.09 lakh crore from the successful telecom companies before March 31. (BS)
- ❖ The National Green Tribunal has directed the Environment Ministry (MoEF) and Indian Bureau of Mines to submit a complete list of asbestos mines in the entire country with their status. (BS)
- ❖ Payment for spectrum won by companies in the auction concluded on Wednesday is expected to push up the debt on telecom operators to about Rs 3.5 lakh crore, leading to a significant rise in tariffs, says industry body Assocham. (BS)
- ❖ The Supreme Court has allowed the government to conclude the auction of telecom airwaves and collect initial payments from operators, multiple television channels reported on Thursday. (BS)
- ❖ Smaller dairy farms have proved to be an effective tool for increasing rural prosperity in parts of Asia, NDDDB chairman T Nanda Kumar has said. (BS)

Domestic News

- ❖ Cadila Healthcare continues moving from strength to strength as concerns over its Gujarat facility dissipate. The stock saw highs of Rs 1,760 in November and had corrected to a closing low of Rs 1,463 last month. It has since regained, to Rs 1,700 levels. (BS)
- ❖ Large-scale corporations in 's day and age need to evaluate and strategise unforeseen risks in order to be globally successful even as they balance their linkages with the political class, according to experts. (BS)
- ❖ Indian startup ecosystem, which has attracted top venture capital (VC) and private equity (PE) players from around the globe, is now enticing individual retail investors in the country. (BS)
- ❖ Eyeing leadership in the Super Sports segment, Bajaj Auto launched the Pulsar RS 200 bike, priced at Rs 1,18,500 and Rs 1,30,268 for the non ABS and ABS versions respectively, ex-showroom Maharashtra. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.0881	(0.0003)	(0.03)
GBP-USD	1.4851	0.0002	0.01
USD-JPY	119.33	0.14	0.12

Bond Markets	Closing	Chg
10-yr bond	7.80	1.40 bps
Interbank call	7.27	-1.73 bps



Domestic News (Cont...)

❖ Amruda Nair, the granddaughter of Late C P Krishnan Nair, the founder of the Leela Group, has become the joint managing director and chief executive officer of a hotel management company, jointly floated by a Qatar-based industrial conglomerate. (BS)

❖ Ratnagiri Gas & Power Pvt Ltd (RGGPL) has completely rejected MahaVitaran's (Maharashtra State Electricity Distribution Company) move to terminate power purchase agreement (PPA) for the procurement of power from the now closed 1,967 MW Dabhol project. (BS)

❖ Mark Fields, President and Chief Executive Officer, Ford Motor Company was at Sanand to inaugurate the company's second plant in the country. (BS)

❖ Mahindra & Mahindra has expressed an interest in buying car designer Pinfarina but no deal has been reached yet, the Italian company confirmed on Thursday. (BS)

❖ Payment solutions provider AGS Transact Technologies Ltd is aiming to conclude its up to Rs 1,350 crore (\$215.8 million) initial public offer (IPO) by September, two bankers involved in the process told Reuters. (BS)

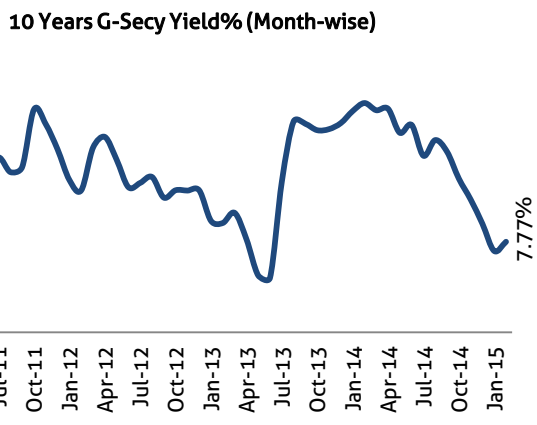
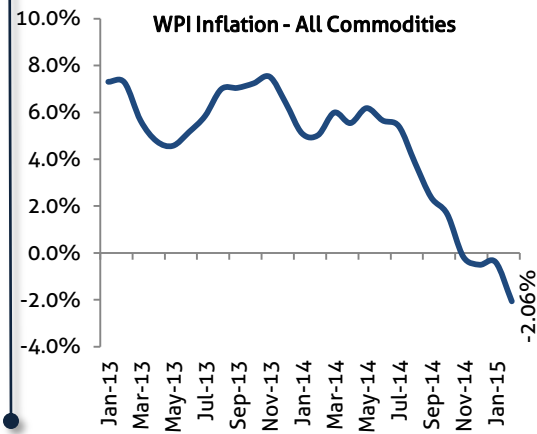
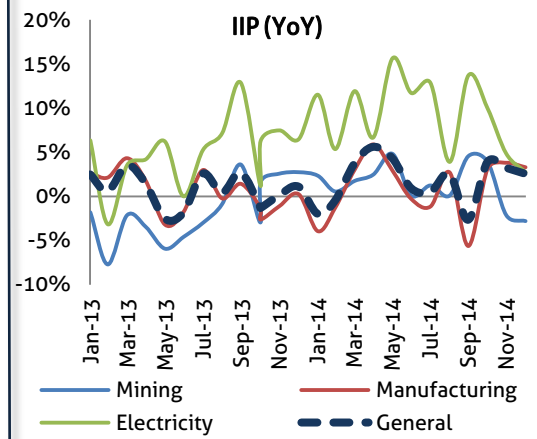
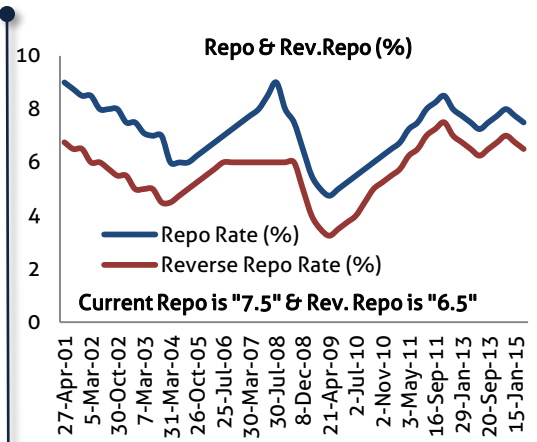
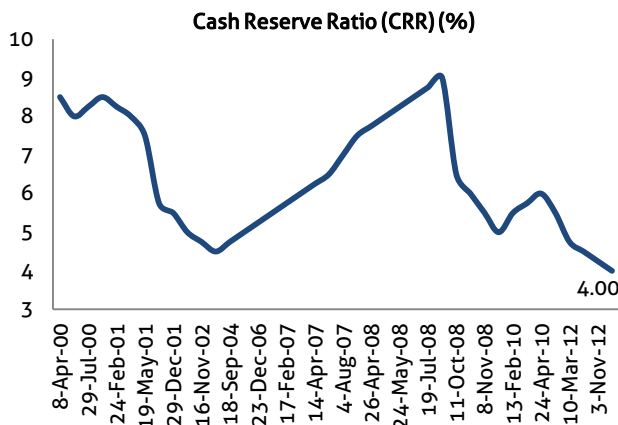
❖ Tyre and rubber industries in the country with turnover of over Rs 70,000 crore have expressed need for rapid upskilling of rubber value chain for realising full potential of the sector and making Make-in-India a success. (BS)

❖ With the production of thermal coal on the rise, the government is hopeful that state-owned Coal India will surpass its one billion tonne excavation target by 2020. (BS)

❖ The Madras High Court ordered the issuance of a notice to Spicejet on winding up petitions filed by five leasing companies. The lessors have claimed that the airline owe Rs 80 crore to them. (BS)

❖ The Cabinet Committee of Economic Affairs (CCEA) led by the Prime Minister Narendra Modi has approved a plan to use regassified LNG to restart stalled gas-based power projects in India. (BS)

❖ Insurance Australia Group Ltd will raise its stake to the maximum allowed 49% in a general insurance joint venture with State Bank of India, the lender said on Thursday, following rule changes earlier this month. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Mar-15	AmtekAuto-Roll Sett	BILLION PROPERTIES PRIVATE LIMITED	BUY	2025000	143.7
26-Mar-15	AXISCADES Engg Tech Ltd	RIKEEN P DALAL HUF	BUY	255000	295.5
26-Mar-15	Mirza International Ltd.	AARTI SUNIL ANANDPARA	BUY	654000	77.1
26-Mar-15	Prakash Steelage Ltd	HARIDARSHAN SALES PVT LTD	BUY	135000	126.5
26-Mar-15	Dolphin Offshore Enterpri	SUBHKAM VENTURES (I) PRIVATE LIMITED	BUY	100000	113.3

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
26-Mar-15	TGBHOTELS	NARENDRA GORMUKHDAS SOMANI	B	200,000	93.6
26-Mar-15	PRAKASHSTL	LILYGOLD MERCHANTS PRIVATE LIMITED	S	135,000	120.0
26-Mar-15	VMS	LILYGOLD MERCHANTS PRIVATE LIMITED	S	490,000	32.5
26-Mar-15	ALANKIT	GAURAV YADUV ANSHI	B	60,775	218.2
26-Mar-15	DOLPHINOFF-\$	SUBHKAM VENTURES (I) PRIVATE LIMITED	B	100,000	113.2

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
506395	COROMANDEL	27-Mar-15	Interim Dividend - Rs.2.00	30-Mar-15
512319	RAJLXIN	27-Mar-15	Stock Split from Rs. 10/- to Re.1/-	30-Mar-15
535346	RMFINAFDD5	27-Mar-15	Temporary Suspension	30-Mar-15
535345	RMFINAFDG5	27-Mar-15	Temporary Suspension	30-Mar-15
535347	RMFINAFDR5	27-Mar-15	Temporary Suspension	30-Mar-15
535350	RMFINAFRD5	27-Mar-15	Temporary Suspension	30-Mar-15
535348	RMFINAFRG5	27-Mar-15	Temporary Suspension	30-Mar-15
535352	RMFINAFRR5	27-Mar-15	Temporary Suspension	30-Mar-15
505790	FAGBEARING	30-Mar-15	Dividend - Rs.7.50	-
500249	KSBPUMPS	30-Mar-15	Final Dividend - Rs.5.50	-
519421	KSE-\$	30-Mar-15	Interim Dividend - Rs.20.00	31-Mar-15
532081	KSERASERA-\$	30-Mar-15	Stock Split from Rs.10/- to Re.1/-	31-Mar-15
511187	MAHAINV	30-Mar-15	Stock Split from Rs.10/- to Re.1/-	31-Mar-15
500126	MERCK	30-Mar-15	Dividend - Rs.6.00	-
532254	POLARIS	30-Mar-15	Interim Dividend - Rs.5.00	31-Mar-15
501061	SBBJ	30-Mar-15	Interim Dividend - Rs.14.30	31-Mar-15
523411	ADCINDIA	06-Apr-15	Dividend - Rs.-	07-Apr-15
500359	RANBAXY	06-Apr-15	Amalgamation	07-Apr-15
500570	TATAMOTORS	06-Apr-15	-	-
570001	TATAMTRDVR	06-Apr-15	-	-
500830	COLPAL	08-Apr-15	3rd Interim Dividend - Rs.-	09-Apr-15
500472	SKFINDIA	08-Apr-15	Final Dividend - Rs.2.50	-

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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