

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8361	(1.88)	CNX IT	11362	(0.89)
Sensex	27561	(1.96)	BANK NIFTY	18213	(2.27)
DowJones	17441	(0.73)	S&P CNX 500	6955	(1.69)
Nasdaq	5040	(0.96)	CNX FMCG	20151	(0.75)
Hangseng	24891	2.21	CNX REALTY	3508	(1.82)
Shanghai	3658	(1.81)	CNX AUTO	8306	(1.96)
Nikkei	20159	(0.94)	CNX ENERGY	8747	(2.12)
Strait Times	3292	(0.63)	CNX PHARMA	3754	(2.11)
Kospi	2034	(0.24)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8625	0.79	Advances	1066	430
FTSE	6505	(1.13)	Declines	1772	1075
CAC	4928	(2.57)	Unchanged	87	54
DAX	11056	(2.56)	Total	2925	1559

Nifty Gainers		
Company	Price(Rs)	Chg(%)
TECHM	522.00	2.14
ZEEL	393.50	0.63
BAJAJ-AUTO	2508.35	0.44
ASIANPAINT	850.55	0.18
-	-	-

Nifty Losers		
Company	Price(Rs)	Chg(%)
TATASTEEL	250.20	(5.60)
HEROMOTOCO	2599.05	(5.16)
HINDALCO	104.05	(4.85)
AXISBANK	555.95	(4.22)
CAIRN	167.60	(4.12)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
DHYANAFIN	3.33	0.1	32
ROLLT	13.34	0.5	25
JINDALSAW	48.02	2.6	19
CENTENKA	6.69	0.4	16
BALRAMCHIN	11.14	0.7	15

Indian Forex	Closing	Chg	% Chg
USD/INR	64.003	0.111	0.17
GBP/INR	99.435	0.332	0.34
EUR/INR	70.614	0.493	0.70
JPY/INR	51.850	0.290	0.56

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	24757	284
Silver (Rs/1kg)	33861	226

Commodities	Price	% Chg.
Crude (US\$/BBL)	47.0	(2.00)
Brent (US\$/BBL)	53.0	(2.90)
Gold (US/oz)	1093.5	(0.23)
Silver (US\$/oz)	14.6	(0.14)
Copper (US\$/MT)	5190.0	(0.66)
Alum (US\$/MT)	1600.5	0.38
Zinc(US\$/MT)	1933.0	(1.30)

ADR	Cl. Values	% Chg.
ICICI Bank	9.56	(0.17)
HDFC Bank	61.07	(0.44)
Infosys	16.74	(0.49)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	60.63	(0.48)
Wipro	12.13	(0.13)
Tata Motors	28.72	(1.01)

## Market Sensor

US market closed lower on Monday under pressure from an overnight plunge in the Shanghai Composite and a continued decline in commodities, amid a lackluster earnings season. Dow Jones Industrial Average was down 0.73% or 127.94 points at 17440.59. Nasdaq Composite was down 0.96% or 48.85 points at 5039.79. Standard & Poor's 500 was down 0.58% or 12.01 points at 2067.64.

Indian equity market made a gap down opening and shed close to two percent. Sentiments were down beat mainly on reaction to the proposal made by special investigation team (SIT) on black money to tighten rules on participatory notes. Nifty ended the previous day with a decline of 1.88% or 160.55 at 8361.00. On Monday's trading session, FII sold Rs.859.94 Cr in cash market and sold net Rs.954.37 in derivative segment. Whereas, DII bought net Rs.238.66 Cr in cash segment.

## Global News

❖ A gauge of U.S. business investment plans rebounded solidly in June, suggesting the drag on manufacturing from capital spending cuts was starting to ebb. (CNBC)

❖ China's central bank said on Tuesday that it will use various monetary tools to maintain appropriate levels of liquidity in the second half of this year. It added that the country's main economic indicators are steadily improving. (Reuters)

❖ Chinese industrial profits, which rose on an annual basis in April and May, dropped in June, adding to pressures on a economy that is struggling to regain momentum. (Reuters)

❖ International creditors want Greece to enact a third wave of politically sensitive reforms before they will release any money to keep the near bankrupt country afloat under a third bailout they began negotiating on Monday. (Reuters)

❖ Former Greek Finance Minister Yanis Varoufakis confirmed on Monday he had made secret preparations to hack into citizens' tax codes to create a parallel payment system after the disclosure provoked shock and disbelief in Greece. (Reuters)

❖ The International Monetary Fund warned on Monday that the euro zone's prospects were modest and that more money printing than planned may be needed. (Reuters)

## Economic News

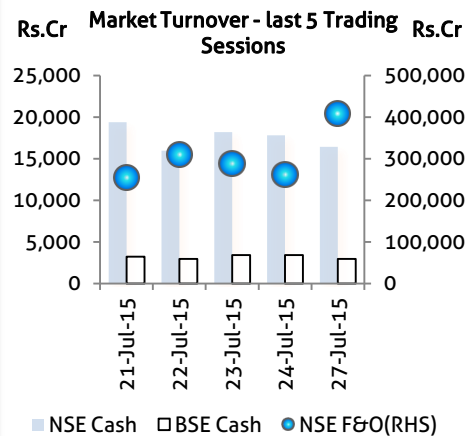
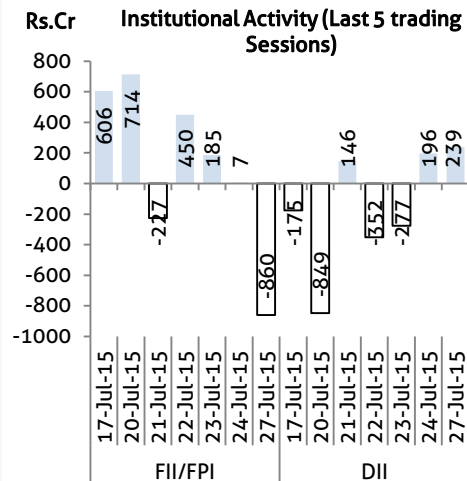
- ❖ The Reserve Bank is likely to maintain a status quo on rates in its third bi-monthly policy meet on August 4, taking into account "poor rains" and will go for a 50 basis points rate cut in early 2016, a Bank of America Merrill Lynch report said. (BS)
- ❖ The state-run Chhattisgarh Renewable Energy Development Agency (CREDA) had inked 104 agreements for setting up renewable energy projects during the Global Investors Meet 2012 but not a single project has taken shape. (BS)
- ❖ The guidelines issued some time back by the Haryana government for allotment of industrial plots in the Industrial Model Townships developed by the Haryana State Industrial and Infrastructure Corporation across the state may hamper the growth of micro, small and medium enterprises (MSMEs) in the state. (BS)
- ❖ Finance Minister Arun Jaitley said that the government will take a view on the draft Indian Financial Code, which proposes to dilute powers of the RBI chief, after receiving comments from stakeholders. (BS)
- ❖ The pending decision on sharing of resources between the Centre and states on Centrally Sponsored Schemes (CSS) by the sub-group of chief ministers has led to a number of central government ministries facing a cash crunch, with even the Finance Ministry refusing to release funds to them for the said schemes till the issue is resolved. (BS)
- ❖ After the Special Investigative Team's (SIT) recommendations spooked markets, Finance Minister Arun Jaitley on Monday tried to calm jittery investors on participatory notes (P-notes). (BS)
- ❖ The BJP-led government in Maharashtra is working on a proposal which will exempt small cars from paying toll tax for road projects worth over Rs 200 crore that will be implemented on a build operate transfer (BOT) basis. (BS)
- ❖ Global rating agency Moody's investor poll shows that global fund managers expect moderation in fresh slippages of India banks. However, it said their woes from problem loans are not likely to go away any time soon. (BS)
- ❖ With onion prices rising up to Rs 40 per kg in the national capital, the government has ordered to import 10,000 tonnes of the kitchen staple from countries including Pakistan, China, Egypt. (BS)

## Domestic News

- ❖ Tech Mahindra reported net profit of Rs 676 crore for the first quarter ended June 30, 2015 up 7.2% year-on-year and 43% on sequential basis. Net profits were up due to forex gains. (BS)
- ❖ The Madras High Court asked Gammon India and Chennai Metro Rail Ltd (CMRL) to suggest names of experts who could be appointed as arbitrator to hear the dispute between the two parties. The development comes on a petition filed by Gammon India seeking a stay on the termination of its contract by Chennai Metro Rail Ltd. (BS)
- ❖ Buyers of mini trucks used for last mile connectivity are upgrading to more powerful pick-ups and steadily replacing the once popular low-tonnage light cargo vehicles. (BS)
- ❖ Tata Motors, the country's largest commercial vehicle manufacturer, is gearing up to launch new products and variants on its highly-successful Ace mini-truck platform, according to senior vice-president (commercial vehicles business unit) R Ramakrishnan. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1080	(0.0008)	(0.08)
GBP-USD	1.5566	0.0005	0.03
USD-JPY	123.44	0.1900	0.15

Bond Markets	Closing	Chg
10-yr bond	7.98	2.00 bps
Interbank call	7.12	-0.25 bps



## Domestic News (Cont...)

❖ The European Union's ban on 700 generic drug products, based on data integrity issues found at an Indian clinical research facility where they were subjected to bioequivalence studies, would impact exports worth at least \$1 billion from India, according to Pharmaceutical Export Promotion Council of India (Pharmexcil). (BS)

❖ Saraansh Tandon, Namit Bajoria and Ruba Singh are strong believers in diversification. Not content with the thought of managing their families' established businesses, they ventured into emerging fields, introduced new products and took their brands into uncharted territory. (BS)

❖ With the direct selling industry aiming to cut the share of imports from the current 30% to 10% by 2020, it could prove to be a huge boost to the country's small and medium enterprises (SMEs) that engage in contract manufacturing. (BS)

❖ Aurobindo Pharma Limited announced that the company has received final approvals from the US Food and Drug Administration (USFDA) to manufacture and market Esmolol Hydrochloride Injection 100 mg/10 ml. (BS)

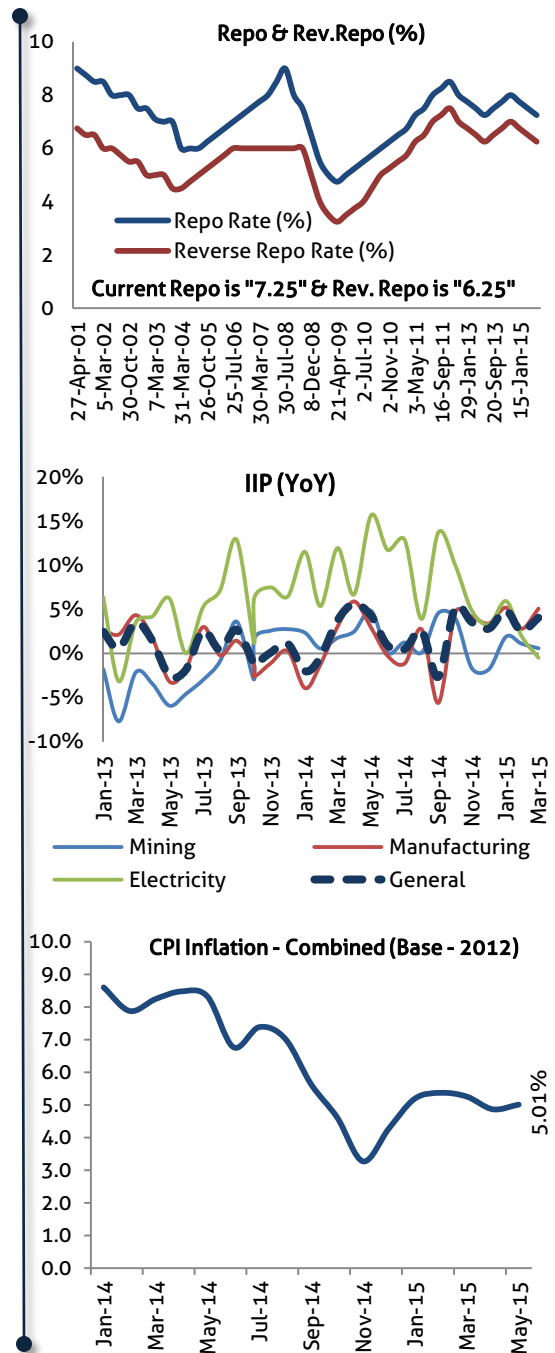
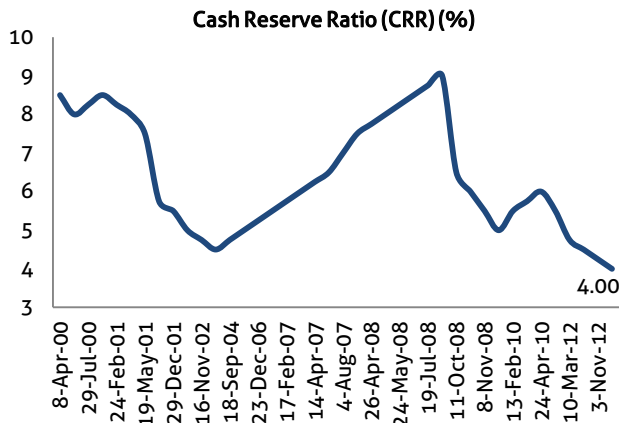
❖ Reliance Jio Infocomm, which says it will roll out 4G services across 80% of its licensing areas towards end of 2015, is in talks with 28 mobile and tablet manufacturers including Apple, Samsung and Micromax to sell self-branded compatible devices. (BS)

❖ Plywood manufacturers in the organised sector expect the rollout of the goods and services tax (GST) to boost their sales in a market dominated by the unorganised sector. In the Rs 25,000-crore Indian plywood market, the unorganised sector has a market share of 60-65%. (BS)

❖ Bharti Enterprises' real estate firm Bharti Realty said it has tied up with Eros Group to develop a housing project at Surajkund. (BS)

❖ Persistent Systems' first quarter net profit was down 2.3% year-on-year and US dollar revenue dropped 1.8% sequentially. The company said the numbers are a reflection of the churn its customers are witnessing due to technology shift. (BS)

❖ Bharti Airtel said it has selected Swedish telecom gear maker Ericsson as its supplier for deployment of a new LTE network in African nation Gabon. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
27-Jul-15	KEI Industries Limited	THADHANI INVESTMENT PVT LTD	SELL	1400000	102.0
27-Jul-15	Sunil Hitech Engr Ltd	SURYAVANSHI COMMOTRADE PVT LTD	BUY	110000	326.7
27-Jul-15	Digjam Limited	VAISHALI PRAGNESH PANDYA	SELL	1135850	10.4
27-Jul-15	IZMO Limited	AJAY DESAI (HUF)	SELL	89504	74.5
27-Jul-15	Prithvi Information Solut	CHENNADI ANNAPURNA	SELL	93000	1.4

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
27-Jul-15	AMULEAS	GAJANAN ENTERPRISES	B	53,884	148.4
27-Jul-15	SIMMOND	CLOVER TECHNOLOGIES PRIVATE LIMITED	S	62,171	85.5
27-Jul-15	WAGEND	UNO INFRATECH PRIVATE LIMITED	S	250,000	12.0
27-Jul-15	PUNEETRE	DEVJYOT TRADE AND INVESTMENT PRIVATE LIMITED	S	65,534	41.9
27-Jul-15	PELTD	SURESHBHAI H BHATT	B	45,000	60.7

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
501425	BBTC	28-Jul-15	Dividend - Rs. - 1.0000	-
500645	DEEPAKFERT	28-Jul-15	Dividend - Rs. - 4.0000	-
500068	DISA	28-Jul-15	Dividend - Rs. - 2.5000	-
531162	EMAMILTD	28-Jul-15	Final Dividend - Rs. - 3.0000	-
508486	HAWKINCOOK	28-Jul-15	Dividend - Rs. - 45.0000	-
506919	MAKERSL	28-Jul-15	Dividend - Rs. - 1.0000	-
533152	MBLINFRA	28-Jul-15	Bonus issue 1:1	29-Jul-15
509077	NUCENTFI	28-Jul-15	Dividend - Rs. - 1.1000	-
500302	PEL	28-Jul-15	Dividend - Rs. - 20.0000	-
523025	SAFARIND	28-Jul-15	Dividend - Rs. - 1.0000	-
501301	TATAINVEST	28-Jul-15	Dividend - Rs. - 17.0000	-
524200	VINATIORGA	28-Jul-15	Dividend - Rs. - 3.5000	-
500031	BAJAJELEC	29-Jul-15	Dividend - Rs. - 1.5000	-
534804	CARERATING	29-Jul-15	Interim Dividend - Rs. - 6.0000	30-Jul-15
533146	DLINKINDIA	29-Jul-15	Dividend - Rs. - 0.7000	-
538788	GILADAFINS	29-Jul-15	Interim Dividend - Rs. - 0.5000	30-Jul-15
522205	PRAJIND	29-Jul-15	Dividend - Rs. - 1.6200	-
500260	RAMCOCEM	29-Jul-15	Dividend - Rs. - 1.5000	-
500674	SANOFI	29-Jul-15	Interim Dividend - Rs. - 18.0000	30-Jul-15
503229	SIMPLXREA	29-Jul-15	Dividend - Rs. - 1.0000	-
506222	STYABS	29-Jul-15	Dividend - Rs. - 4.0000	-
506685	ULTRAMAR	29-Jul-15	Dividend - Rs. - 3.0000	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
27-Jul-15	GBP	CBI Industrial Trends Orders (Jul)		-4	-7
27-Jul-15	USD	Durable Goods Orders (MoM) (Jun)		3.00%	-2.20%
27-Jul-15	USD	Dallas Fed Mfg Business Index (Jul)		-3.5	-7
28-Jul-15	GBP	GDP (YoY) (Q2)		2.60%	2.90%
28-Jul-15	USD	S&P/CS HPI Composite - 20 n.s.a. (YoY) (May)		5.60%	4.90%
28-Jul-15	USD	Services PMI (Jul)		55	54.8
28-Jul-15	USD	CB Consumer Confidence (Jul)		100	101.4
28-Jul-15	USD	Richmond Manufacturing Index (Jul)		6	6
29-Jul-15	JPY	Retail Sales (YoY) (Jun)		0.50%	3.00%
29-Jul-15	GBP	BoE Consumer Credit (Jun)		1.100B	1.001B
29-Jul-15	GBP	Mortgage Approvals (Jun)		66.00K	64.43K
29-Jul-15	GBP	CBI Distributive Trades Survey (Jul)		30	29
29-Jul-15	USD	MBA 30-Year Mortgage Rate			4.23%
29-Jul-15	USD	Pending Home Sales (MoM) (Jun)		1.00%	0.90%
29-Jul-15	USD	Fed Interest Rate Decision		0.25%	0.25%
30-Jul-15	JPY	Industrial Production (MoM) (Jun)		0.30%	-2.10%
30-Jul-15	GBP	Nationwide HPI (MoM)		0.20%	-0.20%
30-Jul-15	EUR	Business Climate (Jul)		0.2	0.1
30-Jul-15	EUR	Consumer Confidence (Jul)		-7	-5.6
30-Jul-15	EUR	Industrial Sentiment (Jul)		-3	-3.4
30-Jul-15	USD	Continuing Jobless Claims		2,212K	2,207K
30-Jul-15	USD	GDP (QoQ) (Q2)		2.60%	-0.20%
30-Jul-15	USD	Initial Jobless Claims		270K	255K
31-Jul-15	GBP	GfK Consumer Confidence (Jul)		5	7
31-Jul-15	JPY	Household Spending (YoY) (Jun)		1.70%	4.80%
31-Jul-15	JPY	National CPI (YoY) (Jun)		0.30%	0.50%
31-Jul-15	JPY	Tokyo CPI (YoY) (Jul)		0.20%	0.30%
31-Jul-15	JPY	Unemployment Rate (Jun)		3.30%	3.30%
31-Jul-15	JPY	Construction Orders (YoY) (Jun)			-7.40%
31-Jul-15	JPY	Housing Starts (YoY) (Jun)		3.00%	5.80%
31-Jul-15	EUR	CPI (YoY) (Jul)		0.20%	0.20%
31-Jul-15	EUR	Unemployment Rate (Jun)		11.10%	11.10%
31-Jul-15	USD	Employment Cost Index (QoQ) (Q2)		0.60%	0.70%
31-Jul-15	USD	Chicago PMI (Jul)		50.5	49.4
31-Jul-15	USD	Michigan Consumer Sentiment (Jul)		94	93.3

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous

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