

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	6145	(0.32)	CNX IT	8813	1.51
Sensex	20684	(0.20)	BANK NIFTY	10897	(0.05)
DowJones	15570	0.39	S&P CNX 500	4693	(0.42)
Nasdaq	3943	0.37	CNX FMCG	17724	(0.92)
Hangseng	22698	(0.60)	CNX REALTY	170	(2.33)
Shanghai	2133	(1.45)	CNX AUTO	5039	(1.09)
Nikkei	14088	(2.75)	CNX ENERGY	7880	(0.16)
Strait Times	3205	(0.39)	CNX PHARMA	7473	(0.92)
Kospi	2034	(0.60)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	8347	(0.80)	Advances	1022	390
FTSE	6721	0.12	Declines	1420	780
CAC	4272	(0.08)	Unchanged	160	51
DAX	8986	0.06	Total	2602	1221

Nifty Gainers		
Company	Price(Rs)	Chg(%)
TCS	2065.00	2.80
HCLTECH	1080.80	2.48
WIPRO	482.00	2.37
NTPC	145.50	1.54
SSLT	201.45	1.33

Nifty Losers		
Company	Price(Rs)	Chg(%)
HINDALCO	108.90	(4.93)
DLF	151.60	(4.83)
NMDC	134.80	(3.68)
CAIRN	313.25	(3.53)
TATASTEEL	321.85	(3.10)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
Riddhi Siddhi-\$	3.00	0.34	9
Prestige Estates	10.54	1.36	8
KSK Energy	77.02	10.25	8
Persistent Sys	2.17	0.52	4
Dish TV India	37.13	9.25	4

Indian Forex	Closing	Chg	% Chg
USD/INR	61.625	0.215	0.35
GBP/INR	99.937	0.409	0.41
EUR/INR	85.135	0.320	0.38
JPY/INR	63.480	0.490	0.78

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	31640	(20)
Silver (Rs/1kg)	49483	(549)

Commodities	Price	% Chg.
Crude (US\$/BBL)	97.8	0.61
Brent (US\$/BBL)	106.9	(0.17)
Gold (US/oz)	1352.5	0.59
Silver (US\$/oz)	22.6	(0.13)
Copper (US\$/MT)	7126.0	(0.47)
Alum (US\$/MT)	1807.0	0.28
Zinc(US\$/MT)	1894.5	(0.05)

ADR	Cl. Values	% Chg.
ICICI Bank	35.00	(0.03)
HDFC Bank	35.08	(0.07)
Infosys	54.06	(0.16)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	39.30	0.02
Wipro	11.11	0.09
Tata Motors	30.83	0.18

## Market Sensor

US market finished higher on Friday after better-than-expected quarterly earning drew applause on Wall Street, while ongoing expectations for the Federal Reserve to keep policy loose into 2014 bolstered share prices as well. Dow Jones Industrial Average was up 0.39% or 61.07 points at 15570.28. Nasdaq Composite was up 0.37% or 14.40 points at 3943.36. Standard & Poor's 500 was up 0.44% or 7.70 points at 1759.77.

Indian market ended yet another profit booking trading session to end the previous trading session on a negative note as investors turned cautious ahead of the RBI policy meet scheduled this week on 29<sup>th</sup> October. Considering the persistent inflationary pressure RBI might go for rate hike by 25 bps and a further reduction in MSF rate is expected. Nifty ended the previous trading session with a decline of 0.32% or 19.45 points at 6144.90. On Friday's trading session, FII's bought net Rs.626.99 Cr in cash market and sold net Rs 1080.75 in derivative segment. Whereas, DII sold net Rs.497.95 Cr in cash segment.

**Coming to today's trade Nifty might remain volatile with crucial intraday support seen at 6110 followed by 6070 while resistance exists at 6195 followed by 6250.**

## Global News

❖ Retail sales probably stalled in September as Americans shied away from auto showrooms, indicating the economy was cooling ahead of the partial federal shutdown, economists said before reports this week.

❖ Chinese Politburo member Yu Zhengsheng said reforms to be discussed at a Communist Party meeting next month will be unprecedented, adding to signs that leaders are resolved to spur far-reaching policy changes.

❖ When HSBC Holdings Plc's economists from around the world recently pooled their forecasts, virtually all had a similar source of growth in mind for the region they monitored: exports.

## Economic News

❖ Indian speciality chemicals market has the potential to reach \$60-70 billion by 2020 from the present value of \$23 billion, a report said. (BS)

❖ The National Company Law Tribunal (NCLT), which would replace the Company Law Board, is likely to be operational by April next year, with the principal bench based in the national capital. (BS)

❖ Mines Ministry has defended the move of not giving further extension to Justice M B Shah Commission which probed illegal mining of iron ore and manganese in various states, saying it was a Cabinet decision and the one-man panel was informed well in advance. (BS)

❖ India has imposed anti-dumping duty of up to \$0.36 a kg on import of a chemical, used in manufacture pharmaceuticals and fragrance products, from EU, US and Korea to protect domestic players from cheap shipments. (BS)

❖ About 30% of total textile factories across India were non-operational as of 2010-11 which led to massive job losses in the sector, a study by industry body Assocham has found. (BS)

❖ Keen to push insurance sector reforms, the UPA government is contemplating a proposal under which the FDI cap in insurance sector would be raised from 26% to 49% without commensurate increase in voting rights. (BS)

❖ With suppliers raising concerns over certain aspects of the Nuclear Liability Act, the Department of Atomic Energy has decided to look into these worries to weed out "unnecessary liability". (BS)

❖ Foreign Direct Investment (FDI) into India declined to 8-month low of \$1.4 billion in August, down 38% year-on-year. (BS)

❖ The Cabinet Committee on Economic Affairs may this week take up Power Ministry's proposal of follow-on public offer of state-run Power Grid Corporation, which is expected to mop up close to Rs 8,000 crore. (BS)

❖ Uttar Pradesh attracted Rs.9,608 crore as investment in its industrial sector in the past financial year 2012-13, officials said Saturday. (BS)

❖ In a leap to provide connectivity, the IAF launched its own stand-alone Rs 300 crore cellular network through which secure video calling and other information exchange facilities will be provided to over 1.7 lakh personnel of the force. (BS)

## Domestic News

❖ Japanese electronic major Sony is targeting sales of Rs 3,500 crore in India this financial year from its Xperia range of smartphones. (BS)

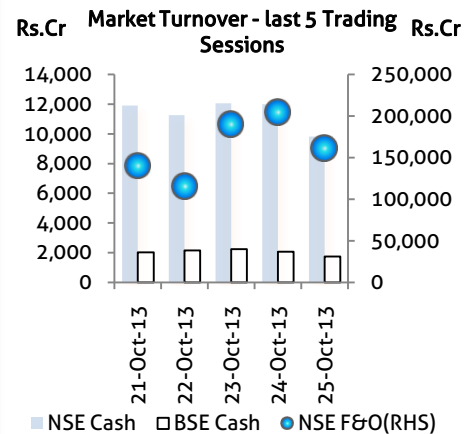
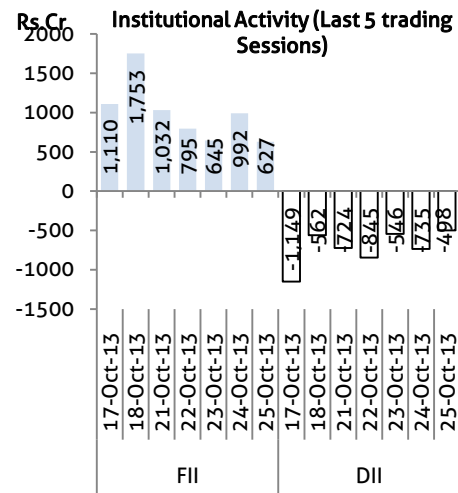
❖ The incessant rains lashing Andhra Pradesh for the past five days have impacted the production of Rashtriya Ispat Nigam Limited (RINL), the corporate entity of Vizag Steel, by 60-70% as raw material supplies were hit, according to official sources. (BS)

❖ Airtel Digital TV, the DTH service arm of telecom operator Bharti Airtel, has launched an all new standard definition (SD) set-top box that enable recording of television content. The SD set-top box will allow customers to enjoy recording by just plugging-in an external storage device (BS)

❖ At a time when power companies are facing stress in managing debt, state-owned Damodar Valley Corporation has successfully swapped a Rs 2633-crore high cost existing project loan with SBI to save on interest cost. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.3802	0.0001	0.01
GBP-USD	1.6165	(0.0037)	(0.23)
USD-JPY	97.42	0.14	0.14

Bond Markets	Closing	Chg
10-yr bond	8.81	-1.0 bps
Interbank call	8.96	0.0 bps



## Domestic News (Cont...)

❖ India Infrastructure Finance Co has said its British arm, which had already sought a two-year extension for its \$5-billion line of credit from RBI, is planning to seek nod for one year more on account of higher loan commitments from power sector clients and others. (BS)

❖ IT firm R Systems International reported over three-fold increase in consolidated net profit at Rs 18.05 crore for its third quarter ended September 30. (BS)

❖ Reliance Games is betting big on action-based games for mobiles and tablets. With the success of its Real Steel game series, the company is planning to create a studio for action-based games, said Reliance Entertainment Digital CEO Manish Agarwa (BS)

❖ After buying out global private equity major DE Shaw's stake, the Maheshwari family has further consolidated its holding in Amar Ujala Publications by acquiring 14% stake from Ashok Agarwal and family. (BS)

❖ In a first of its kind of disinvestment, state-run hydro power producer NHPC would buy back government shares which would yield the exchequer about Rs 2,000 crore. (BS)

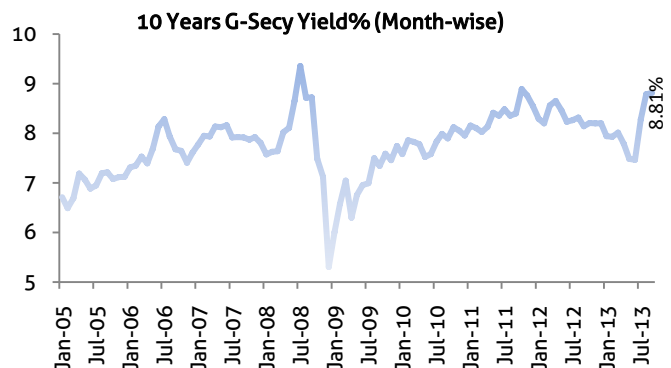
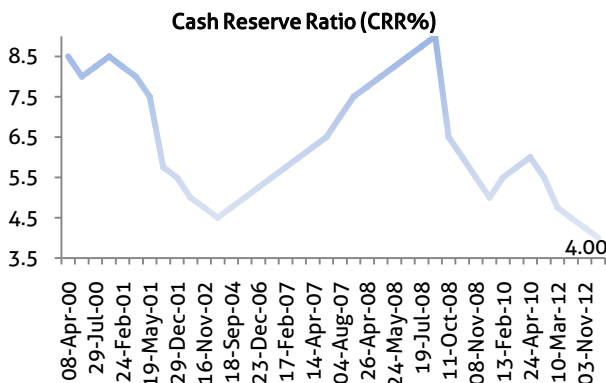
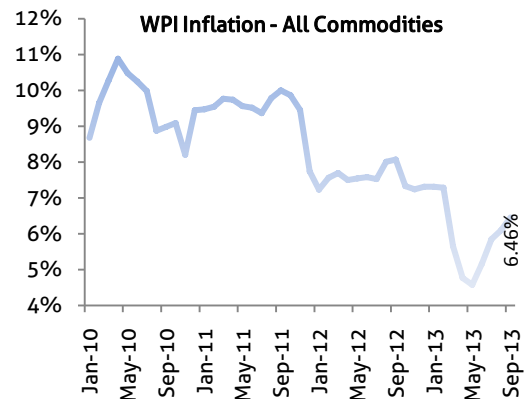
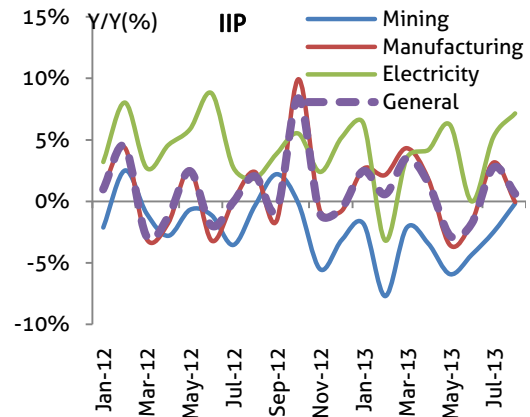
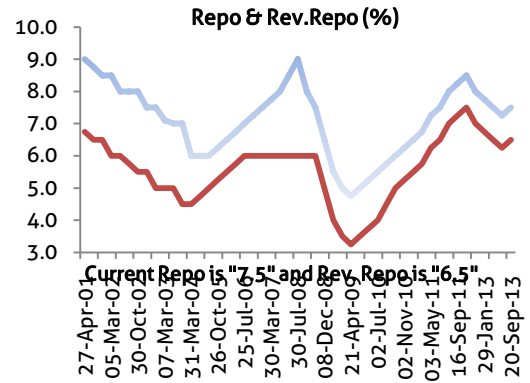
❖ Cement firms had a bad run during the July-September quarter, with major producers reporting huge dips in net profit as selling prices fell and freight costs rose. (BS)

❖ Country's top four IT companies -- TCS, Infosys, Wipro and HCL Technologies -- have seen their combined cash chest swell to a whopping \$9 billion (Rs 56,000 crore) as their businesses continue to generate profitable growth despite turbulent macroeconomic scenario. (BS)

❖ In its two-year journey since ideation, a dozen data-collecting vehicles of Wonobo.Com have traversed as much as 150,000 km scanning the major cities in the country to launch an indigenous 'street view' service on the lines of Google's offering. (BS)

❖ Leading private sector insurer Reliance Life Insurance says it is focussing on traditional products and agent productivity to boost insurance penetration in the country. (BS)

❖ Vodafone India, the nation's second-biggest telecom firm, will continue to invest a minimum of Rs 4,000 crore to Rs 6,000 crore every year to expand operations in the world's second-biggest mobile phone market, its chief executive has said. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25-Oct-13	eClerx Services Limited	HDFC MUTUAL FUND	SELL	200000	948.34
25-Oct-13	Financial Technologies (I	MAHALAXMI CRESEC PRIVATE LIMITED	SELL	237281	152.05
25-Oct-13	A2Z Mnt. & Eng. Serv Ltd	AJAY ASSET MANAGEMENT PRIVATE LIMITED	BUY	529017	11.74
25-Oct-13	A2Z Mnt. & Eng. Serv Ltd	AJAY ASSET MANAGEMENT PRIVATE LIMITED	SELL	529018	11.72
25-Oct-13	Sudar Industries Limited	AKG FINVEST LTD	BUY	195877	19.28

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
25/10/2013	KSK Energy	LB MAURITIUS II LTD	S	7,532,942	56.25
25/10/2013	Riddhi Siddhi-₹	AADARSH UTKARSH SHAH	B	300,000	225
25/10/2013	Venkys India	VENKATESHWARA HATCHERIES PRIVATE LIMITED	B	90,000	488.5
25/10/2013	S Kumar Nation	HRIDAYNATH CONSULTANCY PRIVATE LIMITED	B	2,487,220	5.25
25/10/2013	S Kumar Nation	J P MORGAN SEC LTD A/C COPTHALL MAURITIUS INVEST LTD	S	2,000,000	5.25

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
500188	Hindustan Zinc	28-Oct-13	Interim Dividend - Rs.1.60	29-Oct-13
533121	THINKSOFT	28-Oct-13	Interim Dividend - Rs.5.00	29-Oct-13
532622	Gateway Distr	29-Oct-13	Interim Dividend - Rs.4.00	30-Oct-13
532175	Infotech Enter	29-Oct-13	Interim Dividend - Rs.2.00	30-Oct-13
517447	RS Software	29-Oct-13	Interim Dividend - Rs.2.50	30-Oct-13
513729	ARO Granite-₹	30-Oct-13	BONUS 1:2	31-Oct-13
532777	Info Edge India	30-Oct-13	Interim Dividend - Rs.1.00	31-Oct-13
500355	Rallis India	30-Oct-13	Interim Dividend - Rs.1.00	31-Oct-13
532343	TVS Motor	30-Oct-13	Interim Dividend - Rs.0.65	31-Oct-13
500150	Foseco India	31-Oct-13	3rd Interim Dividend - Rs.4.50	01-Nov-13
532345	Gati	31-Oct-13	Final Dividend - Rs.0.60	-
507815	Gillette India	31-Oct-13	Dividend - Rs.15.00	-
524226	Gujarat Ambuj Ex	31-Oct-13	Interim Dividend - Rs.-	01-Nov-13
500696	Hindustan Unilever	31-Oct-13	Interim Dividend - Rs.-	01-Nov-13
535789	IBUL HSG FIN	31-Oct-13	2nd Interim Dividend - Rs.7.00	02-Nov-13
500106	IFCI	31-Oct-13	Dividend - Rs.1.00	-
532832	Indiabulls Real Est	31-Oct-13	2nd Interim Dividend - Rs.1.00	01-Nov-13
532960	Indiabulls Sec	31-Oct-13	2nd Interim Dividend - Rs.1.00	01-Nov-13
524494	IPCA Lab	31-Oct-13	Interim Dividend - Rs.2.50	01-Nov-13
532889	KPR Mill	31-Oct-13	Interim Dividend - Rs.4.00	01-Nov-13
532892	Motilal Oswal	31-Oct-13	Interim Dividend - Rs.-	01-Nov-13

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
28-Oct-13	GBP	CBI Distributive Trades Survey		33	34
28-Oct-13	USD	Industrial Production (MoM)		0.40%	0.40%
28-Oct-13	USD	Pending Home Sales (MoM)		0.10%	-1.60%
28-Oct-13	USD	Dallas Fed Mfg Business Index			12.8
29-Oct-13	GBP	BoE Consumer Credit		0.70B	0.60B
29-Oct-13	USD	PPI (MoM)		0.20%	0.30%
29-Oct-13	USD	Retail Sales (MoM)		0.10%	0.20%
29-Oct-13	USD	Business Inventories (MoM)		0.30%	0.40%
29-Oct-13	USD	CB Consumer Confidence		75.3	79.7
30-Oct-13	JPY	Industrial Production (MoM)		1.80%	-0.90%
30-Oct-13	EUR	Consumer Confidence		-15	-14.9
30-Oct-13	EUR	Industrial Sentiment		-7	-6.7
30-Oct-13	USD	ADP Nonfarm Employment Change		150K	166K
30-Oct-13	USD	CPI (MoM)		0.20%	0.10%
30-Oct-13	USD	GDP (QoQ)		2.00%	2.50%
31-Oct-13	JPY	Manufacturing PMI			52.5
31-Oct-13	GBP	GfK Consumer Confidence		-8	-10
31-Oct-13	GBP	Nationwide HPI (MoM)		0.70%	0.90%
31-Oct-13	EUR	Unemployment Rate		12.00%	12.00%
31-Oct-13	USD	Core PCE Price Index (MoM)		0.20%	0.20%
31-Oct-13	USD	Employment Cost Index (QoQ)			0.50%
31-Oct-13	USD	Initial Jobless Claims		340K	350K
31-Oct-13	USD	Personal Spending (MoM)		0.20%	0.30%
31-Oct-13	USD	Chicago PMI		55	55.7
01-Nov-13	CNY	Chinese Manufacturing PMI			51.1
01-Nov-13	GBP	Manufacturing PMI		56.2	56.7
01-Nov-13	USD	Construction Spending (MoM)			
01-Nov-13	USD	ISM Manufacturing Index		55	56.2

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
29-Oct-13	INR	Indian Interest Rate Decision		7.50%	7.50%
30-Oct-13	INR	Indian M3 Money Supply			13.20%
01-Nov-13	INR	HSBC Markit Manufacturing PMI			49.6
01-Nov-13	INR	Indian Bank Loan Growth			17.70%

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