

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8240	(0.55)	CNX IT	11094	0.38
Sensex	27226	(0.62)	BANK NIFTY	18303	0.31
DowJones	18036	(0.41)	S&P CNX 500	6782	(0.19)
Nasdaq	5024	(0.63)	CNX FMCG	19730	(1.61)
Hangseng	28056	(1.21)	CNX REALTY	3506	(0.33)
Shanghai	4462	(0.33)	CNX AUTO	8279	(0.44)
Nikkei	19678	(1.90)	CNX ENERGY	8302	(0.94)
Strait Times	3469	(0.52)	CNX PHARMA	12043	0.49
Kospi	2125	(0.84)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	9842	(0.12)	Advances	1524	663
FTSE	6946	(1.20)	Declines	1182	472
CAC	5039	(2.59)	Unchanged	105	34
DAX	11433	(3.21)	Total	2811	1169

Nifty Gainers		
Company	Price(Rs)	Chg(%)
AXISBANK	558.55	4.40
AMBUJACEM	238.95	3.64
HCLTECH	887.00	1.90
WIPRO	541.75	1.78
SUNPHARMA	939.80	1.62

Nifty Losers		
Company	Price(Rs)	Chg(%)
IDEA	179.60	(6.39)
BHARTIARTL	385.30	(3.86)
ITC	327.40	(3.01)
HDFC	1197.65	(2.49)
ACC	1480.15	(2.27)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
EIDPARRY	9.17	0.2	47
OBEROIRLTY	8.12	0.2	35
FULFORD	0.46	0.0	22
WELSPUNIND	3.66	0.4	9
INTLCONV	19.70	3.0	7

Indian Forex	Closing	Chg	% Chg
USD/INR	63.203	(0.128)	(0.20)
GBP/INR	97.010	0.494	0.51
EUR/INR	69.340	0.411	0.60
JPY/INR	53.080	(0.120)	(0.23)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26995	70
Silver (Rs/1kg)	37222	159

Commodities	Price	% Chg.
Crude (US\$/BBL)	58.7	3.17
Brent (US\$/BBL)	65.6	0.17
Gold (US/oz)	1203.5	(0.52)
Silver (US\$/oz)	16.5	(0.18)
Copper (US\$/MT)	6103.0	0.21
Alum (US\$/MT)	1868.0	1.20
Zinc(US\$/MT)	2288.0	(0.61)

ADR	Cl. Values	% Chg.
ICICI Bank	10.94	0.01
HDFC Bank	57.16	(0.04)
Infosys	31.15	(0.13)
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	53.47	(0.66)
Wipro	11.66	0.05
Tata Motors	42.24	(0.64)

## Market Sensor

US market closed lower on Wednesday as investors remained on edge amid earnings as the Federal Reserve reaffirmed its data-dependent stance following a weak first-quarter GDP report. Dow Jones Industrial Average on Tuesday was down 0.41% or 74.61 points at 18035.53. Nasdaq Composite was down 0.63% or 31.78 points at 5023.65. Standard & Poor's 500 was down 0.37% or 7.91 points at 2106.85.

Indian equity market traded volatile and ended in red. Concerns of higher oil price, USDINR appreciation, continued FII's selling and forecast of below normal monsoon had been taking a toll in the market. Traders remained cautious as they are eyeing the outcome from the two day Fed meet and the April derivative expiry. Nifty ended the previous day with a decline 0.55% or 45.85 at 8239.75. On Wednesday's trading session, FIIs sold Rs.718.31 Cr in cash market and sold net Rs.1111.56 in derivative segment. Whereas, DII bought net Rs.912.46 Cr in cash segment.

## Global News

❖ U.S. economic growth braked more sharply than expected in the first quarter as harsh weather dampened consumer spending and energy companies struggling with low prices slashed spending, but there are signs activity is picking up. (CNBC)

❖ Spring is bringing more U.S. home buyers into the market. Signed contracts to buy existing homes rose 1.1 percent in March from an upwardly revised February reading, according to a monthly index from the National Association of Realtors. (CNBC)

❖ Ratings agency Moody's on Thursday cut Greece's credit rating deeper into junk territory due to uncertainty over whether the indebted country will be able to reach a deal with its international lenders in time to meet upcoming debt repayments. (Reuters)

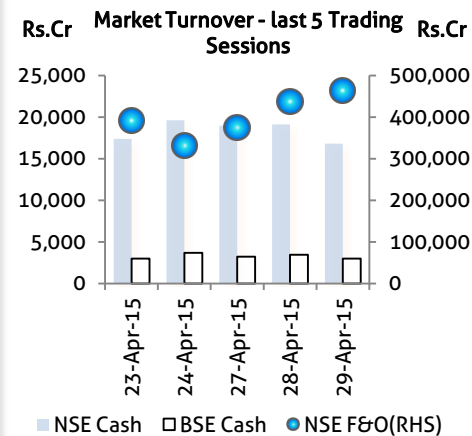
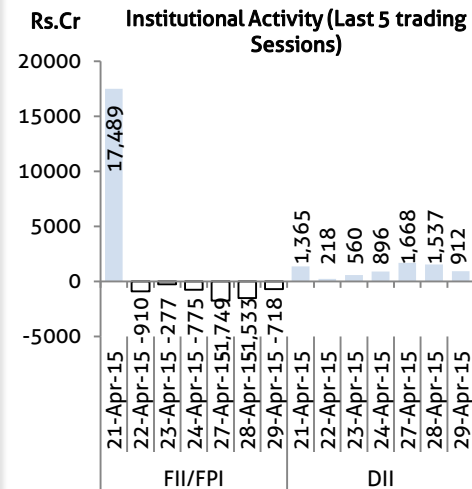
❖ British consumer morale held steady at its highest level in more than 12 years in April, mixed news for Prime Minister David Cameron before the May 7 national election, according to researchers GfK. (Reuters)

## Economic News

- ❖ The Union Cabinet gave its nod to NDA government's flagship 100 smart cities project and the new urban renewal mission with a total outlay of about Rs one lakh crore. (BS)
- ❖ As many as 224 central sector infrastructure projects in sectors like road, rail and power were showing cost overrun of over Rs 2 lakh crore till December-end, Parliament was informed. (BS)
- ❖ The Union Cabinet gave its approval for the introduction of the Merchant Shipping (Amendment) Bill, 2015, in line with a global convention, to protect environment and human health from ballast water and sediments used in ships. (BS)
- ❖ The government raised the import duty on sugar from 25% to 30% and imposed other restrictions on inbound shipments to mitigate the woes of the sugar industry. (BS)
- ❖ The Union cabinet chaired by Prime Minister Narendra Modi approved a new policy on testing requirement for discoveries in oil and gas blocks awarded under the New Exploration and Licensing Policy (NELP). (BS)
- ❖ Weak oil and commodity prices are offsetting concerns at India's central bank over the impact of a spike in gold imports on the broader economy, officials say, even as the industry forecasts another three months of strong buying. (BS)
- ❖ To check the call drop menace, telecom regulator TRAI will soon put in place a new set of 'service quality benchmarks', non-adherence to which may lead to stricter penal action against the mobile operators. (BS)
- ❖ The government is looking at the option of upgrading existing power plants into larger capacity Ultra Mega Power Projects (UMPPs) using clean technology and to offer them in plug and play mode, Power Minister Piyush Goyal said. (BS)
- ❖ Congress Vice-President Rahul Gandhi's visit to Punjab to meet distressed farmers, his proposed padyatra in the suicide-prone Amravati district of Maharashtra's Vidarbha region and his consistent bid to project the National Democratic Alliance (NDA) as pro-industry and anti-farmer, appear to have rattled the Narendra Modi-led government at the Centre. (BS)
- ❖ To improve the ease of doing business, the Cabinet approved amendments to the companies law that do away with a mandatory declaration by a firm before commencing business. (BS)
- ❖ The government's agri-financing body National Co-operative Development Corporation said it disbursed over Rs 5,700 crore to cooperative societies during the last financial year. (BS)
- ❖ The Union Cabinet on Wednesday approved the proposal to set up 100 smart cities across the country. In addition to this, old housing projects initiated by the previous government have also been cleared. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.1114	(0.0014)	(0.13)
GBP-USD	1.5427	(0.0011)	(0.07)
USD-JPY	118.82	(0.20)	(0.17)

Bond Markets	Closing	Chg
10-yr bond	7.82	3.40 bps
Interbank call	7.51	6.66 bps



## Domestic News

- ❖ Federal Bank posted a 1.16% rise in net profit for fourth quarter ended March 31, 2015. The bank posted profit of Rs 280.5 crore for Q4 compared to Rs 277.2 crore in same quarter previous fiscal. (BS)
- ❖ Axis Bank on Wednesday reported an 18.36% growth in net profit for the fourth quarter ended March 31, 2015 on account of higher net interest income (NII). The bank had net profit of Rs 2180.6 crore for Q4 of FY15 compared to Rs 1842.3 crore posted in Q4 FY14. (BS)

## Domestic News (Cont...)

❖ TVS Motor has reported a profit of Rs 90.52 crore during the quarter ended March 31, 2015 as compared to Rs 52.12 crore, during the same period last year, an increase of around 74%. (BS)

❖ Hyderabad-based MedPlus, one of India's leading pharmacy retail chain, launched its online service - 'Click, Pick & Save' in Chennai. (BS)

❖ Hyderabad-based MedPlus, one of India's leading pharmacy retail chain, is planning to raise around \$75 million from private equity firms in the next six months. The proceeds will be used to fund company's plan to strengthen its back-end infrastructure. (BS)

❖ Every month, Michael N Jensen, CEO of Carlsberg India, randomly picks up an outlet anywhere across 140 cities, to spend a full day there just to see and interact with the real consumers, outlet owners and the people who work there. (BS)

❖ Housing Development Finance Corporation's reported an 8% increase in standalone net profit at Rs 1,862 crore for the quarter ending March 2015. It was Rs 1,723 crore in March 2014. (BS)

❖ Ambuja Cements reported a plunge of 38.9 per cent in its standalone net profit at Rs 317.69 crore for the March quarter due to muted demand and decline in sales. (BS)

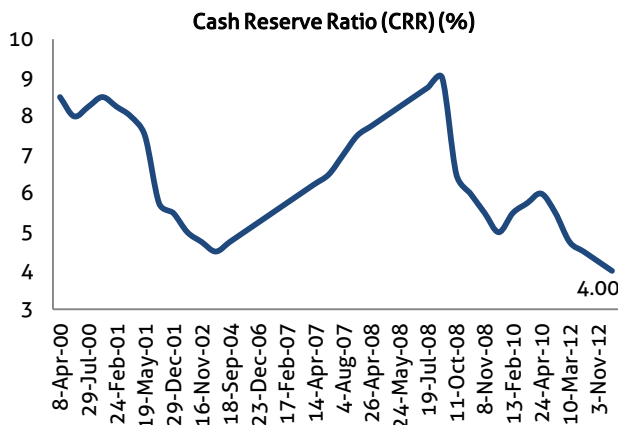
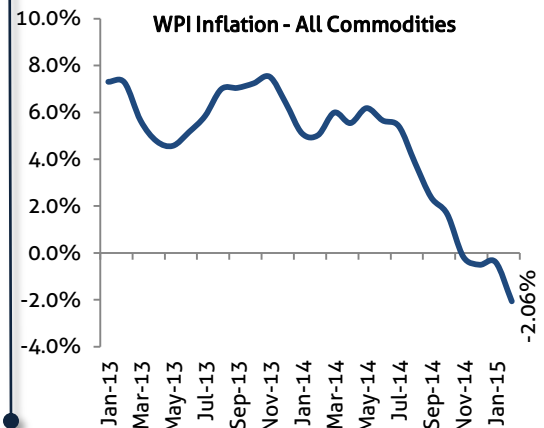
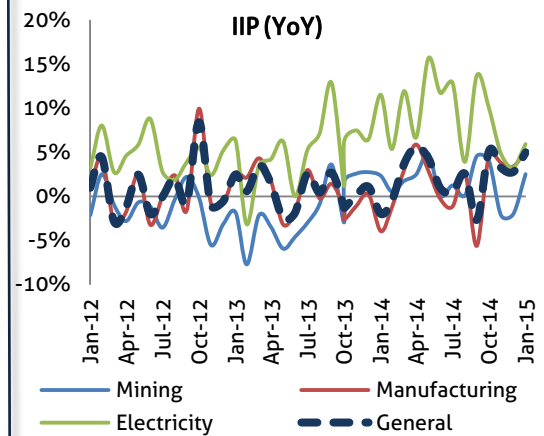
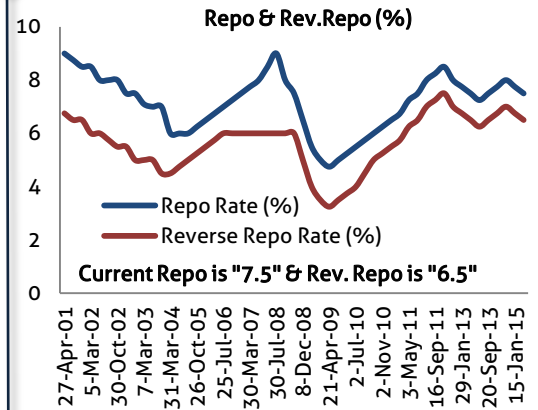
❖ The Cabinet Committee on Economic Affairs (CCEA) approved a policy to allow development of a dozen contentious natural gas discoveries of Reliance Industries and ONGC worth Rs one lakh crore at current prices. (BS)

❖ Sterling Holiday Resorts India Ltd is planning to invest around Rs 100 crore in 2015-16 to set up new resorts. (BS)

❖ The Lohia Group is expanding its electric vehicle portfolio with plans to launch two new two-wheelers and a three-wheeler to cash in on the government's FAME India scheme. (BS)

❖ Even as the country faces a shortage of 19 million houses, around 10.2 million completed units are lying vacant, which can be absorbed under rental housing programme for weaker sections, says property consultant CBRE. (BS)

❖ Auto components maker Motherson Sumi Systems Ltd (MSSL) has received biggest ever order from Germany's Daimler, worth Rs 15,400 crore, to supply external and internal systems for Mercedes-Benz vehicles. (BS)



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Apr-15	Gulf Oil Lub. Ind. Ltd.	GULF OIL INTERNATIONAL MAURITIUS INC	BUY	1237500	465.0
29-Apr-15	GVK Power & Infrastructur	VERTEX PROJECTS LIMITED	BUY	36250000	8.5
29-Apr-15	Mangalore Chemicals & Fer	SCM SOILFERT LIMITED	SELL	932292	87.3
29-Apr-15	Tata Sponge Iron Ltd.	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	BUY	109915	596.9
29-Apr-15	Vadilal Industries Ltd	N.K. SECURITIES	SELL	43574	493.6

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
29-Apr-15	STERLINH	RAKESH RADHEYSHYAM JHUNJHUNWALA	S	622,447	270.0
29-Apr-15	FULFORD	VOF MASTER LTD.	B	45,000	1610.0
29-Apr-15	INTLCONV	RAJENDRA KUMAR DABRIWALA	S	1,846,000	31.7
29-Apr-15	AIFL	NNM SECURITIES PVT LTD	B	101,000	235.6
29-Apr-15	LYKALABS	MATRIMANDIR TECHNOLOGIES PRIVATE LIMITED	S	200,000	55.0

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
532129	HEXAWARE	30-Apr-15	Interim Dividend - Rs.-	-
533377	IPRU1117	30-Apr-15	Temporary Suspension	05-May-15
533379	IPRU1118P	30-Apr-15	Temporary Suspension	05-May-15
533381	IPRU1310	30-Apr-15	Temporary Suspension	05-May-15
533383	IPRU1311P	30-Apr-15	Temporary Suspension	05-May-15
533380	IPRU1694	30-Apr-15	Temporary Suspension	05-May-15
533384	IPRU1695	30-Apr-15	Temporary Suspension	05-May-15
537323	IPRU8067	30-Apr-15	Temporary Suspension	05-May-15
537324	IPRU8068	30-Apr-15	Temporary Suspension	05-May-15
535809	IPRU8120	30-Apr-15	Temporary Suspension	05-May-15
523457	LINDEINDIA	30-Apr-15	Dividend - Rs.1.50	-
532622	GDL	05-May-15	Interim Dividend - Rs.-	06-May-15
532424	GODREJCP	05-May-15	Interim Dividend - Rs.2.50	06-May-15
532733	SUNTV	05-May-15	Interim Dividend - Rs.-	06-May-15
532343	TVSMOTOR	05-May-15	2nd Interim Dividend - Rs.-	06-May-15
501270	ZCHANAIN	05-May-15	BONUS 3:1	06-May-15
500870	CASTROLIND	06-May-15	Final Dividend - Rs.4.00	-
535789	IBULHSGFIN	06-May-15	Interim Dividend - Rs.9.00	07-May-15
532960	IBVENTURES	06-May-15	Interim Dividend - Rs.1.00	07-May-15
500150	FOSECOIND	07-May-15	1st Interim Dividend - Rs.3.50	08-May-15
507488	GMBREW	08-May-15	Dividend - Rs.2.50	-
500189	HINDUJAVEN	08-May-15	Interim Dividend - Rs.15.00	11-May-15

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
27-Apr-15	GBP	CBI Industrial Trends Orders (Apr)		4	0
27-Apr-15	USD	Services PMI (Apr)		59.5	59.2
27-Apr-15	USD	Dallas Fed Mfg Business Index (Apr)		-12	-17.4
28-Apr-15	JPY	Retail Sales (YoY) (Mar)		-7.30%	-1.70%
28-Apr-15	GBP	GDP (YoY) (Q1)		2.60%	3.00%
28-Apr-15	USD	S&P/CS HPI Composite - 20 n.s.a. (YoY)		4.70%	4.60%
28-Apr-15	USD	CB Consumer Confidence (Apr)		102.5	101.3
28-Apr-15	USD	Richmond Manufacturing Index (Apr)		-2	-8
29-Apr-15	GBP	Nationwide HPI (YoY) (Apr)		4.10%	5.10%
29-Apr-15	EUR	Consumer Confidence (Apr)		-5	-3.7
29-Apr-15	USD	MBA 30-Year Mortgage Rate			3.83%
29-Apr-15	USD	GDP (QoQ) (Q1)		1.00%	2.20%
29-Apr-15	USD	Real Consumer Spending (Q1)		1.70%	4.40%
29-Apr-15	USD	Pending Home Sales (MoM) (Mar)		1.20%	3.10%
30-Apr-15	GBP	GfK Consumer Confidence (Apr)		4	4
30-Apr-15	JPY	Industrial Production (MoM) (Mar)		-2.30%	-3.10%
30-Apr-15	JPY	Interest Rate Decision		0.10%	0.10%
30-Apr-15	EUR	CPI (YoY) (Apr)		-0.10%	-0.10%
30-Apr-15	EUR	Unemployment Rate (Mar)		11.20%	11.30%
30-Apr-15	USD	Continuing Jobless Claims			2,325K
30-Apr-15	USD	Core PCE Price Index (MoM) (Mar)		0.20%	0.10%
30-Apr-15	USD	Initial Jobless Claims		297K	295K
30-Apr-15	USD	Personal Income (MoM) (Mar)		0.30%	0.40%
30-Apr-15	USD	Chicago PMI (Apr)		50	46.3
01-May-15	JPY	National CPI (YoY) (Mar)			2.20%
01-May-15	JPY	Tokyo CPI (YoY) (Apr)			2.30%
01-May-15	JPY	Unemployment Rate (Mar)		3.50%	3.50%
01-May-15	CNY	Manufacturing PMI (Apr)		50	50.1
01-May-15	GBP	Manufacturing PMI (Apr)		54.6	54.4
01-May-15	USD	ISM Manufacturing PMI (Apr)		52	51.5
01-May-15	USD	Michigan Consumer Sentiment (Apr)		96	95.9

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
29-Apr-15	INR	M3 Money Supply (2wk)			12.00%
30-Apr-15	INR	Federal Fiscal Deficit (Mar)			6,025.34B
01-May-15	INR	Bank Loan Growth (2wk)			12.60%
01-May-15	INR	Deposit Growth (2wk)			12.80%
01-May-15	INR	FX Reserves, USD			343.20B

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