

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 7791 | 0.55 | CNX IT | 10361 | (0.22) |
| Sensex | 26087 | 0.37 | BANK NIFTY | 15452 | 1.58 |
| DowJones | 16880 | (0.19) | S&P CNX 500 | 6233 | 0.53 |
| Nasdaq | 4463 | 0.45 | CNX FMCG | 18880 | 0.39 |
| Hangseng | 24751 | 0.07 | CNX REALTY | 3563 | 0.30 |
| Shanghai | 2179 | (0.12) | CNX AUTO | 6958 | 0.72 |
| Nikkei | 15689 | 0.27 | CNX ENERGY | 9564 | 0.45 |
| Strait Times | 3373 | 0.59 | CNX PHARMA | 9340 | 1.47 |
| Kospi | 2077 | (0.26) | Advances / Declines | BSE | NSE |
| Taiwan | 9340 | (1.13) | Advances | 1361 | 737 |
| FTSE | 6773 | (0.50) | Declines | 1531 | 802 |
| CAC | 4312 | (1.22) | Unchanged | 119 | 65 |
| DAX | 9594 | (0.62) | Total | 3011 | 1604 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| LUPIN | 1180.00 | 5.48 |
| BHARTIARTL | 373.30 | 5.47 |
| PNB | 981.00 | 4.38 |
| DLF | 200.70 | 3.27 |
| KOTAKBANK | 970.80 | 3.14 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| LT | 1526.10 | (7.01) |
| JINDALSTEL | 277.00 | (1.83) |
| TATAPOWER | 99.60 | (1.63) |
| TECHM | 2157.00 | (1.55) |
| MCDOWELL-N | 2363.15 | (1.44) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|--------------------|-----------------|------------------|------------------|
| Aditya Birla Nuv | 4.07 | 0.3 | 16 |
| DCMSHRIRAM | 2.95 | 0.3 | 12 |
| Lupin | 3.92 | 0.4 | 9 |
| Balkrishna Inds-\$ | 1.44 | 0.2 | 9 |
| L&T | 10.97 | 1.4 | 8 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|---------|--------|
| USD/INR | 60.149 | 0.047 | 0.08 |
| GBP/INR | 101.922 | (0.118) | (0.12) |
| EUR/INR | 80.636 | (0.103) | (0.13) |
| JPY/INR | 58.900 | (0.100) | (0.17) |

| Precious Metal | Closing | Chg (Rs.) |
|-----------------|---------|-----------|
| Gold (Rs/10gm) | 27800 | (100) |
| Silver (Rs/1kg) | 44138 | 1 |

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 99.6 | (1.29) |
| Brent (US\$/BBL) | 106.2 | (1.04) |
| Gold (US/oz) | 1296.4 | (0.37) |
| Silver (US\$/oz) | 20.6 | 0.00 |
| Copper (US\$/MT) | 7090.0 | (0.37) |
| Alum (US\$/MT) | 1982.5 | 0.43 |
| Zinc(US\$/MT) | 2358.0 | (1.26) |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 50.75 | 1.13 |
| HDFC Bank | 48.10 | 0.31 |
| Infosys | 55.64 | 0.25 |
| Sterlite Inds. | 6.22 | 0.00 |
| Dr. Deddy's Labs | 46.64 | 1.18 |
| Wipro | 11.76 | (0.05) |
| Tata Motors | 39.71 | (0.48) |

Market Sensor

US market wavered on Wednesday after a report had the economy growing more than expected in the second quarter and the Federal Reserve continued tapering asset purchases and its ultra-easy monetary policy. Dow Jones Industrial Average was down 0.19% or 31.75 points at 16880.36. Nasdaq Composite was up 0.45% or 20.20 points at 4462.90. Standard & Poor's 500 was up 0.01% or 0.12 points at 1970.07.

Indian Equity market scooped up lower levels ahead of expiry of July derivatives contracts on account of short covering. Markets started in red turned green in later half of the trade day and ended positive. Partially recovery in monsoon also had been boosting the market sentiment. Nifty ended the previous trading session with a gain of 0.55% or 42.70 points at 7791.40. On Wednesday's trading session, FII's sold net Rs.381.66 Cr in cash market and bought net Rs.495.24 in derivative segment. Whereas, DII bought net Rs.515.65 Cr in cash segment.

Coming to today's trade Nifty to remain volatile, crucial intraday support exists at 7750 followed by 7700 while resistance is seen at 7820 followed by 7860.

Global News

❖ The Federal Reserve's policy committee has tuned into Chair Janet Yellen's beat on the U.S. labor market, and it's still playing the blues. (Bloomberg)

❖ Japan's wage growth slowed in June, highlighting the risk to consumer spending as inflation squeezes household budgets in the world's third-largest economy. Average overall monthly earnings rose 0.4 percent from a year earlier to 437,362 yen. (Bloomberg)

❖ Spanish second-quarter growth beat the Bank of Spain's estimate as economists say domestic demand supported a recovery in the euro region's fourth-largest economy even as prices fell this month. The Madrid-based National Statistics Institute today said that gross domestic product rose 0.6 percent from the first quarter. (Bloomberg)

❖ The economic expansion in the second quarter picked up where it left off late last year, led by gains in consumer spending and business investment that indicate the U.S. slump at the start of 2014 was an anomaly. Gross domestic product rose at a 4 percent annualized rate from April through June. (Bloomberg)

Economic News

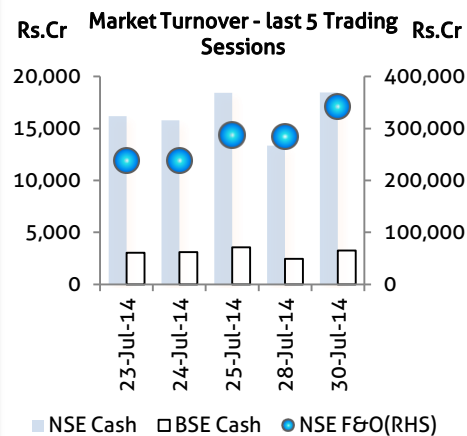
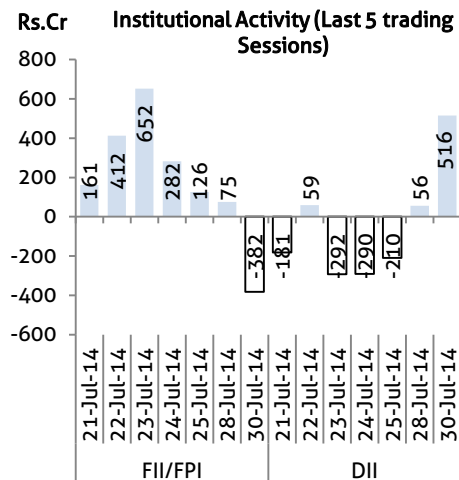
- ❖ Security market in India is expected to touch USD 1.06 billion by 2015 as an increasing number of enterprises invest in these solutions to protect their business especially in the digital world, research firm Gartner today said. (BS)
- ❖ Gujarat has recorded highest growth rate of 8.2% of per capita income (PCI) between 2004 and 2013 among high income states, a study conducted by industry body Associated Chambers of Commerce and Industry of India (ASSOCHAM) said. (BS)
- ❖ A top official of the Union Steel Ministry today underlined the need for increasing steel production in the country. (BS)
- ❖ The Finance Ministry has constituted a panel to give more teeth to the debt recovery laws to effectively deal with wilful defaulters and check bad loans which have soared to Rs 2.40 lakh crore. (BS)
- ❖ The government is planning to formulate a New Education Policy aimed at meeting the challenges posed by lack of quality, research and innovation in our educational institutions, Minister for Human Resources Development, Smriti Irani told in the Rajya Sabha today. (BS)
- ❖ A bill that paves the way for reducing procedural delays after the land is allotted for various purposes under the Karnataka Land Reforms Act, 1961 and Karnataka Land Revenue Act, 1964 was passed by the Legislative Council today. (BS)
- ❖ Allaying fears of adverse impact of deficient monsoon on the economy, National Statistical Commission Chairman Pronob Sen said the country's growth can be as high as 6.5% in the current fiscal. (BS)
- ❖ Investors pulled out nearly Rs 60,000 crore from various mutual fund schemes in June after putting in a staggering Rs 1.5 lakh crore in the preceding two months. (BS)
- ❖ The proposed hike in industrial power tariffs in Uttar Pradesh would spur migration of Small and Medium Enterprises (SMEs) to the neighbouring state of Uttarakhand, Indian Industries Association (IIA) has said. (BS)
- ❖ US Secretary of State John Kerry, on his way to India for an official visit, has pressed New Delhi to drop its opposition to global trade reforms, saying it was a test of the country's commitment to advance trade and investment liberalisation. (BS)
- ❖ Pharmaceuticals Export Promotion Council (Pharmexcil), under the Ministry of Commerce and Industry, has recommended two new ports - Krishnapatnam in Andhra Pradesh and Kattupalli in Tamil Nadu - for export and import of drugs. (BS)

Domestic News

- ❖ Anil Agarwal controlled Vedanta Resources firm Sesa Sterlite got the nod of affected locals to expand capacity of its Lanjigarh refinery from one million tonne per annum (mtpa) to six mtpa at a time when the refinery is running at reduced capacity due to absence of raw material linkage. (BS)
- ❖ Gujarat State Fertilizers & Chemicals Limited (GSFC) has commenced the production of Neem coated Urea. (BS)
- ❖ SAIL is likely to invest around Rs 1.5 lakh crore to raise its hot metal making capacity to 50 million tonnes per annum (mtpa) from 23 mtpa, planned under ongoing modernisation and expansion by 2025, the Parliament was informed today. (BS)

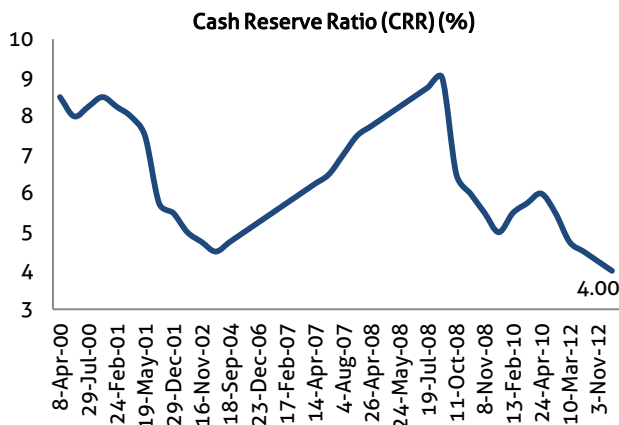
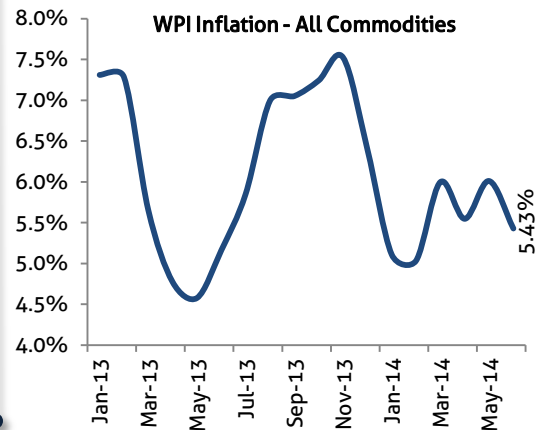
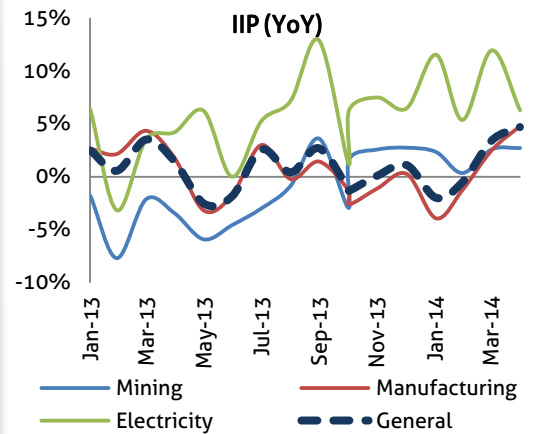
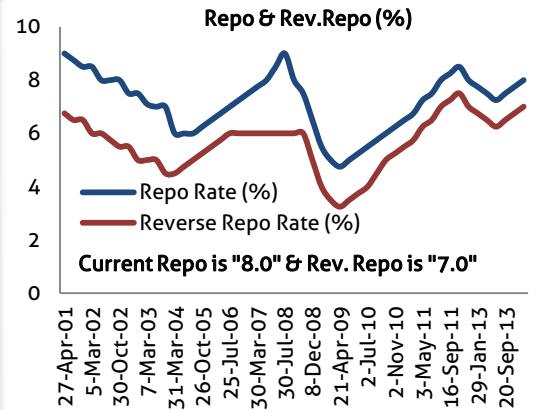
| Global Forex | Closing | Chg | % Chg |
|--------------|---------|--------|--------|
| EUR-USD | 1.3399 | 0.0002 | 0.01 |
| GBP-USD | 1.6921 | 0.0008 | 0.05 |
| USD-JPY | 102.75 | (0.04) | (0.04) |

| Bond Markets | Closing | Chg |
|----------------|---------|------------|
| 10-yr bond | 8.66 | 5.4 bps |
| Interbank call | 7.90 | -88.11 bps |



Domestic News (Cont...)

- ❖ Realty firm Tata Housing today announced a joint venture with Keventer group for a 3-acre luxury residential project in Kolkata. (BS)
- ❖ Pidilite Industries today reported a 4.67% increase in consolidated net profit at Rs 168.52 crore for the first quarter ended June 30, 2014. (BS)
- ❖ Cadila Healthcare Ltd reported 23.14% increase in consolidated net profit to Rs 240.21 crore for the quarter ended June 30. (BS)
- ❖ Country's steel major Tata Steel said its 6 million tonne Odisha steel project is on track and the first phase of project is expected to commission by January-March quarter of 2014-15. (BS)
- ❖ Dr Reddy's Laboratories Limited reported a 52.49% jump in net profit at Rs 550.39 crore for the quarter ended June, 2014 on the back of increased revenues and profitability from the global generics business primarily driven by the US market. (BS)
- ❖ Drug firm Lupin reported a 55.74% rise in consolidated net profit at Rs 624.7 crore for the quarter ended June 30, 2014, mainly on account of robust sales in the US and India. (BS)
- ❖ Tyre maker Goodyear India reported 12.84 % increase in net profit to Rs 28.91 crore for the second quarter ended on June 30. (BS)
- ❖ Forging major Bharat Forge (BFL) has recorded a 60% jump in its net profit at Rs 144.97 crore as compared to Rs 90.60 crore for its first quarter ended June 30, 2014 due to higher sales. (BS)
- ❖ Igarashi Motors India Ltd has posted a growth of 15.7% in net profit at Rs 10.16 crore for the quarter ended June 30, 2014, as against Rs 8.78 crore for the same quarter of the previous year. (BS)
- ❖ Diversified miner Vedanta Resources Plc ground out a marginal increase in quarterly core earnings as its oil and gas and aluminium businesses offset a decline in zinc and copper. (BS)
- ❖ Orchid Pharma will allocate equity shares worth Rs 92 crore to Orchid Healthcare Private Ltd, a promoter Group company. (BS)
- ❖ Dhanuka Agritech Ltd, a leading agrochemical formulations company, reported a 17.87% increase in its net profit at Rs 20.45 crore for the quarter ended June 30, 2014. (BS)



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|--------------------------|--|----------|-------------|-------|
| 30-Jul-14 | Star Ferro & Cement Ltd. | SUPER DIAMOND NIRMAN PVT. LTD. | BUY | 1350000 | 45.0 |
| 30-Jul-14 | Gammon India Ltd. | CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED | SELL | 691272 | 28.8 |
| 30-Jul-14 | Arvind Remedies Limited | ARYAMAN COMMERCE PVT LTD | SELL | 380200 | 30.5 |
| 30-Jul-14 | Ind-Swift Labs Ltd. | MANAV N PATEL | BUY | 225829 | 45.0 |
| 30-Jul-14 | Dr. Datson's Labs Ltd | AUCTOR INVESTMENTS LTD (FCCB) | SELL | 407055 | 11.4 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|--------------------|--|----------|-------------|-------|
| 30-Jul-14 | Sequent Scientific | PRIMERA PARTNERS PTE LTD | S | 1,000,000 | 365.0 |
| 30-Jul-14 | Brahmaputra Infra | SURESH KUMAR PRITHANI | S | 840,000 | 35.2 |
| 30-Jul-14 | Cubical Fin | MRIDUL SECURITIES PVT LTD | B | 541,040 | 18.5 |
| 30-Jul-14 | Virtual Global | SHREE SUDHARSHAN CASTINGS PVT LTD | S | 2,500,000 | 3.8 |
| 30-Jul-14 | Jenburkt Pharma | DINERO WEALTH ADVISORS PRIVATE LIMITED | B | 28,646 | 188.0 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|--------------------|-----------|--------------------------------|-------------|
| 512599 | Adani Enter | 31-Jul-14 | Dividend - Rs.1.40 | - |
| 532921 | Adani Ports | 31-Jul-14 | Dividend - Rs.1.00 | - |
| 523411 | ADCINDIA | 31-Jul-14 | Dividend - Rs.2.50 | - |
| 532749 | Allcargo Logistics | 31-Jul-14 | Dividend - Rs.1.50 | - |
| 511605 | Arihant Cap | 31-Jul-14 | Dividend - Rs.0.75 | - |
| 532759 | Atlanta | 31-Jul-14 | Dividend - Rs.0.24 | - |
| 532230 | Bengal Tea | 31-Jul-14 | Dividend - Rs.2.00 | - |
| 531719 | Bhagiradha Che | 31-Jul-14 | Dividend - Rs.1.00 | - |
| 501425 | Bombay Burmah | 31-Jul-14 | Dividend - Rs.1.00 | - |
| 526817 | Cheviot Co-\$ | 31-Jul-14 | Dividend - Rs.15.00 | - |
| 500117 | DCW | 31-Jul-14 | Dividend - Rs.0.36 | - |
| 506401 | Deepak Nitrite-\$ | 31-Jul-14 | Dividend - Rs.1.00 | - |
| 532488 | Divis Lab | 31-Jul-14 | Dividend - Rs.20.00 | - |
| 503681 | Elcid Invest | 31-Jul-14 | Dividend - Rs.10.00 | - |
| 533208 | Emami Paper | 31-Jul-14 | Dividend - Rs.0.60 | - |
| 500150 | Foseco India | 31-Jul-14 | 2nd Interim Dividend - Rs.4.00 | 01-Aug-14 |
| 532345 | Gati | 31-Jul-14 | Final Dividend - Rs.0.70 | - |
| 500164 | Godrej Inds | 31-Jul-14 | Final Dividend - Rs.1.75 | - |
| 532129 | Hexaware Tech | 31-Jul-14 | Interim Dividend - Rs.1.60 | 02-Aug-14 |
| 532960 | Indiabulls Sec | 31-Jul-14 | Interim Dividend - Rs.1.00 | 01-Aug-14 |
| 507580 | IVP | 31-Jul-14 | Dividend - Rs.1.00 | - |
| 532926 | Jyothy Lab | 31-Jul-14 | Final Dividend - Rs.2.00 | - |

Global Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|---------------------------------|--------|----------|----------|
| 28-Jul-14 | USD | Pending Home Sales (MoM) | | 0.50% | 6.10% |
| 28-Jul-14 | USD | Dallas Fed Mfg Business Index | | | 11.4 |
| 29-Jul-14 | JPY | Retail Sales (YoY) | | -0.50% | -0.40% |
| 29-Jul-14 | GBP | BoE Consumer Credit | | 0.80B | 0.74B |
| 29-Jul-14 | GBP | Mortgage Lending | | 1.90B | 1.99B |
| 29-Jul-14 | USD | S&P/CS HPI Composite - 20 (YoY) | | 10.00% | 10.80% |
| 29-Jul-14 | USD | CB Consumer Confidence | | 85.3 | 85.2 |
| 30-Jul-14 | JPY | Industrial Production (MoM) | | -1.20% | 0.70% |
| 30-Jul-14 | EUR | Consumer Confidence | | -8 | -7.5 |
| 30-Jul-14 | USD | MBA 30-Year Mortgage Rate | | | 4.33% |
| 30-Jul-14 | USD | ADP Nonfarm Employment Change | | 230K | 281K |
| 30-Jul-14 | USD | GDP (QoQ) | | 3.00% | -2.90% |
| 31-Jul-14 | GBP | Nationwide HPI (MoM) | | 0.50% | 1.00% |
| 31-Jul-14 | EUR | CPI (YoY) | | 0.50% | 0.50% |
| 31-Jul-14 | EUR | Unemployment Rate | | 11.60% | 11.60% |
| 31-Jul-14 | USD | Initial Jobless Claims | | 300K | 284K |
| 31-Jul-14 | USD | Chicago PMI | | 63 | 62.6 |
| 01-Aug-14 | JPY | Manufacturing PMI | | 50.8 | 51.5 |
| 01-Aug-14 | CNY | Chinese HSBC Manufacturing PMI | | | 52 |
| 01-Aug-14 | EUR | Manufacturing PMI | | 51.9 | 51.9 |
| 01-Aug-14 | GBP | Manufacturing PMI | | 57.2 | 57.5 |
| 01-Aug-14 | USD | Core PCE Price Index (MoM) | | 0.10% | 0.20% |
| 01-Aug-14 | USD | Nonfarm Payrolls | | 235K | 288K |
| 01-Aug-14 | USD | Personal Spending (MoM) | | 0.40% | 0.20% |
| 01-Aug-14 | USD | Private Nonfarm Payrolls | | 230K | 262K |
| 01-Aug-14 | USD | Unemployment Rate | | 6.10% | 6.10% |
| 01-Aug-14 | USD | Manufacturing PMI | | | 56.3 |
| 01-Aug-14 | USD | Michigan Consumer Sentiment | | 81.8 | 81.3 |
| 01-Aug-14 | USD | Construction Spending (MoM) | | 0.50% | 0.10% |
| 01-Aug-14 | USD | ISM Manufacturing PMI | | 56 | 55.3 |

Indian Economic Calendar

| Date | Curr. | Event | Actual | Forecast | Previous |
|-----------|-------|-------------------------------|--------|----------|----------|
| 31-Jul-14 | INR | Infrastructure Output (YoY) | | | 2.30% |
| 01-Aug-14 | INR | HSBC Markit Manufacturing PMI | | | 51.5 |

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