

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	8169	0.97	CNX IT	11125	1.95
Sensex	27346	0.92	BANK NIFTY	16760	0.76
DowJones	17195	1.30	S&P CNX 500	6570	0.87
Nasdaq	4566	0.37	CNX FMCG	19305	0.55
Hangseng	23878	0.74	CNX REALTY	3642	0.27
Shanghai	2391	(0.02)	CNX AUTO	8129	0.31
Nikkei	15924	1.70	CNX ENERGY	9543	1.55
Strait Times	3242	0.24	CNX PHARMA	10668	0.15
Kospi	1962	0.15	Advances / Declines	BSE	NSE
Taiwan	8906	0.20	Advances	1569	820
FTSE	6464	0.15	Declines	1355	685
CAC	4141	0.74	Unchanged	118	71
DAX	9115	0.35	Total	3042	1576

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HCLTECH	1583.00	4.70
DLF	123.15	4.23
TECHM	2479.00	3.42
INDUSINDBK	711.90	2.82
RELIANCE	978.00	2.77

Nifty Losers		
Company	Price(Rs)	Chg(%)
CAIRN	281.75	(1.50)
AMBUJACEM	223.05	(1.37)
SSLT	252.80	(1.00)
M&M	1287.50	(0.84)
CIPLA	651.45	(0.83)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
GRINDWELL	1.01	0.1	8
JKIL	2.77	0.3	8
SRTRANSFIN	11.33	1.5	8
GESHIP	5.44	0.7	7
GULFOILLUB	2.95	0.4	7

Indian Forex	Closing	Chg	% Chg
USD/INR	61.464	0.146	0.24
GBP/INR	98.213	(0.791)	(0.80)
EUR/INR	77.450	(0.693)	(0.89)
JPY/INR	56.340	(0.420)	(0.74)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	26654	(486)
Silver (Rs/1kg)	37406	(698)

Commodities	Price	% Chg.
Crude (US\$/BBL)	81.0	(1.18)
Brent (US\$/BBL)	85.9	(1.20)
Gold (US/oz)	1197.8	(1.29)
Silver (US\$/oz)	16.4	(4.71)
Copper (US\$/MT)	6785.0	(1.02)
Alum (US\$/MT)	2015.5	0.17
Zinc(US\$/MT)	2283.0	0.79

ADR	Cl. Values	% Chg.
ICICI Bank	55.01	0.01
HDFC Bank	50.80	0.40
Infosys	65.24	1.24
Sterlite Inds.	6.22	0.00
Dr. Deddy's Labs	50.93	0.21
Wipro	11.96	0.22
Tata Motors	45.76	(0.10)

Market Sensor

US market jumped on Thursday, with Visa helping lift the Dow industrials into the green for October, after data showed the U.S. economy grew more than expected last quarter. Dow Jones Industrial Average was up 1.30% or 221.11 points at 17195.42. Nasdaq Composite was up 0.37% or 16.91 points at 4566.14. Standard & Poor's 500 was up 0.62% or 12.35 points at 1994.65.

Indian equity market edged higher and created new record high on October F&O Expiry, market started on a positive zone and created new intraday high and closed on a positive zone, moreover, the Cabinet approves easing FDI rules in construction sector and media report of cut fuel price boosted the market sentiment. Nifty ended the previous trading session with a gain of 0.97% or 78.75 points at 8169.20. On Thursday's trading session, FIIs bought net Rs.1257.49 Cr in cash market and bought net Rs.5770.35 in derivative segment. Whereas, DI sold net Rs.94.01 Cr in cash segment.

Coming to today's trade Nifty likely to remain volatile, crucial intraday support seen at 8130 followed by 8090 while resistance exist at 8200 and then at 8250.

Global News

❖ Japan's inflation slowed to its lowest pace in half a year, underlining the challenge to central bank chief Haruhiko Kuroda's efforts to reflate the world's third-biggest economy. Consumer prices excluding fresh food increased 3.0 percent in September. (Bloomberg)

❖ U.K. consumer confidence weakened this month as Britons' outlook for the economy deteriorated, according to GfK NOP Ltd. The research group's household-sentiment index fell to minus 2 from minus 1 in September. (Bloomberg)

❖ Russia's central bank will probably increase its benchmark interest rate for the fourth time this year, bringing it to the highest level since it was introduced 13 months ago, to halt a currency run that's stoking inflation. (Bloomberg)

❖ The U.S. economy expanded more than forecast in the third quarter, validating the optimism that prompted Federal Reserve policy makers to stop pumping money into financial markets. Gross domestic product grew at a 3.5 percent annualized rate in the three months ended September after a 4.6 percent gain in the second quarter. (Bloomberg)

Economic News

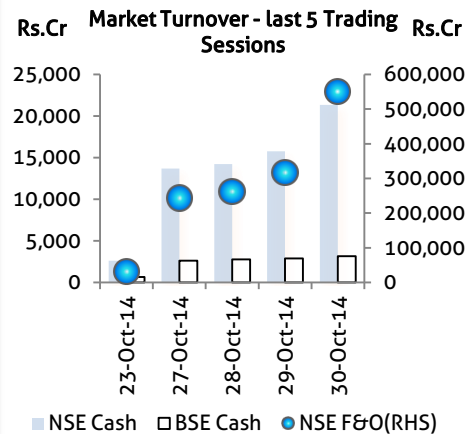
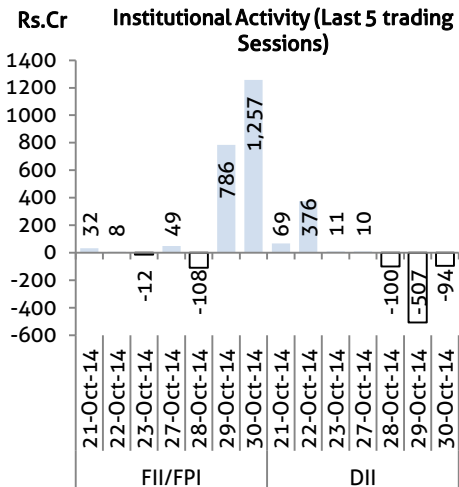
- ❖ The government's austerity drive announced, would lead to a saving of up to Rs 40,000 crore or 0.3% of the Gross Domestic Product (GDP) but poses risks to growth, Japanese brokerage Nomura has said. (BS)
- ❖ Indian Oil Marketing Companies (OMCs) could cut prices of petrol and diesel by up to Rs 2.50 per litre on Friday as falling global crude oil prices have driven down cost of products. (BS)
- ❖ Once familiar for a sudden upsurge in demand from the United States and raising prices thereby to unjustifiable level few years ago, guar gum has lost its credibility as the only sprinkler used in the fracking process in shale gas wells. Consequently, guar gum export is set to erase gains in initial months and end the current financial year with a decline of over 10%. (BS)
- ❖ India's universal health plan that aims to offer guaranteed benefits to a sixth of the world's population will cost an estimated Rs 160,000 crore over the next four years, a senior health ministry official said. (BS)
- ❖ Unveiling an austerity drive to cut non-plan expenditure by 10%, government has barred bureaucrats from travelling First Class on overseas visits and have been asked to use video conferencing as much as possible. (BS)
- ❖ Federal Reserve chairperson Janet Yellen finally pulled the plug on what many believed was the global markets' lifeline. However, markets did not react in the way they were expected to. This is mainly because what Fed had done was already known and priced in by the markets. In fact, if Yellen would have delayed pulling the plug market would have taken it negatively believing that the central bank was not sure of the stability of the US economy. (BS)

Domestic News

- ❖ In a bid to avoid any disruption in mobile services in Delhi and Kolkata circles, key officials of Bharti Airtel, Vodafone India and Idea Cellular, the top three cellular operators in the country, will meet Rakesh Garg, secretary, Department of Telecommunications (DoT) on Friday. (BS)
- ❖ Titan Company Ltd reported 28.3% rise in net profit at Rs 240 crore for the second quarter ended September 2014 compared to Rs 187 crore in the corresponding quarter last year. The income from operations in the second quarter, July to September 2014, was Rs 3564.67 crore, a growth of 55.7% over last year's income of Rs.2290.02 crore during the same period. (BS)
- ❖ New India Assurance has posted a 40% increase in net profit for April to September period (first half of FY15) this fiscal compared to same period previous year. The net profit increased to Rs 899 crore in the period against Rs 644 crore in same period previous fiscal. (BS)
- ❖ Taking the patent battle to Novartis, India's Cipla has launched low-cost generic version of the Swiss drug maker's respiratory drug Indacaterol sold under the Onbrez brand, while asking the government to revoke patents over the medicine. (BS)
- ❖ Bharti Airtel, country's largest mobile operator, reported nearly three-fold jump in consolidated net profit to Rs 1,383 crore for the second quarter ended September 30, 2014 on the back of higher mobile data revenue. (BS)
- ❖ Private sector lender Yes Bank has reported 30% increase in net profit at Rs 482.54 crore for the quarter ended September 30, 2014 on the back of higher income from fee and other sources. (BS)

Global Forex	Closing	Chg	% Chg
EUR-USD	1.2598	(0.0015)	(0.12)
GBP-USD	1.5889	(0.0013)	(0.08)
USD-JPY	109.39	0.18	0.16

Bond Markets	Closing	Chg
10-yr bond	8.40	-4.3bps
Interbank call	8.00	9.53bps



Domestic News (Cont...)

❖ HP-owned IT services firm Mphasis reported a net profit of Rs 160.20 crore for the quarter ended September 30, 2014. (BS)

❖ ICICI Bank – the country's largest private sector lender reported a net profit of Rs 2,709 crore for the quarter ended September 30 which is higher by 15% as compared to the same period of the previous year. (BS)

❖ Travel firm Thomas Cook (India) reported a consolidated net profit of Rs 22.18 crore for the third quarter ended on September 30, 2014. (BS)

❖ Cement manufacturer ACC Ltd reported a whopping 62% rise in its consolidated net profit for July-September quarter at Rs 192.60 crore on better cost management and improved realisations. (BS)

❖ Auto major Maruti Suzuki reported a 29% increase in net profit at Rs 863 crore for the quarter ended September 2014. It was Rs 670 crore in the same period a year ago. (BS)

❖ State-owned Allahabad Bank reported 49 per cent decline in net profit at Rs 141.44 crore for the second quarter ended September on higher tax outgo and fall in other income. (BS)

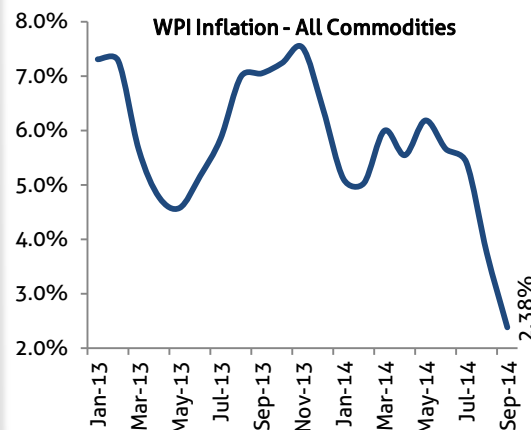
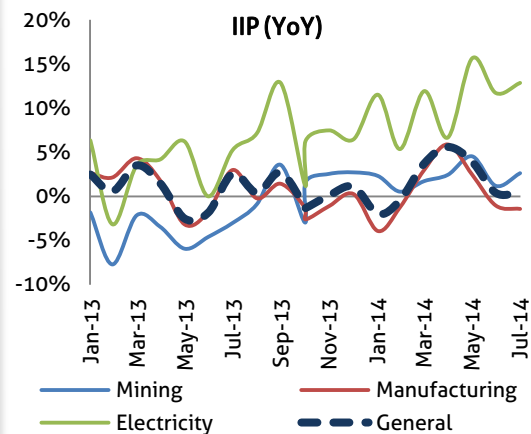
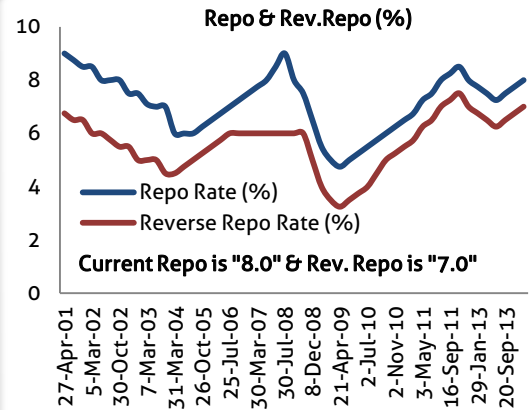
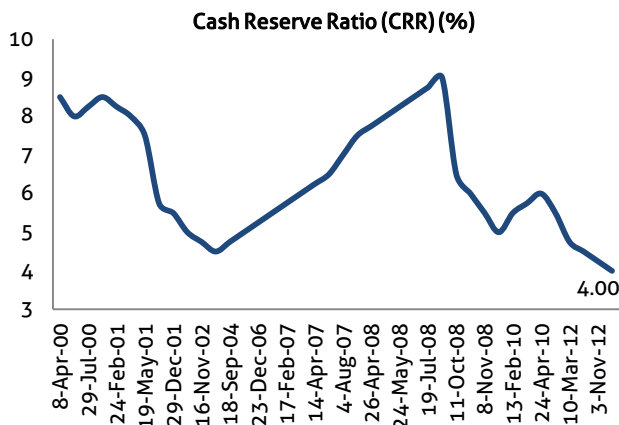
❖ Jubilant Foodworks Ltd that runs food chains, including Domino's Pizza and Dunkin' Donuts in India, reported 12.75% decline in standalone net profit at Rs 29 crore for the second quarter ended September 30, hurt by higher expenses. (BS)

❖ Generic drugmaker Cipla Ltd said on Thursday it had requested the government to revoke five patents held by Swiss firm Novartis AG on respiratory drug Onbrez, to boost its access in the Indian market. (BS)

❖ Public sector Andhra Bank's net profit more than doubled to Rs 144.49 crore in the second quarter ended September 31, 2014-15 on higher income from retail banking operations. (BS)

❖ Under-recoveries of Indian Oil Marketing Companies (OMCs) on subsidized sale of diesel, LPG and Kerosene dipped 16% in the first half of current fiscal. Also, had it not been for the 32% jump in losses on LPG sales, total URs would have been further low. (BS)

❖ Andhra Bank has reported a 104.5% increase in net profit at Rs 144.49 crore in the quarter ended September, 2014 as the agriculture loan roll overs in Telangana and Andhra Pradesh saved the bank from fresh interest reversals and NPAs. The net profit of the bank in the corresponding quarter last year stood at Rs 70.65 crore. (BS)



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Oct-14	PTC India Limited	MARFATIA NISHIL SURENDRA	SELL	3666873	88.2
30-Oct-14	Unitech Ltd	SUNTECK WEALTHMAX CAPITAL PRIVATE LIMITED	BUY	13434675	18.6
30-Oct-14	Insecticides (India) Limi	N.K. SECURITIES	SELL	91080	858.3
30-Oct-14	Astec LifeSciences Ltd	CROSSEAS CAPITAL SERVICES PVT. LTD.	SELL	195646	100.8
30-Oct-14	Panasonic Appl.Ind Co Ltd	MEHRANGARH FINANCIAL ADVISORS PRIVATE LIMITED	SELL	48000	272.4

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
30-Oct-14	PICTUREHS	BLOOMFIELD POWER PROJECTS PRIVATE LIMITED	B	4,100,000	18.0
30-Oct-14	ASTEC	CROSSEAS CAPITAL SERVICES PRIVATE LIMITED	B	196,286	100.8
30-Oct-14	MOLDTKPAC	VORA FINANCIAL SERVICES PRIVATE LIMITED	S	72,922	236.6
30-Oct-14	DELTALTD	SANDEEP KUMAR	B	89,300	74.5
30-Oct-14	VGCL	VIMALKUMAR PRAHLADRAI AGRAWAL	B	252,000	19.3

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
511072	DHFL	31-Oct-14	Interim Dividend - Rs.4.00	04-Nov-14
500696	HINDUNILVR	31-Oct-14	Interim Dividend - Rs.6.00	03-Nov-14
522241	MMFL-\$	03-Nov-14	Interim Dividend - Rs.3.00	05-Nov-14
500295	SSLT	03-Nov-14	Interim Dividend - Rs.1.75	05-Nov-14
532830	ASTRAL	05-Nov-14	Interim Dividend - Rs.0.15	08-Nov-14
531112	BELAGRO	05-Nov-14	Reduction of Capital	07-Nov-14
532504	NAVINFLUOR	05-Nov-14	Interim Dividend - Rs.7.50	07-Nov-14
532735	RSYSTEMS	05-Nov-14	3rd Interim Dividend - Rs.0.90	07-Nov-14
534927	EBFL	07-Nov-14	Right2:3	10-Nov-14
532899	KSCL	07-Nov-14	Interim Dividend - Rs.2.50	10-Nov-14
590065	IMPAL	10-Nov-14	Special Dividend - Rs.4.00	11-Nov-14
526433	ASMTEC	11-Nov-14	Interim Dividend - Rs.1.20	12-Nov-14
532424	GODREJCP	11-Nov-14	2nd Interim Dividend - Rs.-	12-Nov-14
531213	MANAPPURAM	12-Nov-14	Interim Dividend - Rs.0.45	13-Nov-14
524208	AARTIIND	13-Nov-14	Interim Dividend - Rs.-	14-Nov-14
523537	APMIN-\$	13-Nov-14	Interim Dividend - Rs.-	14-Nov-14
531642	MARICO	13-Nov-14	1st Interim Dividend - Rs.-	14-Nov-14
500290	MRF	13-Nov-14	2nd Interim Dividend - Rs.3.00	14-Nov-14
523642	PIIND	13-Nov-14	Interim Dividend - Rs.1.20	14-Nov-14
533121	SQSBFSI	13-Nov-14	Interim Dividend - Rs.4.00	14-Nov-14
526612	BLUEDART	17-Nov-14	Scheme of Arrangement	18-Nov-14
532827	PAGEIND	17-Nov-14	2nd Interim Dividend - Rs.-	18-Nov-14

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
27-Oct-14	USD	Services PMI (Oct)		58	58.9
27-Oct-14	USD	Pending Home Sales (MoM) (Sep)		0.50%	-1.00%
28-Oct-14	JPY	Retail Sales (YoY) (Sep)		0.60%	1.20%
28-Oct-14	USD	Durable Goods Orders (MoM) (Sep)		0.50%	-18.40%
28-Oct-14	USD	CB Consumer Confidence (Oct)		87	86
28-Oct-14	USD	Richmond Manufacturing Index (Oct)		11	14
29-Oct-14	JPY	Industrial Production (MoM) (Sep)		2.20%	-1.90%
29-Oct-14	GBP	BoE Consumer Credit (Sep)		0.800B	0.898B
29-Oct-14	GBP	Mortgage Lending (Sep)		2.00B	2.29B
29-Oct-14	USD	MBA 30-Year Mortgage Rate			4.10%
29-Oct-14	USD	Fed Funds Target Rate		0.25%	0.25%
30-Oct-14	GBP	Nationwide HPI (MoM) (Oct)		0.30%	-0.20%
30-Oct-14	EUR	Consumer Confidence (Oct)		-11	-11.4
30-Oct-14	EUR	Industrial Sentiment (Oct)		-6	-5.5
30-Oct-14	USD	Continuing Jobless Claims		2,350K	2,351K
30-Oct-14	USD	GDP (QoQ) (Q3)		3.00%	4.60%
30-Oct-14	USD	Initial Jobless Claims		283K	283K
31-Oct-14	JPY	Tokyo CPI (YoY) (Oct)		2.70%	2.90%
31-Oct-14	JPY	Unemployment Rate (Sep)		3.60%	3.50%
31-Oct-14	GBP	GfK Consumer Confidence (Oct)		-2	-1
31-Oct-14	JPY	Interest Rate Decision		0.10%	0.10%
31-Oct-14	EUR	CPI (YoY) (Oct)		0.40%	0.30%
31-Oct-14	EUR	Unemployment Rate (Sep)		11.50%	11.50%
31-Oct-14	USD	Core PCE Price Index (MoM) (Sep)		0.10%	0.10%
31-Oct-14	USD	Personal Income (MoM) (Sep)		0.30%	0.30%
31-Oct-14	USD	Chicago PMI (Oct)		60	60.5
31-Oct-14	USD	Michigan Consumer Sentiment (Oct)		86.4	86.4

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
29-Oct-14	INR	M3 Money Supply (2wk)			12.60%
31-Oct-14	INR	Federal Fiscal Deficit (Sep)			3,979.29B
31-Oct-14	INR	Bank Loan Growth (2wk)			11.00%
31-Oct-14	INR	Deposit Growth (2wk)			13.10%
31-Oct-14	INR	FX Reserves, USD			313.68B
31-Oct-14	INR	Infrastructure Output (YoY) (Sep)			5.80%

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