



Market Snapshot

| KEY INDICES | This Week | Previous Week | Change |
|----------------------|-----------|---------------|--------|
| S&P CNX Nifty | 10696.20 | 10605.15 | 0.86% |
| Sensex | 35227.26 | 34924.87 | 0.87% |
| BSE Midcap | 15852.51 | 15904.41 | -0.33% |
| BSE Smallcap | 16978.96 | 17151.43 | -1.01% |
| Nifty Mid 100 free | 18635.70 | 18787.40 | -0.81% |
| Nifty Small 100 free | 7700.35 | 7814.50 | -1.46% |

Sectoral Snapshot

| KEY INDICES | This Week | Previous Week | Change |
|----------------|-----------|---------------|--------|
| Bse Auto | 24635.29 | 24191.63 | 1.83% |
| BSE Cap Goods | 18694.89 | 18605.06 | 0.48% |
| BSE Cons Durab | 20574.51 | 21111.10 | -2.54% |
| BSE FMCG | 11216.01 | 11223.31 | -0.07% |
| BSE IT | 13326.16 | 13549.52 | -1.65% |
| BSE Metal | 13506.00 | 13498.31 | 0.06% |
| BSE Oil | 14342.30 | 13937.92 | 2.90% |
| BSE Power | 2089.12 | 2108.69 | -0.93% |
| BSE PSU | 7799.55 | 7710.99 | 1.15% |
| BSE Reality | 2210.67 | 2239.36 | -1.28% |
| BSE Bankex | 29780.74 | 29540.97 | 0.81% |
| BSE Healthcare | 12945.45 | 13044.21 | -0.76% |

Sensex Gainers - Weekly

| Scripts | This Week | Previous Week | Change |
|----------------|-----------|---------------|--------|
| Coal India Ltd | 294.35 | 276.05 | 6.63% |
| M&M | 901.55 | 857.30 | 5.16% |
| HDFC Bank Ltd | 2109.55 | 2011.65 | 4.87% |
| Bajaj Auto Ltd | 2893.25 | 2759.85 | 4.83% |
| SUNPHARMA | 482.90 | 466.55 | 3.50% |

Sensex Losers - Weekly

| Scripts | This Week | Previous Week | Change |
|-----------------|-----------|---------------|--------|
| TCS | 1732.25 | 1794.73 | -3.48% |
| POWERGRID | 205.90 | 211.95 | -2.85% |
| Tata Motors Ltd | 287.20 | 294.20 | -2.38% |
| ICICI Bank Ltd | 289.50 | 296.50 | -2.36% |
| DRREDDY | 1941.45 | 1971.90 | -1.54% |

Nifty Gainers - Weekly

| Scripts | This Week | Previous Week | Change |
|------------------|-----------|---------------|--------|
| BPCL | 409.25 | 380.55 | 7.54% |
| GAIL (India) Ltd | 341.35 | 319.15 | 6.96% |
| Coal India Ltd | 294.65 | 275.60 | 6.91% |
| HINDPETRO | 312.15 | 295.20 | 5.74% |
| IOC | 172.35 | 163.45 | 5.45% |

Nifty Losers - Weekly

| Scripts | This Week | Previous Week | Change |
|---------------------|-----------|---------------|--------|
| Bharti Infratel Ltd | 300.65 | 314.85 | -4.51% |
| TCS | 1732.45 | 1792.90 | -3.37% |
| Bajaj Finserv Ltd | 5882.20 | 6071.70 | -3.12% |
| POWERGRID | 205.95 | 212.05 | -2.88% |
| HINDALCO | 238.50 | 245.50 | -2.85% |

FII & DII Activities (Rs Crore) for the period of 25/05/2018 to 01/06/2018

| Activities | FIIs | DIIs |
|------------|----------|----------|
| Buy | 26871.33 | 25162.89 |
| Sell | 29959.52 | 22114.69 |
| Net | -3088.19 | 3048.20 |

Key barometers jump as crude prices correct

The market jumped last week as a drop in crude prices and a recovery in the rupee boosted sentiment. Markets across the globe were volatile due to Italy's political crisis and fresh fears of a global trade war. Sensex rose 302.39 points or 0.87% to settle at 35,227.26. The Nifty 50 index rose 91.05 points or 0.86% to settle at 10,696.20. The BSE Mid-Cap index fell 51.90 points or 0.33% to settle at 15,852.51. The BSE Small-Cap index fell 172.47 points or 1.01% to settle at 16,978.96.

On the macro front, activity in India's manufacturing sector grew at a weaker pace in May from the previous month. The Nikkei India Purchasing Managers Index fell to 51.2 in May from 51.6 in the previous month.

India's GDP rose at 7.7% in the fourth quarter of 2017-18 compared with 6.1% in the same period last year, and a revised 7% in the quarter ended December. For the full financial year, GDP grew at 6.7% compared with 7.1% in the previous year.

On the global front, investors welcomed an apparent end to a political crisis in Italy, although prospects of a full-blown trade war put a dampener on gains. In Europe, leaders of Italy's anti-establishment parties revived coalition plans, apparently ending three months of political turmoil.

In US, the Trump administration announced it was imposing a 25% tariff on steel imports and a 10% tariff on aluminium imports from the European Union, Canada and Mexico effective midnight Friday, 1 June 2018.

In Asia, activity in China's factories held steady in May, a private gauge indicated, pointing to a sustained growth momentum in the world's second largest economy. The Caixin China manufacturing purchasing managers' index held steady at 51.1 in May, buoyed by a pick-up in production and new orders.

On NSE top performer was BPCL after the company reported impressive quarterly results while Bharti Infratel was top loser. BSE top gainer was Coal India after the announcement of quarterly numbers. TCS was top loser for the week after the stock adjusted for bonus share issue.

BSE midcap stocks were led by Torrent power following good quarterly result on the other hand JP Associate was top loser.

BSE sectoral indices was led by BSE OIL due to BPCL followed by BSE Auto due to M&M after the company reported impressive auto sales figures.

Meanwhile BSE CD was top loser due to PC Jewellers followed by BSE IT due to HCL Infosystems after the company posted poor quarterly numbers.

Outlook and Technical View

The outcome of the Reserve Bank of India's (RBI) monetary policy meeting and macroeconomic data will dictate trend on the bourses next week. The RBI's Monetary Policy Committee (MPC) will meet on 4-6 June 2018 for the second bi-monthly monetary policy statement for 2018-2019. The resolution of the MPC will be unveiled at 14:30 pm on 6 June 2018.

From the technical standpoint, Nifty may find support at 10663, 10631, 10580 while levels of 10747, 10797, 10830 may act as resistance, with 10714 being the pivot point.

BSE Mid-Cap Gainers - Weekly

| Scripts | This Week | Previous Week | Change |
|------------------|-----------|---------------|--------|
| Torrent Power | 267.85 | 230.15 | 16.38% |
| Rel. Comm. | 16.45 | 14.25 | 15.44% |
| Torrent Pharma. | 1453.75 | 1319.65 | 10.16% |
| Glaxosmi. Pharma | 2533.65 | 2350.75 | 7.78% |
| Indian Bank | 337.85 | 315.95 | 6.93% |

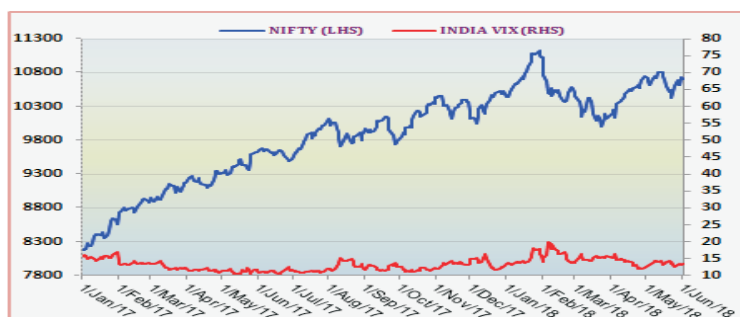
BSE Mid-Cap Losers - Weekly

| Scripts | This Week | Previous Week | Change |
|----------------|-----------|---------------|--------|
| JP Associates | 14.60 | 16.10 | -9.32% |
| Divi's Lab. | 1049.75 | 1145.70 | -8.37% |
| Cadila Health. | 353.80 | 382.50 | -7.50% |
| GMR Infra. | 16.70 | 17.90 | -6.70% |
| Sun TV Network | 886.45 | 950.05 | -6.69% |

World Markets

| KEY INDICES | This Week | Previous Week | Change |
|--------------------|-----------|---------------|--------|
| DJIA | 24635.21 | 24753.09 | -0.48% |
| Nasdaq | 7554.33 | 7433.85 | 1.62% |
| Nikkei 225 | 22171.35 | 22450.79 | -1.24% |
| Straits Times | 3427.51 | 3513.23 | -2.44% |
| Hang Seng | 30492.91 | 30588.04 | -0.31% |
| FTSE 100 | 7701.77 | 7730.28 | -0.37% |
| DAX | 12724.27 | 12938.01 | -1.65% |
| Shanghai Composite | 3075.14 | 3141.30 | -2.11% |
| JAKARTA | 5983.59 | 5975.74 | 0.13% |
| Bovespa (Brazil) | 77239.75 | 78897.66 | -2.10% |
| MoeX (Russia) | 2295.34 | 2306.57 | -0.49% |
| CAC 40 | 5465.53 | 5542.55 | -1.39% |

Nifty Vs. INDIA VIX



Derivative Weekly Wrap

Open Interest Details

| Symbol | Expiry Date | LTP | Previous LTP | Change | Premium/dis. Over Spot | Open Interest | Prev. Open Interest | Change in OI |
|-----------|-------------|----------|--------------|--------|------------------------|---------------|---------------------|--------------|
| NIFTY | 28-Jun-2018 | 10671.30 | 10625.00 | 0.44% | -24.90 | 259934 | 32762 | 693.40% |
| BANKNIFTY | 28-Jun-2018 | 26645.30 | 26284.15 | 1.37% | -47.50 | 67794 | 9897 | 585.00% |

Cost of Carry

POSITIVE

| Symbol | Spot Price | Future Price | Expiry Date | Cost of Carry |
|-------------|------------|--------------|-------------|---------------|
| ENGINEERSIN | 132.05 | 133.90 | 28-Jun-18 | 19.67% |
| HCC | 14.80 | 14.95 | 28-Jun-18 | 14.23% |
| IDFCBANK | 40.75 | 41.05 | 28-Jun-18 | 10.34% |
| EQUITAS | 165.20 | 166.30 | 28-Jun-18 | 9.35% |
| NCC | 120.10 | 120.85 | 28-Jun-18 | 8.77% |
| MGL | 801.05 | 806.05 | 28-Jun-18 | 8.76% |
| GSFC | 114.55 | 115.25 | 28-Jun-18 | 8.58% |
| PNB | 82.95 | 83.45 | 28-Jun-18 | 8.46% |
| SHREECEM | 16656.40 | 16756.00 | 28-Jun-18 | 8.39% |
| SUZLON | 8.40 | 8.45 | 28-Jun-18 | 8.36% |
| CGPOWER | 59.20 | 59.55 | 28-Jun-18 | 8.30% |
| IFCI | 17.20 | 17.30 | 28-Jun-18 | 8.16% |

NEGATIVE

| Symbol | Spot Price | Future Price | Expiry Date | Cost of Carry |
|----------|------------|--------------|-------------|---------------|
| INFIBEAM | 168.65 | 164.65 | 28-Jun-18 | -33.30% |
| OFSS | 3823.25 | 3738.10 | 28-Jun-18 | -31.27% |
| JUSTDIAL | 574.95 | 567.65 | 28-Jun-18 | -17.82% |
| MRPL | 91.65 | 90.80 | 28-Jun-18 | -13.02% |

WEEKLY VOLUME ALERTS

The Following Stocks displayed surge in Volume during the week and can be one of the trigger for deciding trading/investment stocks.

1. ICICI Bank
2. Tata Steel
3. Jindal Steel
4. SAIL
5. Ashok Leyland
6. NCC
7. Firstsource Sol
8. Crompton Greave
9. Rural Elect Cor
10. Dewan Housing
11. Manappuram

PUT-CALL RATIO

| Symbol | PUT | CALL | RATIO |
|--------|----------|----------|-------|
| NIFTY | 57609775 | 38958375 | 1.48 |

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