



Market Snapshot

KEY INDICES	This Week	Previous Week	Change
S&P CNX Nifty	10772.65	10714.30	0.54%
Sensex	35657.86	35423.48	0.66%
BSE Midcap	15391.62	15450.90	-0.38%
BSE Smallcap	16059.94	16032.15	0.17%
Nifty Mid 100 free	18222.05	18181.30	0.22%
Nifty Small 100 free	7222.90	7177.75	0.63%

Sectoral Snapshot

KEY INDICES	This Week	Previous Week	Change
Bse Auto	24702.02	23838.30	3.62%
BSE Cap Goods	17524.62	17488.15	0.21%
BSE Cons Durab	19584.99	20206.69	-3.08%
BSE FMCG	11363.56	11213.28	1.34%
BSE IT	13943.23	13920.07	0.17%
BSE Metal	12620.30	13064.49	-3.40%
BSE Oil	13694.66	13659.50	0.26%
BSE Power	1899.78	1946.64	-2.41%
BSE PSU	7225.41	7291.60	-0.91%
BSE Reality	2052.06	2073.37	-1.03%
BSE Bankex	29381.68	29250.56	0.45%
BSE Healthcare	14045.95	14003.64	0.30%

Sensex Gainers - Weekly

Scripts	This Week	Previous Week	Change
Bajaj Auto Ltd	3023.35	2811.15	7.55%
MARUTI	9304.80	8821.20	5.48%
Hero MotoCorp Ltd	3651.55	3472.05	5.17%
Asian Paints Ltd	1322.80	1264.10	4.64%
Yes Bank Ltd	352.40	339.60	3.77%

Sensex Losers - Weekly

Scripts	This Week	Previous Week	Change
Vedanta Ltd	219.50	235.75	-6.89%
NTPC Ltd	150.25	159.45	-5.77%
Bharti Airtel Ltd	363.10	381.00	-4.70%
POWERGRID	181.25	186.65	-2.89%
Tata Steel Ltd	554.15	567.85	-2.41%

Nifty Gainers - Weekly

Scripts	This Week	Previous Week	Change
Bajaj Auto Ltd	3020.10	2810.30	7.47%
MARUTI	9317.50	8825.60	5.57%
Hero MotoCorp Ltd	3637.10	3473.50	4.71%
Asian Paints Ltd	1323.15	1264.45	4.64%
Bajaj Finserv Ltd	6058.55	5821.10	4.08%

Nifty Losers - Weekly

Scripts	This Week	Previous Week	Change
Vedanta Ltd	219.10	236.20	-7.24%
NTPC Ltd	150.15	159.65	-5.95%
Titan Company Ltd	829.65	878.50	-5.56%
Bharti Airtel Ltd	362.25	381.95	-5.16%
HINDALCO	220.45	230.50	-4.36%

FII & DII Activities (Rs Crore) for the period of 29/06/2018 to 06/07/2018

Activities	FIIs	DIIs
Buy	33653.76	21432.51
Sell	32096.80	16729.04
Net	1556.96	4703.47

Market settles with modest gains

Key benchmark indices logged modest gains during the week. However, small and mid-cap indices underperformed the Sensex. Data showing India's manufacturing conditions improved in June at the strongest pace since December 2017 boosted sentiment. However, gains were capped by escalating trade war between the US and China.

In the week ended Friday, 6 July 2018, the Sensex rose 234.38 points or 0.66% to settle at 35,657.86. The Nifty 50 index rose 58.35 points or 0.54% to settle at 10,772.65. The BSE Mid-Cap index fell 59.28 points or 0.38% to settle at 15,391.62. The BSE Small-Cap index rose 27.79 points or 0.17% to settle at 16,059.94.

On the macro front, the seasonally adjusted Nikkei India Services Business Activity Index rose from 49.6 in May to 52.6 in June. The rise in activity was supported by greater inflows of new work. Meanwhile, the seasonally adjusted Nikkei India Composite PMI Output Index rose from 50.4 in May to 53.3 in June, supported by output growth in both the manufacturing and service sectors.

India's manufacturing conditions improved in June at the strongest pace since December 2017, supported by the sharpest gains in output and new orders in 2018 so far. The Nikkei India Manufacturing Purchasing Managers' Index (PMI) rose from 51.2 in May to 53.1 in June.

On the global front, US moved ahead with \$34 billion worth of duties on Chinese products with effect from 6 July 2018. China retaliated with its own tariffs. President Donald Trump reportedly said Thursday that an additional \$16 billion tariffs on China could come in the next two weeks too.

Bajaj Auto was the top gainer on both NSE and BSE after the company reported a 65% growth in its total vehicles sales at 4.04 lakh units in June 2018 over June 2017. Bajaj Auto's total domestic sales rose 85% to 2.34 lakh units, while total exports rose 44% to 1.69 lakh units in June 2018 over June 2017. On the other hand Vedanta was top loser on both the indices. The latter tumbled on the news that the company have decided to delist itself from London Stock Exchange.

Amongst BSE midcap stocks top gainer was Kansai Nerolac. The company entered into share purchase agreement (SPA) to acquire 55% in RAK Paints, Bangladesh. The top loser was Shriram Transport for the week as one of the company's unlisted subsidiary, SVL Ltd, may have inadequate cash flows to service debt raised via NCDs. The STFC annual report has brought to light that the company has provided a guarantee of Rs 870 crore for the NCDs issued by SVL.

Meanwhile in sectoral indices the top gainer was BSE Auto led by Bajaj Auto followed by BSE FMCG led by Zydus Wellness. On the contrary top losers were BSE Metal due to Vedanta and BSE Consumer durables led by Johnson control.

Outlook and Technical View

April to June 2018 quarterly earnings, macroeconomic data, progress of monsoon, trend in global markets, investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs), the movement of rupee against the dollar and crude oil price movement will dictate trend on the bourses in the near term.

From the technical standpoint, Nifty may find support at 10734, 10694, 10653 while levels of 10815, 10856 and 10896 may act as resistance, with 10775 being the pivot point.

BSE Mid-Cap Gainers - Weekly

Scripts	This Week	Previous Week	Change
Kansai Nerolac	481.75	443.10	8.72%
Amara Raja Batt.	772.10	725.50	6.42%
GMR Infra.	16.25	15.30	6.21%
Ashok Leyland	132.30	125.45	5.46%
Berger Paints	296.40	281.25	5.39%

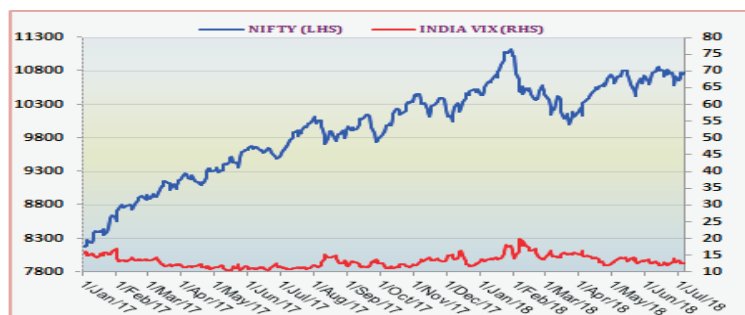
BSE Mid-Cap Losers - Weekly

Scripts	This Week	Previous Week	Change
Shriram Trans.	1110.55	1298.95	-14.50%
IDBI Bank	48.20	54.90	-12.20%
Shri.City Union.	1916.00	2074.75	-7.65%
NLC India	75.25	81.30	-7.44%
Oracle Fin.Serv.	3782.70	4062.70	-6.89%

World Markets

KEY INDICES	This Week	Previous Week	Change
DJIA	24456.48	24271.41	0.76%
Nasdaq	7688.39	7510.30	2.37%
Nikkei 225	21788.14	22304.51	-2.32%
Straits Times	3191.82	3268.70	-2.35%
Hang Seng	28315.62	28955.11	-2.21%
FTSE 100	7617.70	7636.93	-0.25%
DAX	12496.17	12306.00	1.55%
Shanghai Composite	2747.23	2847.42	-3.52%
JAKARTA	5694.91	5799.24	-1.80%
Bovespa (Brazil)	75010.39	72762.51	3.09%
MoeX (Russia)	2345.38	2295.95	2.15%
CAC 40	5375.77	5323.53	0.98%

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	26-Jul-2018	10773.65	10689.95	0.78%	1.00	288245	263760	9.28%
BANKNIFTY	26-Jul-2018	26485.10	26335.00	0.57%	-8.75	52734	48241	9.31%

Cost of Carry

POSITIVE

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SUZLON	7.50	7.60	26-Jul-18	25.61%
GMRINFRA	16.25	16.40	26-Jul-18	17.73%
HCC	11.45	11.55	26-Jul-18	16.78%
RCOM	13.55	13.65	26-Jul-18	14.18%
IFCI	15.45	15.55	26-Jul-18	12.43%
SIEMENS	976.30	982.60	26-Jul-18	12.40%
RPOWER	31.05	31.25	26-Jul-18	12.37%
NHPC	23.35	23.50	26-Jul-18	12.34%
JPASSOCIAT	15.70	15.80	26-Jul-18	12.24%
MGL	809.00	814.15	26-Jul-18	12.23%
NMDC	103.20	103.85	26-Jul-18	12.10%

NEGATIVE

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
INFIBEAM	150.40	148.05	26-Jul-18	-30.02%
INDIGO	1075.45	1071.40	26-Jul-18	-7.23%

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. Ashok Leyland | 5. Crompton Greave | 9. NTPC | 13. NBCC(India) |
| 2. Tata Motors | 6. IOC | 10. Hindalco | 14. BHEL |
| 3. Adani Power | 7. Adani Enterpris | 11. Federal Bank | 15. HPCL |
| 4. Yes Bank | 8. Jain Irrigation | 12. IFCI | 16. Bank of India |

PUT-CALL RATIO

Symbol	PUT	CALL	RATIO
NIFTY	62259750	41165875	1.51

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