



Market Snapshot

KEY INDICES	This Week	Previous Week	Change
S&P CNX Nifty	10714.30	10821.85	-0.99%
Sensex	35423.48	35689.60	-0.75%
BSE Midcap	15450.90	15839.61	-2.45%
BSE Smallcap	16032.15	16539.84	-3.07%
Nifty Mid 100 free	18181.30	18595.85	-2.23%
Nifty Small 100 free	7177.75	7433.20	-3.44%

Sectoral Snapshot

KEY INDICES	This Week	Previous Week	Change
Bse Auto	23838.30	24674.56	-3.39%
BSE Cap Goods	17488.15	17802.31	-1.76%
BSE Cons Durab	20206.69	20215.70	-0.04%
BSE FMCG	11213.28	11129.95	0.75%
BSE IT	13920.07	13623.88	2.17%
BSE Metal	13064.49	12994.22	0.54%
BSE Oil	13659.50	14386.07	-5.05%
BSE Power	1946.64	2006.03	-2.96%
BSE PSU	7291.60	7611.07	-4.20%
BSE Reality	2073.37	2155.56	-3.81%
BSE Bankex	29250.56	29896.64	-2.16%
BSE Healthcare	14003.64	14298.50	-2.06%

Sensex Gainers - Weekly

Scripts	This Week	Previous Week	Change
Infosys Ltd	1306.75	1246.45	4.84%
Vedanta Ltd	235.75	228.65	3.11%
HINDUNILVR	1641.85	1607.55	2.13%
TCS	1847.20	1811.80	1.95%
Bharti Airtel Ltd	381.00	374.60	1.71%

Sensex Losers - Weekly

Scripts	This Week	Previous Week	Change
Tata Motors-DVR	158.70	181.60	-12.61%
Tata Motors Ltd	269.30	308.15	-12.61%
ICICI Bank Ltd	275.50	300.85	-8.43%
POWERGRID	186.65	197.85	-5.66%
State Bank of India	259.30	273.25	-5.11%

Nifty Gainers - Weekly

Scripts	This Week	Previous Week	Change
Bharti Infratel Ltd	300.55	286.00	5.09%
UltraTech Cement Ltd	3818.60	3641.05	4.88%
Infosys Ltd	1307.20	1247.85	4.76%
HINDALCO	230.50	222.00	3.83%
Vedanta Ltd	236.20	228.55	3.35%

Nifty Losers - Weekly

Scripts	This Week	Previous Week	Change
HINDPETRO	259.20	311.15	-16.70%
Tata Motors Ltd	269.30	308.00	-12.56%
BPCL	373.30	426.35	-12.44%
ICICI Bank Ltd	275.40	300.65	-8.40%
IOC	156.00	170.00	-8.24%

FII & DII Activities (Rs Crore) for the period of 22/06/2018 to 29/06/2018

Activities	FIIs	DIIs
Buy	36078.43	24691.40
Sell	34243.29	20644.03
Net	1835.14	4047.37

Market tumbles on weak global cues

Market tumbled last week as sentiment across the globe was negative on worries of escalating US-China trade war. Investors were concerned that trade tensions between the US and major trading partner such as China could develop into a big drag on the global economy. Trading was volatile as traders rolled over positions in the F&O segment from the near month June 2018 series to July 2018 series. The June 2018 F&O contracts expired on 28 June 2018. The Sensex fell 266.12 points or 0.75% to settle at 35,423.48. The Nifty 50 index fell 107.55 points or 0.99% to settle at 10,714.30. The BSE Mid-Cap index fell 388.71 points or 2.45% to settle at 15,450.90. The BSE Small-Cap index fell 507.69 points or 3.07% to settle at 16,032.15.

On the US economic data front, the US manufacturing PMI registered at 54.6 in June, down from 56.4 in May, while services PMI stood at 56.5, slightly down from 56.8 in May. A read on US consumer confidence fell to 126.4 in June from a revised 128.80 in May. The growth in the US economy in the first quarter was trimmed to 2% from 2.2%.

On global front, China's central bank will cut the amount of cash some lenders must hold as reserves, unlocking about 700 billion Yuan (\$108 billion) of liquidity, as it seeks to control leverage and support smaller companies. The required reserve ratio for some banks will drop by 0.5 percentage point, effective 5 July 2018, the People's Bank of China said. That's the day before the US and China are scheduled to impose tariffs on each other.

OPEC and its allied oil producers including Russia met on June 22 in Vienna for a two-day meeting. Saudi Arabia said the group had reportedly agreed on a nominal output rise of around 1 million barrels per day.

On NSE top gainer for the week was Bharti Infratel and top loser was Hindpetro. On BSE top gainer was Infosys. Infosys Finacle, part of EdgeVerve Systems, a fully owned subsidiary of Infosys, and Santander UK, a leading financial services provider in the UK, announced the launch of a new inter-bank cash management system for its corporate customers. Santander will utilize Finacle's proven digital offering which includes Finacle Online Banking, Omnichannel Hub, Payment Solution and Liquidity Management Solution to help achieve this, and to better support its customers. On the other hand top loser was Tata Motor DVR on BSE.

BSE midcap stocks were led by GSK consumer on the news that Coca-Cola is looking to buy GlaxoSmithKline's consumer nutrition business, which includes popular brand Horlicks. Top loser on the same was HPCL following the OPEC meet.

The sectoral indices was led by BSE IT while was due to Infosys. BSE FMCG was the second best performer for the week led by GSK.

On the contrary BSE Oil and BSE PSU were top losers on BSE due to HPCL.

Outlook and Technical View

Macroeconomic data will dictate trend on the bourses next week. Auto stocks will be in focus as the auto companies will start announcing monthly sales numbers for June 2018 starting from 1 July 2018.

From the technical standpoint, Nifty may find support at 10643, 10572 and 10532 while levels of 10754, 10794 and 10865 may act as resistance, with 10683 being the pivot point.

BSE Mid-Cap Gainers - Weekly

Scripts	This Week	Previous Week	Change
GlaxoSmith C H L	6524.45	6021.15	8.36%
Container Corpn.	653.75	622.15	5.08%
Petronet LNG	219.15	209.60	4.56%
Britannia Inds.	6196.40	5964.40	3.89%
Godrej Inds.	624.25	604.85	3.21%

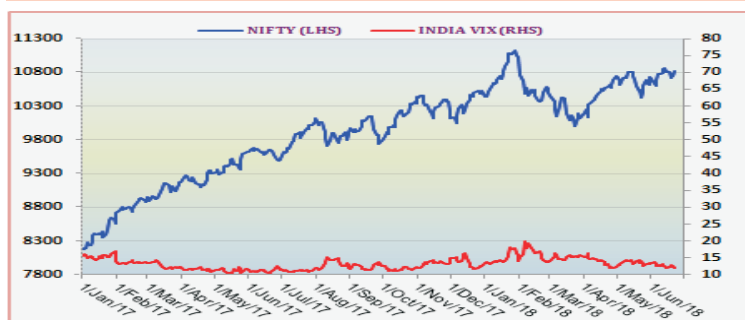
BSE Mid-Cap Losers - Weekly

Scripts	This Week	Previous Week	Change
H P C L	259.10	311.00	-16.69%
Videcon Inds.	7.90	9.12	-13.38%
Shriram Trans.	1298.95	1493.65	-13.04%
Adani Power	16.15	18.50	-12.70%
Bajaj Holdings	2888.10	3209.15	-10.00%

World Markets

KEY INDICES	This Week	Previous Week	Change
DJIA	24271.41	24580.89	-1.26%
Nasdaq	7510.30	7692.82	-2.37%
Nikkei 225	22304.51	22516.83	-0.94%
Straits Times	3268.70	3287.40	-0.57%
Hang Seng	28955.11	29338.70	-1.31%
FTSE 100	7636.93	7682.27	-0.59%
DAX	12306.00	12579.72	-2.18%
Shanghai Composite	2847.42	2889.76	-1.47%
JAKARTA	5799.24	5821.81	-0.39%
Bovespa (Brazil)	72762.51	70640.65	3.00%
MoeX (Russia)	2295.95	2249.68	2.06%
CAC 40	5323.53	5387.38	-1.19%

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	10689.95	10847.30	-1.45%	-24.35	263760	22717	1061.07%
BANKNIFTY	26-Jul-2018	26335.00	26800.00	-1.74%	-29.20	48241	4363	1005.68%

Cost of Carry

POSITIVE

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IFCI	14.85	15.00	26-Jul-18	14.18%
HINDZINC	274.50	276.80	26-Jul-18	11.76%
RCOM	13.75	13.85	26-Jul-18	10.21%
SUZLON	7.50	7.55	26-Jul-18	9.36%
RPOWER	32.00	32.20	26-Jul-18	8.77%
JPASSOCIAT	16.05	16.15	26-Jul-18	8.75%
ALBK	41.80	42.05	26-Jul-18	8.40%
KSCL	557.55	560.70	26-Jul-18	7.93%
GODFRYPHLP	726.25	730.35	26-Jul-18	7.93%
NIITTECH	1097.90	1104.05	26-Jul-18	7.86%
MGL	829.55	834.15	26-Jul-18	7.78%
MCX	731.05	735.10	26-Jul-18	7.78%
EQUITAS	135.85	136.60	26-Jul-18	7.75%

NEGATIVE

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
CHENNPETRO	304.05	291.25	26-Jul-18	-59.10%
INFRATEL	300.55	289.20	26-Jul-18	-53.01%
INFIBEAM	153.45	149.90	26-Jul-18	-32.48%
OFSS	4074.70	4004.95	26-Jul-18	-24.03%

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. Reliance Comm | 5. Jain Irrigation | 9. BHEL | 13. Power Finance |
| 2. IDBI Bank | 6. HFCL | 10. Dewan Housing | 14. Tech Mahindra |
| 3. Hind Constr | 7. Hindalco | 11. Yes Bank | 15. Jindal Steel |
| 4. SAIL | 8. Tata Steel | 12. Kwality | 16. Axis Bank |

PUT-CALL RATIO

Symbol	PUT	CALL	RATIO
NIFTY	55059525	37318300	1.48

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