

## MARKET WRAP UP

- Key benchmark indices ended almost unchanged after a volatile session of trade. The S&P BSE Sensex, dropped 0.49 points to settle at 33,812.26. The Nifty 50 index rose 6.65 points or 0.06% to settle at 10,442.20.
- The BSE Mid-Cap index fell 0.62%. The BSE Small-Cap index declined 0.63%. On BSE, 1,689 shares fell and 1,153 shares rose. A total of 112 shares were unchanged.

## DERIVATIVES WATCH

- Nifty January series futures witnessed a fresh short position build up. Open Interest has been increased by 7243 contracts at the end of the day.
- Long position build up for the January series has been witnessed in BHEL, TECHM, HDFCBANK.
- Short position build up for the January series has been witnessed in RELIANCE, SBIN, INFY.
- Unwinding of position for the January series has been witnessed in HDFC, HCLTECH, MINDTREE.

## CORPORATE NEWS

- Hero MotoCorp** reported a growth of 43% to sell 472,731 in December. The company had sold 330,202 units in the corresponding period of the last financial year. Exports comprise only 2.3% of total volumes.
- Tata Motors** reported 52.48% jump in total sales at 54,627 units in December. The company had sold 35,825 units in the same month previous year. Commercial vehicles sales from exports increased 26% year-on-year to 6,044 units in December 2017.
- Bajaj Auto** reported 29.72% increase in total sales in December at 2,92,547 units as against 2,25,529 units in the same month previous year. Exports stood at 1,43,038 units in the month as against 1,05,804 units in the same month previous year, a jump of 35.19%.
- Mahindra and Mahindra** reported 30.19% increase in total tractor sales at 18,288 units in December. The company had sold 14,047 units in December 2016.
- Ashok Leyland** reported a 79.41% jump in total sales at 19,253 units in December 2017. The company had sold 10,731 units in the same month last year.
- TVS Motor Company** registered 39% growth in sales at 256,909 units in the month of December 2017. It had sold 184,944 units in December 2016. The Company's total exports grew by 55.8% from 30,694 units registered in the month of December 2016 to 47,818 units in December 2017.
- Larsen & Toubro** said its construction arm has won contracts worth Rs 1,454 crore including one in Egypt.
- Thermax** has received an order worth Rs 327 crore for a boiler-turbine-generator (BTG) plant package from a public sector company based in western India for its up-coming chemical plant.
- Tata Power Renewable Energy Ltd** announced the commissioning of its 50 MW DCR solar plant at Pavagada Solar Park in the state.
- Prestige Group**, through its subsidiary, has concluded acquisition of CapitalLand's stake in its various special purpose vehicles for around Rs 342 crore.
- NMDC** has increased its prices for lump ore to Rs 3,100 per tonne up 19% mom. The company has also increased its prices for fines to Rs 2,760 per tonne up 6% mom. This price hike is the largest in the past 14 months.
- Ramco Systems** has secured an order from the world's largest and longest running aerial tour company, Papillon Grand Canyon Helicopters.
- NLC India** has commissioned its 130MW solar power project at Neyveli, Tamil Nadu.

## INDEX CHART



## GLOBAL NEWS

- China's Caixin PMI for the factory sector rose to 51.5 in December from 50.8 in November.
- U.K. IHS Markit/CIPS manufacturing PMI fell to 56.3 in December from November's 51-month high of 58.2.
- Eurozone factory PMI improved to 60.6 in December, from 60.1 in November.
- Germany's IHS Markit/BME manufacturing PMI rose to an all-time high of 63.3 in December from 62.5 in November.
- France's factory PMI rose to 58.8 in December from 57.7 in November.
- Italy's manufacturing headline PMI, dropped to 57.4 in December from 58.3 in November.
- Taiwan's headline Nikkei Manufacturing PMI rose to 56.6 in December from 56.3 in November.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 60.25/bbl (IST 17:00).
- INR strengthened to Rs. 63.48 from Rs. 63.68 against each US\$ resulting in daily change of 0.31%.
- India's eight core sectors grew by 6.8% in November 2017 from 5% in October. Cumulatively, the growth in the eight core sectors during April-November this fiscal slowed to 3.9% as against 5.3% in the same period last fiscal.
- India's Nikkei manufacturing PMI climbed to 54.7 in December from 52.6 in November.
- Telecom regulator Trai mandated service providers to enter into interconnection agreement "on non-discriminatory basis" within 30 days of receiving network connectivity request from another operator. Trai has prescribed a daily penalty of up to Rs 1 lakh per service area for operators violating the new norms.
- Tea production in the country suffered a decline in the month of November 2017 primarily due to crop loss stood at 10.04 million kg in November.

# DAILY ROUND-UP

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 03/01/2018

- Dynacons Systems & Solutions Limited Issue of Securities
- Sanwaria Consumer Limited Results/Others

## Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10442.20	10435.55	0.06%
S&P BSE SENSEX	33812.26	33812.75	0.00%
NIFTY MID100 FREE	20959.70	21109.80	-0.71%
NIFTY SML100 FREE	9108.90	9178.40	-0.76%

## Exchange Turnover

Market	Current	Previous
NSE Cash	31951.74	28341.05
NSE F&O	525119.01	294484.63

## Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	325.91	-
NET SELL	-	151.87

## Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	28589.22	28639.17	-0.17%
BSE IT	11192.03	11216.18	-0.22%
BSE CG	19111.98	19210.23	-0.51%
BSE OIL & GAS	16137.81	16207.75	-0.43%
BSE FMCG	10603.58	10664.49	-0.57%
BSE AUTO	26565.69	26542.64	0.09%
BSE HC	14703.17	14810.81	-0.73%
BSE POWER	2408.14	2400.41	0.32%
BSE METAL	14955.61	14861.39	0.63%

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TATAMOTORS	439.30	424.45	3.50%
TATAPOWER	99.70	97.15	2.62%
INFRATEL	378.80	369.95	2.39%
ONGC	196.85	192.35	2.34%
UPL	773.45	755.75	2.34%

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	CLOSED	CLOSED	-
HangSeng	30515.31	29919.15	1.99%
Straits Times	3430.30	3402.92	0.80%
Shanghai	3348.33	3307.17	1.24%
Kospi	2479.65	2467.49	0.49%
Jakarta	6339.24	6355.65	-0.26%
Taiwan	10710.73	10642.86	0.64%
KLSE Composite	1782.70	1796.81	-0.79%
All Ordinaries	6158.50	6167.30	-0.14%

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	28670.15	29893.15	-4.09%
IBULHSGFIN	1183.55	1218.15	-2.84%
BHARTIARTL	516.55	527.90	-2.15%
AUROPARMA	671.40	683.95	-1.83%
HINDPETRO	406.40	413.75	-1.78%

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