

## MARKET WRAP UP

- Stocks logged modest gains in a choppy session of trade. The S&P BSE Sensex, rose 114.19 points or 0.32% to settle at 35,378.60. The Nifty 50 index rose 42.60 points or 0.4% to settle at 10,699.90.
- The BSE Mid-Cap index rose 0.69%. The BSE Small-Cap index was rose 0.44%.

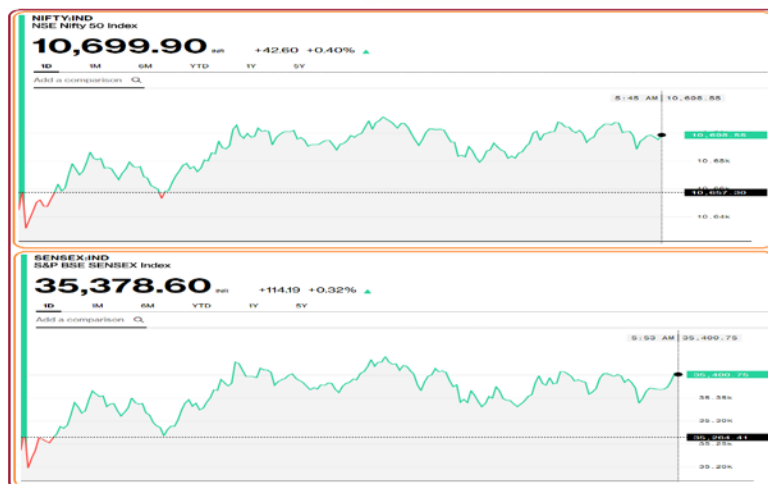
## DERIVATIVES WATCH

- Nifty July series futures witnessed a fresh long position build up. Open Interest has been increased by 14119 contracts at the end of the day.
- Long position build up for the July series has been witnessed in RELIANCE, HDFCBANK, INFY.
- Short position build up for the July series has been witnessed in SBIN, ICICIBANK, HDFC.
- Unwinding of position for the July series has been witnessed in ONGC, HINDPETRO.

## CORPORATE NEWS

- Hero MotoCorp** registered 13% growth in the June month sales number. The company has sold 7,04,562 unit of motorcycles and scooters in the month June 2018 against 6,24,185 units sold in June 2017. Also, it has sold over 2.1 million unit sales in the first quarter (April- June) of current financial year.
- Tech Mahindra** has partnered with New York City-based cybersecurity company LIFARS to offer advanced managed threat detection and response service for customers.
- Dr. Reddy's Laboratories** has announced that it has launched Repatha 140 mg/ml in India. This is the only PCSK9 Inhibitor available in India, approved by the Drug Controller General India (DCGI).
- Cadila Healthcare** has received final USFDA approval to market Nifedipine ER tablets in the strengths of 30/60/90 mg.
- Strides Shasun's** wholly owned subsidiary Strides Pharma Global Pte Ltd has received final approval for Ibuprofen tablets USP, 200 mg (OTC) from the United States Food & Drug Administration (USFDA).
- JSPL** reported a 36% rise in the domestic crude steel production to 1.23 million tonnes (MT) for the quarter ended June 30. The company had clocked production of 0.90 million tonnes in the year-ago period.
- Nestlé India** announced the launch of NesPlus a range of breakfast cereals for kids and adults alike. The breakfast cereals, called NesPlus, come in four multi-grain variants -- Kakos, Choco-Burst Fillows, Strawberry-Burst Fillows, and Nutty Honey Granola. A key characteristic of the product is that it remains crunchy in warm milk.
- The NGT has directed the NBCC to maintain the existing state of affairs and refrain from felling any trees till July 19. NBCC plans to cut 16,500 trees to make way for residential colonies in South Delhi.
- GPT Infraprojects** has won an order worth Rs83cr, that is a share of 34%, in a project valued at Rs245cr. The contract, which will be completed within 18 months, involves constructing a rail line connecting the Rooppur Nuclear Power Plant with other ancillary parks in Bangladesh.
- Manappuram Finance**, an NBFC, has entered into an agreement to acquire 85.39% stake in Indian School Finance Company (ISFC) for over Rs212cr.
- Kiri Industries** said that the Singapore Court directed Senda to purchase company's shareholding in DyStar and also dismissed all the claims and counterclaims against promoters.

## INDEX CHART



## GLOBAL NEWS

- U.S. seasonally adjusted IHS Markit final manufacturing PMI registered 55.4 in June, down from 56.4 in May.
- U.S. ISM said its manufacturing purchasing managers' index climbed to 60.2 in June after rising to 58.7 in May.
- U.K. IHS Markit/ CIPS factory PMI rose slightly to 54.4 in June from revised 54.3 in May.
- Eurozone retail sales remained unchanged in May, reversing a 0.1% fall logged in April. On a yearly basis, retail sales growth eased to 1.4% in May from 1.6% in the previous month.
- Eurozone factory PMI fell to an 18-month low of 54.9 in June from 55.5 in May.
- Germany's headline IHS Markit/BME PMI fell to an 18-month low of 55.9 in June, in line with flash estimate, from 56.9 in May.
- France's manufacturing PMI came in at 52.5 in June, down from the flash 53.1 and below May's 54.4.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 74.80/ bbl (IST 17:00).
- INR strengthened to Rs. 68.58 from Rs. 68.80 against each US\$ resulting in daily change of 0.32%.
- India's infrastructure sector slowed to a 10-month low in May, the Index of Eight Core Industries grew 3.6% in May compared with 4.6% in April and 3.9% a year earlier. For April-May, the index recorded a growth of 4.1% as against 3.3% in the same period last year.
- The Centre has announced a state-of-the-art e-waste recycling unit for Bengaluru, India's technology capital which produces an estimated one lakh tonne of electronic waste a year.
- India has agreed to provide tariff concessions on 3,142 products to the six member nations of the Asia Pacific Trade Agreement (APTA) effective from July 1.
- Solar tariffs touched Rs 2.44 per unit once more, the lowest they have ever reached, in the latest 2000 MW auction conducted by Solar Corporation of India (SECI). Acme Solar, one of the biggest domestic solar developers, with around 1700 MW of commissioned solar projects, won 600 MW with this bid.

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## FORTHCOMING EVENT

### CORPORATE ACTIONS AS ON 04/07/2018

• Havells India Limited	Dividend- Rs 4 Per Share
• Dabur India Ltd	Final Dividend- Rs 1.25 / Special Dividend- Rs 5 Per Share
• ICICI Lombard General Insurance Co Ltd	Dividend- Rs 2.50 Per Share
• Mayur Uniquoters Ltd	Dividend- Re 0.25 Per Share
• Sundaram Finance Holdings Ltd	Dividend- Rs 1.50 Per Share
• Sundaram Finance Limited	Dividend- Rs 7 Per Share
• 21st Century Management Services Ltd	Dividend Rs 2.50/- Per Share

## INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	10699.90	10657.30	0.40%
S&P BSE SENSEX	35378.60	35264.41	0.32%
NIFTY MID100 FREE	18229.80	18063.75	0.92%
NIFTY SML100 FREE	7180.50	7130.25	0.70%

## EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	24545.16	28641.58
NSE F&O	574868.04	563024.34

## PREVIOUS FII POSITIONS ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	445.10
NET SELL	1205.12	-

## SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	29124.81	29180.77	-0.19%
BSE IT	14192.93	14043.04	1.07%
BSE CG	17340.75	17352.44	-0.07%
BSE OIL & GAS	13655.67	13549.72	0.78%
BSE FMCG	11197.62	11140.55	0.51%
BSE AUTO	24013.95	23775.16	1.00%
BSE HC	14212.29	13961.03	1.80%
BSE POWER	1916.01	1913.68	0.12%
BSE METAL	12794.82	12829.41	-0.27%

## TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
CIPLA	640.40	617.00	3.79%
SUNPHARMA	573.60	563.15	1.86%
BAJAJFINSV	5885.20	5778.30	1.85%
MARUTI	8975.15	8821.05	1.75%
LUPIN	903.10	889.45	1.53%

## ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	21785.54	21811.93	-0.12%
HangSeng	28545.57	28955.11	-1.41%
Straits Times	3235.90	3238.94	-0.09%
Shanghai	2786.89	2775.56	0.41%
Kospi	2272.76	2271.54	0.05%
Jakarta	5633.94	5746.77	-1.96%
Taiwan	10715.72	10777.94	-0.58%
KLSE Composite	1680.37	1685.05	-0.28%
All Ordinaries	6302.80	6273.30	0.47%

## TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
VEDL	231.05	239.85	-3.67%
INFRATEL	291.50	298.90	-2.48%
ICICIBANK	272.90	277.40	-1.62%
HDFC	1879.70	1897.10	-0.92%
ULTRACEMCO	3749.85	3777.30	-0.73%

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