

## MARKET WRAP UP

- Stocks rallied jumped on last trading day of the week as index pivots staged a comeback after two-day slide. The barometer index, S&P BSE Sensex, surged 391 points or 1.05% to settle at 37,556.16. The Nifty 50 index surged 116.10 points or 1.03% to 11,360.80. Gains caught momentum after the weather department forecast a recovery in monsoon in August and September.
- Among secondary barometers, the BSE Mid-Cap index rose 0.93%, underperforming the Sensex. The BSE Small-Cap index rose 1.16%, outperforming the Sensex.

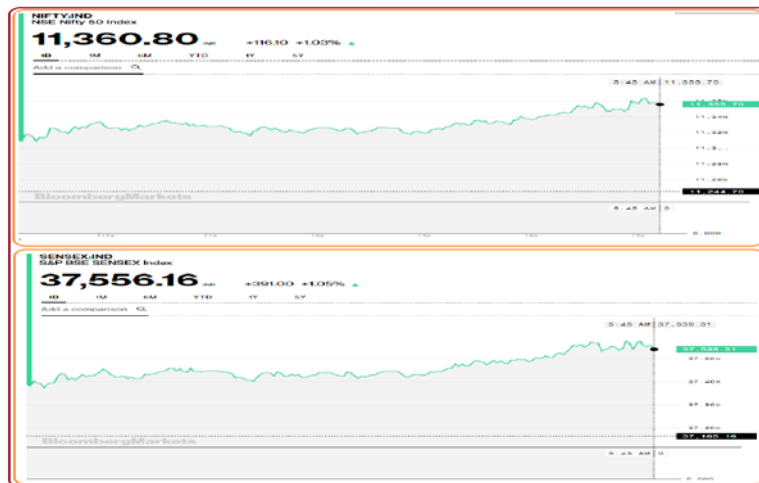
## DERIVATIVES WATCH

- Nifty August series futures witnessed a long short position build up. Open Interest has been increased by 15564 contracts at the end of the day.
- Long position build up for the August series has been witnessed in ICICIBANK, SUNPHARMA, AXISBANK, IBULHSGFIN, ITC
- Short position build up for the August series has been witnessed in HDFCBANK, TATAMOTORS
- Unwinding of position for the August series has been witnessed HDFC

## CORPORATE NEWS

- Oil and Natural Gas Corporation** reported a rise of 4% in net profit for the June quarter at Rs 6,143 crore against Rs 5,915.2 crore during the previous quarter. The company's revenues rose 14% at Rs 27,212 crore against Rs 23,970 crore on a quarter on quarter basis.
- Titan** reported 31% increase in its net profit for the June quarter at Rs 349.2 crore against Rs 266.9 crore during the same quarter of last year. The company's revenue rose 8% at Rs 4,319 crore against Rs 3,992 crore year on year.
- Indiabulls Housing Finance** has reported a consolidated total income from operations of Rs 3,890.27 crore and a net profit of Rs 1,054.72 crore for the quarter ended Jun-2018. For the quarter ended Jun 2017 the consolidated total income from operations was Rs 2,955.99 crore and net profit was Rs 788.22 crore.
- Nestle India's** Q2 net profit rose 49.5% year-on-year (YoY) to Rs 395 crore in the second quarter of calendar 2018. The company that follows January-December financial year reported a 12.3% YoY rise in net sales at Rs 2,698.4 crore helped by volume growth.
- Narayana Hrudayalaya** has reported a standalone total income from operations of Rs 482.63 crore and a net profit of Rs 0.54 crore for the quarter ended Jun-2018. For the quarter ended Jun 2017 the standalone total income from operations was Rs 441.09 crore and net profit was Rs 19.37 crore.
- Ramco System** has reported a consolidated total income from operations of Rs 125.63 crore and a net profit of Rs 6.71 crore for the quarter ended Jun-2018. For the quarter ended Mar 2018 the consolidated total income from operations was Rs 118.58 crore and net profit was Rs 4.30 crore.
- Torrent Pharmaceuticals** has reported a consolidated total income from operations of Rs 1,872.00 crore and a net profit of Rs 163.00 crore for the quarter ended Jun-2018. For the quarter ended Jun 2017 the consolidated total income from operations was Rs 1,374.00 crore and net profit was Rs 188.00 crore.
- Capital First** has reported a consolidated total income from operations of Rs 1,045.41 crore and a net profit of Rs 101.52 crore for the quarter ended Jun-2018. Other income for the quarter was Rs -0.21 crore. For the quarter ended Jun 2017 the consolidated total income from operations was Rs 808.83 crore and net profit was Rs 66.96 crore, and other income Rs -0.21 crore.

## INDEX CHART



## GLOBAL NEWS

- China Caixin services sector continued to expand in July, with a PMI score of 52.8. That's down from 53.9 in June.
- U.S. initial jobless claims inched up to 218,000 in the week ended July 28th, an uptick of 1,000 from the previous week's unrevised level of 217,000. Continuing claims fell by 23,000 to 1.724 million in the week ended July 21st.
- U.S. factory orders climbed by 0.7% in June after rising by an unrevised 0.4% in May.
- Bank of England lifted its key benchmark rate by a quarter point to bring inflation sustainably to the target, the Monetary Policy Committee unanimously decided to lift the benchmark rate by 25 basis points to 0.75%. The bank had earlier hiked its rate by 25 basis points in November 2017. The MPC voted 9-0 to maintain the quantitative easing at GBP 435 billion.
- Eurozone retail sales grew at a steady pace of 0.3% on month in June driven by food sales. Year-on-year, retail sales growth eased to 1.2% from 1.6% a month ago.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 69.15/ bbl (IST 17:00).
- INR strengthened to 68.6250 Rs from Rs. 68.70 against each US\$ resulting in daily change of 0.11%.
- India's headline Nikkei Services PMI climbed to 54.2 in July from 52.6 in June. The Nikkei Composite Output Index rose to a 21-month high of 54.1 in July from 53.3 in the prior month.
- The government is ready, if required, to make further changes to the Insolvency and Bankruptcy Code.
- The government may scale down the manufacturing component in manufacturing-linked solar tender to around 3 gigawatts, fearing developers may quote high tariffs that will make it unviable for distribution companies to buy power from these projects.
- Niti Aayog will soon pilot a cabinet note that seeks to make it mandatory for passenger vehicles to run on petrol blended with 15% methanol. If approved by the cabinet, this move will result in an at least 10% reduction in monthly petrol bills and help the government to substantially cut down its oil import bill.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 04/08/2018

• Divi's Laboratories Limited	Financial Results
• Relaxo Footwears Limited	Financial Results
• Wockhardt Limited	Financial Results
• Aarti Industries Limited	Financial Results
• Action Construction Equipment Limited	Financial Results
• JSW Holdings Limited	Financial Results
• Suzlon Energy Limited	Financial Results
• Thyrocare Technologies Limited	Buyback

### BOARD MEETINGS AS ON 05/08/2018

• PI Industries Limited	Financial Results
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### BOARD MEETINGS AS ON 06/08/2018

• Adani Ports and Special Economic Zone Ltd	Financial Results
• Britannia Industries Limited	Financial Results
• Firstsource Solutions Limited	Financial Results
• Arvind Limited	Financial Results

• Dixon Technologies (India) Limited	Financial Results
• Graphite India Limited	Financial Results
• Max Financial Services Limited	Financial Results
• Monsanto India Limited	Financial Results
• Parag Milk Foods Limited	Financial Results/Other business matters
• Syndicate Bank	Financial Results
• Alphageo (India) Limited	Financial Results

### CORPORATE ACTIONS AS ON 06/08/2018

• Godrej Consumer Products Limited	Interim Dividend-Rs 2/- Per Share
• Bayer Cropscience Limited	Dividend Rs 18/- Per Share
• Cochin Shipyard Limited	Dividend- Rs 12 Per Share
• KRBL Limited	Dividend- Rs 2.30 Per Share
• Monsanto India Limited	Dividend- Rs 15 Per Share
• Nelcast Limited	Dividend- Re 1 Per Share
• Sanofi India Limited	Interim Dividend -Rs 18 Per Share
• Tide Water Oil Company (India) Limited	Dividend- Rs 100 Per Share

## INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	11360.80	11244.70	1.03%
S&P BSE SENSEX	37556.16	37165.16	1.05%
NIFTY MID100 FREE	19112.70	18926.45	0.98%
NIFTY SML100 FREE	7581.75	7475.60	1.42%

## EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	32611.91	30888.32
NSE F&O	4,72,158.52	1444021.12

## PREVIOUS FII POSITIONS ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	1975.44
NET SELL	639.87	-

## SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	31079.29	30576.54	1.64%
BSE IT	14604.43	14497.23	0.74%
BSE CG	18304.88	18180.13	0.69%
BSE OIL & GAS	15206.15	15154.29	0.34%
BSE FMCG	12157.38	12061.06	0.80%
BSE AUTO	24121.10	24001.66	0.50%
BSE HC	14674.96	14511.47	1.13%
BSE POWER	1991.73	1981.09	0.54%
BSE METAL	12803.28	12614.68	1.50%

## TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
Indiabulls Hsg	1377.50	1298.55	6.08%
Axis Bank	574.75	547.25	5.03%
Vedanta	222.40	214.15	3.85%
Yes Bank	373.2	361.8	3.15%
GAIL	388.2	377.65	2.79%

## ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	22525.18	22512.53	0.06%
HangSeng	27676.32	27714.56	-0.14%
Straits Times	3265.73	3286.32	-0.63%
Shanghai	2740.44	2768.02	-1.00%
Kospi	2287.68	2270.20	0.77%
Jakarta	6007.54	6011.72	-0.07%
Taiwan	11012.43	10929.77	0.76%
KLSE Composite	1780.09	1778.13	0.11%
All Ordinaries	6326.40	6327.70	-0.02%

## TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
Tech Mahindra	662.75	669.00	-0.93%
Tata Motors	258.45	260.85	-0.92%
Grasim	1006.2	1014.2	-0.79%
Asian Paints	1411.85	1418.4	-0.46%
HDFC Bank	2121.65	2130.2	-0.40%

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