

## MARKET WRAP UP

- Key benchmarks ended volatile trading session with modest gains, supported by firmness in index pivotals. The S&P BSE Sensex, rose 113.31 points or 0.31% to settle at 36,582.74. The Nifty 50 index rose 18.60 points or 0.17% to settle at 10,912.25. The Nifty settled above 10,900 mark.
- The BSE Mid-Cap index fell 0.82%. The BSE Small-Cap index fell 1.17%.

## DERIVATIVES WATCH

- Nifty February series futures witnessed a fresh long position build up. Open Interest has been increased by 10959 contracts at the end of the day.
- Long position build up for the February series has been witnessed RELIANCE, BHEL, ONGC, ICICIBANK, HDFC.
- Short position build up for the February series has been witnessed in INFY, MARICO.
- Unwinding of position for the September series has been witnessed SBIN, HD-FCBANK.

## CORPORATE NEWS

- Whirlpool of India** reported 14% increase in profit after tax at Rs 60.62 crore in the third quarter ended December 31, 2018. The company had posted profit after tax of Rs 53.14 crore in the same period last fiscal. Total income during the third quarter was at Rs 1,238.41 crore as against Rs 979.26 crore a year-ago.
- IRB Infrastructure Developers** has posted 5.5% jump in its third quarter (Q3FY19) net profit at Rs 218.9 crore against Rs 207.3 crore in a year ago period. Revenue jumped 38% to Rs 1,788.5 crore versus Rs 1,296.2 crore.
- Insecticides India** reported 75% increase in net profit at Rs 16.89 crore for December 2018 quarter. Its net profit stood at Rs 9.64 crore in the year-ago period. Total income rose to Rs 216.59 crore during third quarter of this fiscal from Rs 175.78 crore in the corresponding period of the previous year.
- GlaxoSmithKline Pharmaceuticals** posted net sales at Rs 825.35 crore in December 2018 up 17.25% from Rs. 703.91 crore in December 2017. Net profit at Rs. 112.97 crore in December 2018 up 25.96% from Rs. 89.69 crore in December 2017.
- Capacite Infraprojects** posted net sales at Rs 449.38 crore in December 2018 up 22.62% from Rs. 366.50 crore in December 2017. Net profit at Rs. 23.90 crore in December 2018 up 5.32% from Rs. 22.69 crore in December 2017.
- Firstsource Solutions** posted consolidated net sales at Rs 985.24 crore in December 2018 up 11.05% from Rs. 887.24 crore in December 2017. Net profit at Rs. 98.13 crore in December 2018 down 1.43% from Rs. 99.56 crore in December 2017.
- J. K. Cement** posted net sales at Rs 1,273.19 crore in December 2018 up 13.06% from Rs. 1,126.11 crore in December 2017. Net profit at Rs. 60.91 crore in December 2018 down 16.49% from Rs. 72.93 crore in December 2017.
- Central Bank of India** posted NII at Rs 1,816.05 crore in December 2018 down 8.16% from Rs. 1,977.42 crore in December 2017. Net loss at Rs. 718.23 crore in December 2018 up 56.84% from Rs. 1,664.22 crore in December 2017.
- Jindal Steel & Power** posted net sales at Rs 6,730.93 crore in December 2018 up 57.55% from Rs. 4,272.12 crore in December 2017. Net profit at Rs. 176.61 crore in December 2018 up 339.5% from Rs. 73.74 crore in December 2017.
- AXISCADES Engineering Technologies** posted net sales at Rs 62.89 crore in December 2018 up 0.23% from Rs. 62.75 crore in December 2017. Net profit at Rs. 0.52 crore in December 2018 up 134.63% from Rs. 1.51 crore in December 2017.
- Divis Laboratories** posted net sales at Rs 1,342.92 crore in December 2018 up 29.39% from Rs. 1,037.88 crore in December 2017. Net profit at Rs. 379.49 crore in December 2018 up 68.92% from Rs. 224.66 crore in December 2017.

## INDEX CHART



## GLOBAL NEWS

- China's Caixin/Markit services PMI fell slightly to 53.6 in January from 53.9 in December.
- U.S. non-farm payroll employment surged up by 304,000 jobs in January compared to economist estimates for an increase of about 165,000 jobs. The unemployment rate unexpectedly inched up to 4.0% in January from 3.9% in December.
- U.S. seasonally adjusted IHS Markit final manufacturing PMI posted 54.9 in January, up from 53.8 in December.
- U.S. ISM said its purchasing managers index climbed to 56.6 in January from a revised 54.3 in December.
- U.S. consumer sentiment index for January was upwardly revised to 91.2 from the preliminary reading of 90.7.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 55.29/ bbl (IST 17:00).
- INR weakened to Rs. 71.80 from Rs. 71.24 against each US\$ resulting in daily change of 0.79%.
- India's exports in the current fiscal year are expected to surpass the earlier peak of USD 314 billion in 2013-14. This year, we are very confident that we will go past our earlier peak, our earlier peak of 2013-14. We will go past that peak quite comfortably this year," Union Commerce Secretary Anup Wadhawan told reporters here. The earlier peak was 314 billion, he said.
- Fiscal deficit for the month April- December has widened to Rs 7.01 lakh crore compared to Rs 6.20 lakh crore in the previous year. Revenue deficit for the same period compared to the preceding year stood at Rs 5.36 lakh crore. Revenue spends for April-December has also increased to Rs 16.2 lakh crore against Rs 14.62 lakh crore in the previous year.
- To protect domestic players from cheap imports, India has imposed anti-dumping duty on as many as 99 Chinese products as on January 28 this year.
- Foreign direct investment (FDI) into India has declined 11 per cent to USD 22.66 billion during April-September period of the current fiscal, according to commerce and industry ministry data. The foreign fund inflows during April-September 2017-18 stood at USD 25.35 billion.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 05/02/2019

Tech Mahindra Limited	Financial Results
GAIL (India) Limited	Financial Results
ACC Limited	Financial Results
Marico Limited	Financial Results/Dividend
Apollo Tyres Limited	Financial Results/Dividend
Bharat Heavy Electricals Limited	Financial Results/Dividend
CESC Limited	Financial Results/Dividend
Tata Chemicals Limited	Financial Results
Tata Global Beverages Limited	Financial Results
Punjab National Bank	Financial Results
DLF Limited	Financial Results
Sobha Limited	Financial Results
Torrent Power Limited	Financial Results/Fund Raising
V-Mart Retail Limited	Financial Results
Future Enterprises Limited	Financial Results/Fund Raising

Suven Life Sciences Limited	Financial Results/Dividend
Hindustan Petroleum Corp Ltd	Financial Results/Dividend
IDFC First Bank Limited	Financial Results
Birla Corporation Limited	Financial Results
Blue Star Limited	Financial Results
Bombay Dyeing & Mfg Company Limited	Financial Results
Dish TV India Limited	Financial Results
Ador Welding Limited	Financial Results
INOX Leisure Limited	Financial Results
Jai Corp Limited	Financial Results
JBF Industries Limited	Financial Results
LT Foods Limited	Financial Results
Brigade Enterprises Limited	Financial Results

### CORPORATE ACTIONS AS ON 05/02/2019

Godrej Consumer Products Limited	Interim Dividend - Rs 2 Per Share
HCL Technologies Limited	Interim Dividend - Rs 2 Per Share

## INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	10912.25	10893.65	0.17%
S&P BSE SENSEX	36582.74	36469.43	0.31%
NIFTY MID100 FREE	16840.00	16990.25	-0.88%
NIFTY SML100 FREE	6043.75	6138.90	-1.55%

## EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	29790.53	40624.46
NSE F&O	608670.41	914497.31

## PREVIOUS FII POSITIONS ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	1315.89	2526.41
NET SELL	-	-

## SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	30473.65	30412.15	0.20%
BSE IT	15452.04	15433.98	0.12%
BSE CG	17261.06	17462.98	-1.16%
BSE OIL & GAS	13698.48	13633.78	0.47%
BSE FMCG	11671.29	11748.28	-0.66%
BSE AUTO	18882.46	18985.17	-0.54%
BSE HC	13816.61	13997.30	-1.29%
BSE POWER	1847.67	1887.82	-2.13%
BSE METAL	10471.62	10542.63	-0.67%

## TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
TITAN	1025.75	991.55	3.45%
RELIANCE	1290.90	1249.95	3.28%
ONGC	146.25	141.80	3.14%
EICHERMOT	20128.30	19663.40	2.36%
BAJAJ-AUTO	2642.50	2602.75	1.53%

## ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	20883.77	20788.39	0.46%
HangSeng	27990.21	27930.74	0.21%
Straits Times	3184.56	3188.68	-0.13%
Shanghai	CLOSED	2618.23	-
Kospi	CLOSED	2203.46	-
Jakarta	6481.45	6538.64	-0.87%
Taiwan	CLOSED	CLOSED	-
KLSE Composite	1683.61	1683.53	0.005%
All Ordinaries	5963.00	5935.30	0.47%

## TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
IBULHSGFIN	650.75	678.65	-4.11%
HINDALCO	204.20	211.40	-3.41%
HINDPETRO	226.50	234.00	-3.21%
YESBANK	179.80	185.60	-3.12%
POWERGRID	184.60	190.20	-2.94%

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