

MARKET WRAP UP

- Domestic stocks logged sharp losses on first trading day of the week on negative global cues. The S&P BSE Sensex, lost 309.59 points or 0.88% to settle at 34,757.16. The Nifty 50 index declined 94.05 points or 0.87% to settle at 10,666.55. The Sensex settled below the psychological 35,000 level after slipping below that level in intra-day trade. Key indices registered losses for fifth straight session today, 5 February 2018. Global stocks declined after a stronger-than-expected US jobs report sent bond yields surging.
- The S&P BSE Mid-Cap index fell 0.09%. The S&P BSE Small-Cap index fell 0.37%.

DERIVATIVES WATCH

- Nifty February series futures witnessed an unwinding of short position. Open Interest has been decreased by 3718 contracts at the end of the day.
- Long position build up for the February series has been witnessed in BHARTIARTL, AXISBANK, TATAMOTORS.
- Short position build up for the February series has been witnessed in ICICIBANK, HDFC, INFY.
- Unwinding of position for the February series has been witnessed in RELIANCE, SBIN, HDFCBANK.

CORPORATE NEWS

- Tata Motors'** third quarter consolidated profit growth of nearly 11-fold year-on-year at Rs 1,215 crore for December quarter. Profit for the year-ago period stood at Rs 111.6 crore. Consolidated revenue from operations grew by 16% to Rs 74,156 crore compared to Rs 63,933 crore in December quarter 2016. Profit for the quarter stood at Rs 170.6 crore, increased from Rs 127.8 crore in previous year. Revenue from operations during the quarter grew by 18.2% to Rs 1,033.3 crore compared to Rs 874.6 crore in corresponding quarter of last fiscal.
- Colgate Palmolive** has reported profit for the quarter stood at Rs 170.6 crore, increased from Rs 127.8 crore in previous year. Revenue from operations during the quarter grew by 18.2% to Rs 1,033.3 crore compared to Rs 874.6 crore in corresponding quarter of last fiscal.
- Bosch Ltd** reported a 28.78% increase in its net profit at Rs 281 crore for the quarter ended December 2017, on account of higher income. The company had posted a net profit of Rs 218.19 crore during the same period of the previous fiscal. Total income during the quarter under review stood at Rs 3,174.18 crore. It was Rs 3,027.15 crore in the corresponding quarter of the last fiscal.
- Eveready Industries India** reported 40.49% decline in net profit at Rs 20.94 crore for the quarter ended December 31. The battery maker had posted a net profit of Rs 35.19 crore during the year-ago period. Total income during the quarter under review stood at Rs 373.80 crore. It was Rs 346.90 crore in the December quarter of 2016-17.
- Procter & Gamble Hygiene and Health Care** reported a 13% decline in the net profit at Rs 131 crore for the December quarter. The net profit of the FMCG company was Rs 150.62 crore in the corresponding quarter of the last fiscal. Total income of the company rose to Rs 711 crore during the quarter ended December 2017, from Rs 686 crore in the same quarter of the previous fiscal.
- Union Bank of India** posted net loss of Rs 1,250 crore for December quarter against profit of Rs 104 crore in previous year. Net interest income, the difference between interest earned and interest expended, grew by 19.3% to Rs 2,548.3 crore compared to Rs 2,136.6 crore in same quarter last year.
- J K Cement** reported a 9.76% growth in net profit at Rs 72.93 crore for the October-December quarter compared to Rs 66.44 crore in the same quarter of last year. Total income was Rs 1,151 crore during the three-month period as against Rs 1,083 crore in the same period of previous fiscal

INDEX CHART



GLOBAL NEWS

- China's Caixin composite output index climbed to 53.7 in January from 53.0 in December. The seasonally adjusted General Services Business Activity Index rose to 54.7 in January from 53.9 in the preceding month.
- U.S. non-farm payroll employment surged up by 200,000 jobs in January after climbing by an upwardly revised 160,000 jobs in December. Additionally, the private sector created more new job contracts than expected in January with a total of 196,000. The unemployment rate came in at 4.1% in January, unchanged from the three previous months.
- U.S. consumer sentiment index for January was upwardly revised to 95.7 from the preliminary reading of 94.4.
- U.S. factory orders surged up by 1.7% in December, matching the upwardly revised jump seen in November.

ECONOMIC NEWS

- Crude Oil traded at US\$ 65.23/bbl (IST 17:00).
- INR weakened to Rs. 64.06 from Rs. 63.05 against each US\$ resulting in daily change of 0.02%.
- Indian headline Nikkei Services PMI rose to 51.7 in January from 50.9 in December. The Nikkei Composite Output Index dropped to 52.5 in January from 53.0 in the preceding month.
- The food ministry has proposed doubling of the import duty on sugar to 100% to curb cheaper imports, check falling wholesale prices of sweetener and ensure timely payment to cane farmers. Wholesale prices have fallen below the cost of production in view of estimated 6 million tonnes more production in the 2017-18 season (October-September). In retail market, sugar is being sold at Rs 40-42/kg.
- India's gold imports in January dropped to their lowest in 17 months as prices rebounded and buyers postponed purchases in expectation of cuts in the import tax, provisional data from precious metals consultancy GFMS and bank dealers showed. The drop in purchases by India, the world's second-biggest consumer of gold after China, could weigh on global prices, which have risen over 7% in eight weeks.

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 06/02/2018

• Hero MotoCorp Limited	Results/Dividend
• Lupin Limited	Results
• Siemens Limited	Results
• Rural Electrification Corporation Ltd	Results/Dividend
• Natco Pharma Limited	Results/Dividend
• Tata Chemicals Limited	Results
• The Ramco Cements Limited	Results
• Thermax Limited	Results
• Polaris Consulting & Services Ltd	Results/Others
• Praj Industries Limited	Results
• JSW Energy Limited	Results
• KEC International Limited	Results
• Apollo Tyres Limited	Results
• Berger Paints (I) Limited	Results

• Blue Star Limited	Results
• Castrol India Limited	Results/Dividend
• Dish TV India Limited	Results
• Future Retail Limited	Results
• Oracle Financial Services Software Ltd	Results
• Gujarat State Fertilizers & Chemicals Ltd	Results
• Punjab National Bank	Results
• Rane Holdings Limited	Results/Dividend
• AIA Engineering Limited	Results
• Bank of Maharashtra	Results

CORPORATE ACTIONS AS ON 06/02/2018

• Container Corporation of India Limited	Interim Dividend - Rs 9.60 Per Share
• Godrej Consumer Products Limited	Interim Dividend -Re 1/- Per Share
• Suven Life Sciences Limited	Interim Dividend - Rs 1.50 Per Share
• VIP Industries Limited	Interim Dividend - Re 1 Per Share

Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10666.55	10760.60	-0.87%
S&P BSE SENSEX	34757.16	35066.75	-0.88%
NIFTY MID100 FREE	19721.65	19760.35	-0.20%
NIFTY SML100 FREE	8313.65	8251.00	0.76%

Exchange Turnover

Market	Current	Previous
NSE Cash	36898.47	47472.98
NSE F&O	589594.95	724402.25

Previous FII Positions (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	950.00	-
NET SELL	-	38.68

Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	29576.80	29910.23	-1.11%
BSE IT	12457.90	12494.67	-0.29%
BSE CG	19410.47	19939.32	-2.65%
BSE OIL & GAS	15670.89	15667.65	0.02%
BSE FMCG	10705.80	10684.86	0.20%
BSE AUTO	25397.79	25213.33	0.73%
BSE HC	14075.04	14067.60	0.05%
BSE POWER	2244.37	2229.25	0.68%
BSE METAL	14928.36	15011.79	-0.56%

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BHARTIARTL	440.20	422.35	4.23%
TATAMOTORS	395.80	383.75	3.14%
HINDPETRO	383.85	374.50	2.50%
BOSCHLTD	19951.55	19474.40	2.45%
POWERGRID	196.50	192.90	1.87%

Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	22682.08	23274.53	-2.55%
HangSeng	32245.22	32601.78	-1.09%
Straits Times	3482.93	3529.82	-1.33%
Shanghai	3487.50	3462.08	0.73%
Kospi	2491.75	2525.39	-1.33%
Jakarta	6589.67	6628.82	-0.59%
Taiwan	10946.25	11126.23	-1.62%
KLSE Composite	1853.07	1870.48	-0.93%
All Ordinaries	6128.40	6229.80	-1.63%

Top Losers

SCRIP NAME	Close	Previous	Change (%)
HDFC	1823.35	1903.85	-4.23%
LT	1363.65	1415.45	-3.66%
INDUSINDBK	1713.00	1761.30	-2.74%
ADANI PORTS	408.20	417.95	-2.33%
KOTAKBANK	1062.25	1085.95	-2.18%

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