

## MARKET WRAP UP

- Key benchmark indices rose for a fifth straight session led by gains in index pivots. The S&P BSE Sensex, rose 358.42 points or 0.98% to settle at 36,975.23. The Nifty 50 index rose 128.10 points or 1.17% to settle at 11,062.45. The Nifty provisionally ended above the psychologically important 11,000 mark after crossing that level in early trade.
- The BSE Mid-Cap index fell 0.12%. The BSE Small-Cap index rose 0.05%.

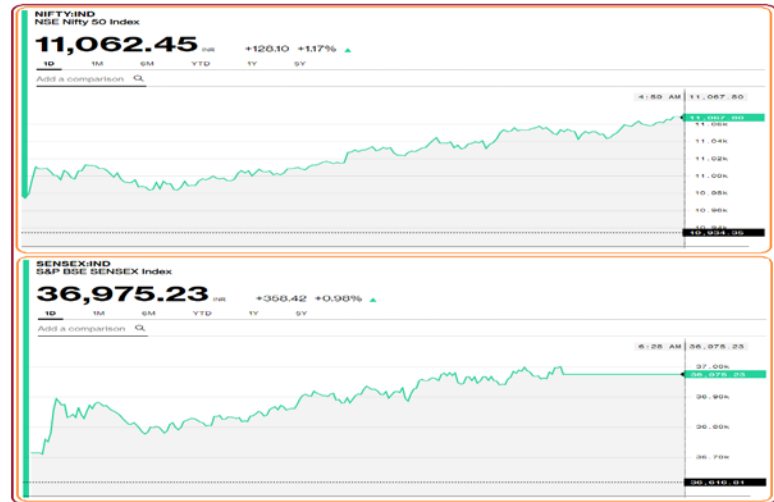
## DERIVATIVES WATCH

- Nifty February series futures witnessed a fresh long position build up. Open Interest has been increased by 41116 contracts at the end of the day.
- Long position build up for the February series has been witnessed RELIANCE, SBIN, ICICIBANK, HDFCBANK, HDFC, INFY.
- Short position build up for the February series has been witnessed in VOLTAS, EXIDEIND, TORNTPOWER.
- Unwinding of position for the September series has been witnessed TATAMOTORS, TVSMOTOR.

## CORPORATE NEWS

- Tech Mahindra** reported a 13% sequential rise in Q3 profit at Rs 1,203 crore. The company reported 27.5% year-on-year (YoY) rise in consolidated net profit. The revenue for the quarter rose 3.6% against the September quarter to Rs 8,944 crore.
- Lupin** posted consolidated net sales at Rs 4,504.87 crore in December 2018 up 13.31% from Rs. 3,975.62 crore in December 2017. Net loss at Rs. 151.75 crore in December 2018 down 168.44% from Rs. 221.73 crore in December 2017.
- Cipla** reported a drop of 17% (year on year) in its profit for the December quarter at Rs 332.2 crore against Rs 400.5 crore posted last year. Consolidated revenue rose over 2% at Rs 4,077.5 crore against Rs 3,914 crore in Q3FY19.
- Siemens** posted net sales at Rs 2,807.10 crore in December 2018 up 15.54% from Rs. 2,429.50 crore in December 2017. Net profit at Rs. 228.00 crore in December 2018 up 19.69% from Rs. 190.50 crore in December 2017.
- Sobha** posted net sales at Rs 797.80 crore in December 2018 up 13.97% from Rs. 700.00 crore in December 2017. Net profit at Rs. 69.80 crore in December 2018 up 30.71% from Rs. 53.40 crore in December 2017.
- DLF** posted net sales at Rs 924.34 crore in December 2018 up 83.79% from Rs. 502.94 crore in December 2017. Net profit at Rs. 204.22 crore in December 2018 up 447.49% from Rs. 58.77 crore in December 2017.
- Graphite India** posted consolidated net sales at Rs 1,855.00 crore in December 2018 up 80.98% from Rs. 1,024.98 crore in December 2017. Net profit at Rs. 764.00 crore in December 2018 up 112.81% from Rs. 359.00 crore in December 2017.
- Vardhman Textiles** posted consolidated net sales at Rs 1,729.44 crore in December 2018 up 4.94% from Rs. 1,647.98 crore in December 2017. Net profit at Rs. 195.77 crore in December 2018 up 44.45% from Rs. 135.53 crore in December 2017.
- Adani Power** posted consolidated net sales at Rs 6,380.33 crore in December 2018 up 31.7% from Rs. 4,844.46 crore in December 2017. Net loss at Rs. 1,180.78 crore in December 2018 up 8.52% from Rs. 1,290.74 crore in December 2017.
- Wheels India** has recorded a 18.6% rise in net profits for the third quarter ending December 31, 2018 at Rs 15.3 crore. The city-based TVS Group company clocked net profits at Rs 12.9 crore in the corresponding quarter last year. Revenues for the October-December 2018 quarter went up 32.7% to Rs 786 crore from Rs 591.9 crore registered year ago.
- IDBI Bank's** third quarter loss widened sharply to Rs 4,185 crore, nearly 3-fold increase compared to loss of Rs 1,524 crore posted a year-ago due to higher provisions. NII fell by 18.5% year-on-year to Rs 1,357 crore in quarter ended December 2018 with 17% degrowth in loans.

## INDEX CHART



## GLOBAL NEWS

- U.S. seasonally adjusted final IHS Markit services PMI registered 54.2 in January, down slightly from 54.4 in December. The Composite PMI Output Index posted 54.4 in January, matching that seen in December.
- U.S. ISM said its non-manufacturing index fell to 56.7 in January from an upwardly revised 58.0 in December.
- Germany's factory orders decreased a calendar and seasonally adjusted 1.6% for a second straight month in December from the previous month, while they were forecast to rise 0.3%.
- Germany headline seasonally adjusted IHS Markit services PMI ticked up in January, at 53.0, from 51.8 in December. The composite output PMI recovered slightly from December's five-and-a-half year low of 51.6 to 52.1 in January.
- France headline seasonally adjusted IHS Markit services PMI fell to 47.8 in January, down from 49.0 in December. The composite output index posted at 48.2 in January, a decline from 48.7 in December.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 53.29/ bbl (IST 17:00).
- INR strengthened to Rs. 71.55 from Rs. 71.56 against each US\$ resulting in daily change of 0.01%.
- Supreme Court makes linking of Aadhar with Pan Card compulsory to file income tax returns.
- Having announced guaranteed pension of Rs 3,000 per month for 100 million unorganised workers, the finance ministry has asked the labour ministry to see if it could fund the proposed hike in minimum pension under the Employee Pension Scheme (EPS) for its subscribers from its own kitty rather than seeking funds from the Centre.
- To assess the plight of farmers, the government will conduct a pan-India survey to ascertain their income and indebtedness among other issues for the current crop year (July-June).
- The government plans to launch an index to rank states on the basis of ease of doing agri-business. Minister of State for Agriculture Parshottam Rupala replied in affirmative when asked if the government was planning to launch such an index.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 07/02/2019

Tata Motors Limited	Financial Results
Grasim Industries Limited	Financial Results
Adani Enterprises Limited	Financial Results
Aurobindo Pharma Limited	Financial Results/Dividend
Hinduja Global Solutions Limited	Financial Results/Dividend
Arvind Limited	Financial Results
Britannia Industries Limited	Financial Results
Cadila Healthcare Limited	Financial Results
Balmer Lawrie & Company Limited	Financial Results
Bajaj Electricals Limited	Financial Results
MRF Limited	Financial Results/Dividend
Gillette India Limited	Financial Results/Dividend
Ircon International Limited	Financial Results/Dividend
Majesco Limited	Financial Results
P&GH and HC Ltd	Financial Results

Adani Green Energy Limited	Financial Results
Apex Frozen Foods Limited	Financial Results
Balmer Lawrie & Company Limited	Financial Results
Borosil Glass Works Limited	Financial Results
Coffee Day Enterprises Limited	Financial Results
Endurance Technologies Limited	Financial Results
Globus Spirits Limited	Financial Results
Hinduja Ventures Limited	Financial Results
Minda Corporation Limited	Financial Results/Dividend
Nava Bharat Ventures Limited	Financial Results

### CORPORATE ACTIONS AS ON 07/02/2019

DCM Shriram Limited	Interim Dividend - Rs 4.20 Per Share Buy Back
HEG Limited	Interim Dividend - Rs 1.50 Per Share
Info Edge (India) Limited	Interim Dividend - Rs 9.50 Per Share Buy Back
Mahanagar Gas Limited	
Shanthi Gears Limited	

## INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	11062.45	10934.35	1.17%
S&P BSE SENSEX	36975.23	36616.81	0.98%
NIFTY MID100 FREE	16720.80	16710.00	0.06%
NIFTY SML100 FREE	5987.60	5959.65	0.47%

## EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	32344.63	28850.00
NSE F&O	650160.10	558363.03

## PREVIOUS FII POSITIONS ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	420.65	687.79
NET SELL	-	-

## SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	30704.45	30559.02	0.48%
BSE IT	15692.72	15438.78	1.64%
BSE CG	17194.02	17089.31	0.61%
BSE OIL & GAS	13872.16	13654.86	1.59%
BSE FMCG	11689.36	11608.33	0.70%
BSE AUTO	19262.54	19049.41	1.12%
BSE HC	13863.09	13772.36	0.66%
BSE POWER	1824.56	1828.66	-0.22%
BSE METAL	10633.06	10380.27	2.44%

## TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
TECHM	811.35	751.00	8.04%
ZEEL	388.00	365.35	6.20%
CIPLA	534.95	508.00	5.31%
TATASTEEL	485.10	464.70	4.39%
GRASIM	733.50	703.95	4.20%

## ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	20874.06	20845.45	0.14%
HangSeng	CLOSED	CLOSED	-
Straits Times	CLOSED	CLOSED	-
Shanghai	CLOSED	CLOSED	-
Kospi	CLOSED	CLOSED	-
Jakarta	6547.88	6481.45	1.02%
Taiwan	CLOSED	CLOSED	-
KLSE Composite	CLOSED	CLOSED	-
All Ordinaries	6091.80	6069.10	0.37%

## TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	330.35	339.80	-2.78%
DRREDDY	2789.70	2821.45	-1.13%
INDUSINDBK	1526.05	1541.75	-1.02%
TITAN	1059.05	1066.70	-0.72%
NTPC	137.10	138.05	-0.69%

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