

## MARKET WRAP UP

- Key equity indices ended near the flat line after a volatile session of trade. The barometer index, S&P BSE Sensex, fell 4.14 points or 0.01% to settle at 36,971.09. The Nifty 50 index rose 6.95 points or 0.06% to settle at 11,069.40. The Sensex ended slightly below the psychological 37,000 mark after opening above that level.
- Among secondary barometers, the BSE Mid-Cap index rose 0.74%. The BSE Small-Cap index rose 0.81%.

## DERIVATIVES WATCH

- Nifty February series futures witnessed a fresh long position build up. Open Interest has been increased by 20100 contracts at the end of the day.
- Long position build up for the February series has been witnessed SUNPHARMA, MARUTI, AXISBANK, TATASTEEL
- Short position build up for the February series has been witnessed in RELIANCE, HDFC, IBULHSGFIN
- Unwinding of position for the September series has been witnessed TCS, RELINFRA, DHFL

## CORPORATE NEWS

- Tata Motors** reported a massive Rs 26,961 crore consolidated loss for the December quarter. The company said it took one-time exceptional non-cash charge for asset impairment of 3.1 billion pounds. The auto firm had posted a profit of Rs 1,214.60 crore in the year-ago period. Consolidated revenue for the quarter under review rose 5 per cent YoY to Rs 77,001 crore.
- Grasim Industries** Q3 profit soars 76% YoY to Rs 958 crore. Consolidated revenue for the quarter rose 22% to Rs 18,419 crore.
- Adani Enterprises** Q3 profit slumps 72% to Rs 80 crore. Total income of the company rose to Rs 10,548.14 crore in the latest quarter from Rs 9,465.55 crore in Oct-Dec 2017.
- Cadila Healthcare** reported 22% jump in Q3FY19 net profit at Rs 510.7 crore. Revenue for the quarter was up at Rs 3,578 crore against Rs 2,961.2 crore, QoQ.
- Bajaj Electricals Ltd** reported Q3FY19 net Profit at Rs. 63.92 crore in December 2018 up 73.55% from Rs. 36.83 crore in December 2017. Net Sales at Rs 2,161.83 crore in December 2018 up 88.78% from Rs. 1,145.13 crore in December 2017.
- Sun Pharma's** subsidiary Taro reported net sales of USD 176.4 million and is higher by 13 percent. The net profit rose 422 percent to USD 93.5 million.
- Cipla** gets final approval for generic version of Adcirca.
- Lupin** gets US FDA issues observations to Pithampur unit. The company also received USFDA nod for generic version of Tadalafil tablets.
- MRF** Q3 profit skids 18% to Rs 279 crore.
- Punjab Lloyd** net loss widened to Rs 2,795.06 crore from Rs 183.9 crore in the year-ago period.
- Cummins India** reported 8.7% jump in its Q3 net profit at Rs 187.1 crore against Rs 172.2 crore in the same quarter last fiscal.
- Indraprashta Gas's** Q3FY19 net profit rose 5.7% at Rs 198 crore against Rs 187.3 crore in quarter ended September 2018.
- Eicher Motors** : Royal Enfield has hiked the prices of their bikes by upto Rs 1,500 of 350-500cc.

## INDEX CHART



## GLOBAL NEWS

- U.S. trade deficit narrowed to \$49.3 billion in November from a revised \$55.7 billion in October. Imports plunged by 2.9% to \$259.2 billion in November. Exports also fell by 0.6% to \$209.9 billion in November after edging down by 0.1% to \$211.2 billion in October.
- Italy's IHS Markit Construction PMI fell to 51.8 in January from 52.8 in December.
- Australia's construction sector continued to contract in January, albeit at a slower pace, with a Performance of Construction Index score of 43.1. That's up from 42.6 in December.
- New Zealand's jobless rate was a seasonally adjusted 4.3% in the fourth quarter of 2018, up from 3.9% in the three months prior.
- Thailand's central bank left its key interest rate unchanged in January, the Monetary Policy Committee voted 4 -2 to maintain the policy rate at 1.75%, the Bank of Thailand said.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 53.60/ bbl (IST 17:00).
- INR strengthened to Rs. 71.45 from Rs. 71.55 against each US\$ resulting in daily change of 0.14%.
- Reserve Bank of India slashed Repo rate by 25 bps to 6.25% in a dovish monetary policy review while sounding sanguine on low inflation expectations. RBI Governor Shaktikanta Das, also decided to change the monetary policy stance from 'calibrated tightening' to 'neutral', indicating that there could be further softening of the rates in the future.
- UPI transactions hit a record 672.75 million in January.
- Gems, jewellery exports decline 8.5% in April-December 2018.
- The export of oilmeals during January 2019, has gone up by 5.5 per cent to 283,850 tons compared to 269,668 tons in January 2018.
- The Cabinet Committee on Economic Affairs (CCEA) approved a corpus of ₹2,000 crore for Agri Market Infrastructure Fund (AMIF) to be created with Nabard for development and upgrade of agricultural marketing infrastructure in rural and regulated wholesale markets.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 08/02/2019

Tata Steel Limited	Financial Results
Mahindra & Mahindra Limited	Financial Results
Bharat Petroleum Corporation Ltd	Financial Results/Dividend
Dilip Buildcon Limited	Financial Results
REC Limited	Financial Results
Engineers India Limited	Financial Results/Dividend
Mishra Dhatu Nigam Limited	Financial Results
National Aluminium Company Limited	Financial Results
New Delhi Television Limited	Financial Results
NHPC Limited	Financial Results/Dividend
JK Lakshmi Cement Limited	Financial Results
Madras Fertilizers Limited	Financial Results
Gujarat Gas Limited	Financial Results
Cochin Shipyard Limited	Financial Results
Gujarat State Petronet Limited	Financial Results

Balkrishna Industries Limited	Financial Results/Dividend
Shankara Building Products Limited	Financial Results
VIP Industries Limited	Financial Results/Dividend
Visaka Industries Limited	Financial Results
Sharda Motor Industries Limited	Financial Results
Alkem Laboratories Limited	Financial Results/Dividend
Allcargo Logistics Limited	Financial Results/Dividend
Avanti Feeds Limited	Financial Results
Camlin Fine Sciences Limited	Financial Results
AIA Engineering Limited	Financial Results

### CORPORATE ACTIONS AS ON 08/02/2019

Bharat Electronics Limited	Interim Dividend - Re 0.30 Per Share
Cholamandalam Invst & Finance Co Ltd	Interim Dividend - Rs 4.50 Per Share
Dhampur Sugar Mills Limited	Interim Dividend - Rs 3.50 Per Share
Hexaware Technologies Limited	Interim Dividend - Rs 2.50 Per Share

## INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	11069.40	11062.45	0.06%
S&P BSE SENSEX	36971.09	36975.23	-0.01%
NIFTY MID100 FREE	16845.00	16720.80	0.74%
NIFTY SML100 FREE	6030.10	5987.60	0.71%

## EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	30954.86	32344.63
NSE F&O	17,97,505.44	650160.10

## PREVIOUS FII POSITIONS ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	694.97	4028.92
NET SELL	-	-

## SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	30718.18	30704.45	0.04%
BSE IT	15710.64	15692.72	0.11%
BSE CG	17180.45	17194.02	-0.08%
BSE OIL & GAS	13887.70	13872.16	0.11%
BSE FMCG	11758.11	11689.36	0.59%
BSE AUTO	19603.69	19262.54	1.77%
BSE HC	14067.54	13863.09	1.47%
BSE POWER	1816.08	1824.56	-0.46%
BSE METAL	10629.64	10633.06	-0.03%

## TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
Zee Entertain	408.75	388.00	5.35%
Sun Pharma	434.90	416.60	4.39%
Eicher Motors	21904.20	21104.25	3.79%
Bharti Infratel	305.85	296.35	3.21%
Bajaj Auto	2853.6	2770.15	3.01%

## ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	20751.28	20874.06	-0.59%
HangSeng	CLOSED	CLOSED	-
Straits Times	3200.64	CLOSED	-
Shanghai	CLOSED	CLOSED	-
Kospi	2203.42	CLOSED	-
Jakarta	6536.46	6547.88	-0.17%
Taiwan	CLOSED	CLOSED	-
KLSE Composite	1693.39	CLOSED	-
All Ordinaries	6159.10	6091.80	1.10%

## TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
JSW Steel	273.10	279.30	-2.22%
Reliance	1290.40	1310.25	-1.51%
Larsen	1296.05	1314.40	-1.40%
Power Grid Corp	184.6	186.8	-1.18%
Hindalco	209.2	211.4	-1.04%

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