

MARKET WRAP UP

- A divergent trend was witnessed as the barometer index, the S&P BSE Sensex, settled with small losses while the Nifty 50 index registered tiny gains. The S&P BSE Sensex, fell 26.09 points or 0.07% at 37,665.80. The Nifty 50 index rose 2.35 points or 0.02% at 11,389.45. Intraday volatility was high.
- The S&P BSE Mid-Cap index fell 0.18%. The S&P BSE Small-Cap index fell 0.22%.

DERIVATIVES WATCH

- Nifty August series futures witnessed a fresh long position build up. Open Interest has been increased by 8155 contracts at the end of the day.
- Long position build up for the August series has been witnessed in HDFCBANK, HDFC, INFY.
- Short position build up for the August series has been witnessed in RELIANCE, ONGC, BHARTIARTL, SBIN, ICICIBANK.
- Unwinding of position for the August series has been witnessed MARUTI, HCLTECH, MINDTREE.

CORPORATE NEWS

- Mahindra & Mahindra** reported a 67% growth in net profit at Rs 1,257 crore for the quarter ended June. M&M's net profit in the same quarter last year stood at Rs 752 crore. The company's revenues came in at Rs 13,358 crore, a growth of about 23% over the same period last year when it was Rs 10,877 crore.
- Punjab National Bank** reported a lower-than-expected net loss of Rs 940 crore for the quarter-ended June. This is the scam-hit lender's second consecutive loss as for the quarter-ended March 2018, it had posted a massive loss of Rs 13,417 crore. PNB had posted a net profit of Rs 343.40 crore for the same quarter last year. NII rose 22% year-on-year to Rs 4,692 crore. Sequentially, the NII grew by 53% from Rs 3,063.3 crore.
- TVS Motor Company** posted 13.2% rise in net profit for the quarter ended June 2018. Standalone net profit of the company grew to Rs 146.6 crore for the reporting quarter as compared to Rs 129.5 crore posted in the same quarter a year ago. Standalone revenues came in at Rs 4,153.7 crore, a growth of 22.2% as against Rs 3,399.5 crore posted in the same quarter last year.
- Motherson Sumi Systems** has reported a consolidated total income from operations of Rs 14,775.46 crore and a net profit of Rs 443.07 crore for the quarter ended Jun-2018. For the quarter ended Jun 2017 the consolidated total income from operations was Rs 13,128.63 crore and net profit was Rs 277.99 crore.
- Adani Transmission Q1** has doubled its profit in the quarter ended June 2018. The company's consolidated Q1FY19 net profit rose 101.3% at Rs 169.3 crore against Rs 84.1 crore in the same quarter last fiscal. Revenue increased 2% at Rs 621 crore versus Rs 609 crore.
- Larsen & Toubro** said its construction arm has won orders worth Rs 1,904 crore across business segments in the domestic and international markets.
- The **State Bank of India** has invited bids from asset reconstruction companies to offload loan of Rs 2,200 crore given to Bombay Rayon Fashions after the apparel maker defaulted on repayments.
- Tata Motors** is looking to trim the number of component suppliers for its passenger vehicles (PVs) to around 400 as part of its turnaround strategy.
- Vedanta Ltd** is likely to bag as many as 40 oil and gas exploration blocks in India's maiden open acreage auction.
- Glenmark's** partner Elite Pharmaceuticals, Inc., a US specialty pharmaceutical company, has received approval from the USFDA for the abbreviated new drug application (ANDA) for methadone hydrochloride 5 mg and 10 mg tablets.

INDEX CHART



GLOBAL NEWS

- China's foreign-exchange reserves rose \$5.82 billion in July from the previous month to \$3.118 trillion, after inching up \$1.51 billion in June.
- U.K. car registrations increased 1.2% year-on-year in July. About 163,898 new cars were registered in the month as the market stabilized following a turbulent first six months.
- Germany's exports registered nil growth in June from May after rising 1.7%. Meanwhile, monthly growth in imports accelerated to 1.2% from 0.7% in May. As a result, the trade surplus fell to a seasonally adjusted EUR 19.3 billion from EUR 20.4 billion in May.
- Germany's industrial production decreased by more-than-expected 0.9% month-on-month in June, reversing a revised 2.4% rise in May. Year-on-year, industrial output advanced 2.5% after rising 3% in the previous month.
- Germany's factory orders declined 4% month-on-month in June, reversing a 2.6% increase in May. On a yearly basis, factory orders fell unexpectedly by 0.8%, in contrast to May's 4.7% increase.

ECONOMIC NEWS

- Crude Oil traded at US\$ 69.71/ bbl (IST 17:00).
- INR strengthened to Rs. 68.68 from Rs. 68.88 against each US\$ resulting in daily change of 0.29%.
- The government doubled import duty on as many as 328 textile products to 20% to provide a boost to manufacturing of these items in the country.
- Over 1.11 crore farmers spread over 16 states and union territories have registered on e-NAM platform, which promotes better marketing opportunities for farmers to sell their produce online.
- The telecom regulator announced the integration of its mobile apps --- DND 2.0 and MyCall - with e-governance platform, UMANG to help consumers access multiple government services easily.
- The government will hold talks with the Reserve Bank of India (RBI) on relaxing capital norms for banks and bringing them in line with less stringent Basel III guidelines.
- Petrol prices have crossed the Rs 77 a litre mark for the first time in two months due to firming international rates. Petrol price in Delhi was today hiked by 9 paise a litre to Rs 77.06 while diesel rates went up by 6 paise to Rs 68.50 per litre.

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 08/08/2018

• Cipla Limited	Financial Results
• Lupin Limited	Financial Results
• NMDC Limited	Financial Results/Dividend
• BEML Limited	Financial Results
• PNB Housing Finance Limited	Financial Results
• Quick Heal Technologies Limited	Financial Results
• Siemens Limited	Financial Results
• Aditya Birla Capital Limited	Financial Results
• Bharat Petroleum Corporation Limited	Financial Results
• Blue Star Limited	Financial Results
• Bombay Burmah Trading Corporation Limited	Financial Results
• City Union Bank Limited	Financial Results
• Natco Pharma Limited	Financial Results/Dividend
• National Aluminium Company Limited	Financial Results
• Nesco Limited	Financial Results

• New Delhi Television Limited	Financial Results
• Emami Infrastructure Limited	Financial Results
• Future Consumer Limited	Financial Results
• Greenply Industries Limited	Financial Results
• Hindustan Construction Company Limited	Financial Results
• Hindustan Motors Limited	Financial Results
• Hindustan Petroleum Corporation Limited	Financial Results
• Indian Terrain Fashions Limited	Financial Results
• INEOS Styrolution India Limited	Financial Results
• Trent Limited	Financial Results
• UFO Moviez India Limited	Financial Results

CORPORATE ACTIONS AS ON 08/08/2018

• Motherson Sumi Systems Limited	Dividend- Rs 2.25 Per Share
• Poddar Housing and Development Limited	Dividend- Rs 1.50
• GRP Limited	Dividend - Rs 1.25 Per Share
• JK Paper Limited	Dividend- Rs 2.50 Per Share Per Share

INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	11389.45	11387.10	0.02%
S&P BSE SENSEX	37665.80	37691.89	-0.07%
NIFTY MID100 FREE	19145.55	19199.20	-0.28%
NIFTY SML100 FREE	7532.45	7597.35	-0.85%

EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	32458.52	32611.57
NSE F&O	562374.58	538996.34

PREVIOUS FII POSITIONS (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	248.70	-
NET SELL	-	1889.70

SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	31342.68	31224.79	0.38%
BSE IT	14583.56	14529.09	0.37%
BSE CG	18288.25	18299.78	-0.06%
BSE OIL & GAS	15058.19	15192.69	-0.89%
BSE FMCG	12091.81	12091.78	0.00%
BSE AUTO	24258.29	24110.48	0.61%
BSE HC	14551.16	14593.27	-0.29%
BSE POWER	1993.75	1991.03	0.14%
BSE METAL	13065.40	12847.11	1.70%

TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
TATASTEEL	573.15	553.25	3.60%
TITAN	927.25	901.65	2.84%
GRASIM	1018.85	999.40	1.95%
ASIANPAINT	1424.25	1397.40	1.92%
BAJFINANCE	2747.35	2696.25	1.90%

ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	22662.74	22507.32	0.69%
HangSeng	28248.88	27819.56	1.54%
Straits Times	3340.00	3285.34	1.66%
Shanghai	2779.37	2705.16	2.74%
Kospi	2300.16	2286.50	0.60%
Jakarta	6091.25	6101.13	-0.16%
Taiwan	10983.44	11024.10	-0.37%
KLSE Composite	1791.09	1779.75	0.64%
All Ordinaries	6340.80	6359.00	-0.29%

TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	372.30	397.35	-6.30%
COALINDIA	275.40	283.15	-2.74%
HINDPETRO	288.60	294.10	-1.87%
BPCL	394.10	401.00	-1.72%
SBIN	304.05	308.50	-1.44%

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EQUITIES

DERIVATIVES

COMMODITIES

DP SERVICES

MUTUAL FUNDS

RESEARCH