

## MARKET WRAP UP

- Key equity indices rose to fresh highs, with the benchmark BSE Sensex crossing the 38,000 level for the first time. The S&P BSE Sensex, rose 136.81 points or 0.36% to 38,024.37. The Nifty 50 index rose 20.70 points or 0.18% to 11,470.70. The Sensex ended above the psychologically important 38,000 mark.
- The BSE Mid-Cap index rose 0.59%. The BSE Small-Cap index rose 0.29%.

## DERIVATIVES WATCH

- Nifty August series futures witnessed a fresh long position build up. Open Interest has been increased by 8940 contracts at the end of the day.
- Long position build up for the August series has been witnessed in RELIANCE, SBIN, ICICIBANK.
- Short position build up for the August series has been witnessed in BHARTIARTL, HDFCBANK, HDFC.
- Unwinding of position for the August series has been witnessed BAJAJ-AUTO, CIP-LA.

## CORPORATE NEWS

- Siemens** posted 25.5% jump in standalone Profit After Tax (PAT) at Rs 204.4 crore for the quarter ended June 30, on the back of higher revenues. The company's PAT in the year-ago quarter stood at Rs 162.9 crore. Revenue in the third quarter (April-June) stood at Rs 2,964.4 crore which amounts to 14.6% increase.
- Eicher Motors** has reported 25.4% jump in its June quarter (Q1FY19) net profit at Rs 576.2 crore. The company had reported net profit of Rs 459.6 crore in a year ago period. Revenue of the company rose 27.4% at Rs 2,547.8 crore against Rs 2,000.6 crore.
- Bharat Petroleum Corp Ltd** reported a three-fold rise in its first quarter net profit on higher refining margins. Net profit in April-June at Rs 2,293.26 crore, or Rs 11.66 a share, was higher than Rs 744.56 crore, or Rs 3.79 a share, in the same period of the previous fiscal.
- Hindustan Construction Company** reported a standalone net loss of Rs 19.7 crore for the June quarter. The company had reported a net profit of Rs 14.5 crore in the year-ago period. Total income increased marginally to Rs 1,001.18 crore, compared with Rs 991.12 crore last year.
- Natco Pharma** reported a 93.27% rise in its consolidated net profit to Rs 181.1 crore for the quarter ended June 30. The company had posted a net profit of Rs 93.7 crore for the corresponding period of the previous fiscal. Consolidated total revenue of the company stood at Rs 574.5 crore for the quarter under consideration. It was Rs 448.7 crore in the corresponding period of the previous fiscal.
- Adani Enterprises Ltd** said its consolidated profit after tax (PAT) rose by 6% to Rs 169 crore in the April-June quarter of 2018-19. The company had clocked a PAT of Rs 159 crore in the year ago period. Consolidated income from operations fell to Rs 7,954 crore in the quarter under review from Rs 8,548 crore in the same quarter of the preceding fiscal.
- Bharat Forge** has started off the financial year 2018-19 on a strong note as first quarter profit surged 33.9% on growth across the board. Profit increased to Rs 234.5 crore from Rs 175.1 crore in same period last year, the company said. Revenue during the quarter rose 23.2% year-on-year to Rs 1,479.7 crore.
- Bajaj Electricals** posted a 98% year-on-year increase in its net profit for the June quarter to Rs 40.5 crore. In the first quarter of FY19, the company saw its income from operations grow 10.7% on year to Rs 1,139.93 crore.
- Larsen & Toubro's** power business has bagged an order worth Rs 1,080 crore from NTPC.

## INDEX CHART



## GLOBAL NEWS

- China consumer prices were up 2.1% on year in July, was up from 1.9% in June. On a monthly basis, CPI added 0.3% after easing 0.1% in June. The producer prices jumped an annual 4.6% - down from 4.7% in the previous month.
- U.K. RICS house price balance rose to +4% in July.
- Spain's industrial production rose by adjusted 0.5% annually after expanding 1.3% in May. Month-on-month, industrial output dropped 0.6% in June, reversing May's 0.8% rise.
- Thailand's central bank maintained its interest rate unchanged, the Monetary Policy Committee of Bank of Thailand voted 6-1 to hold the policy rate at 1.50%.
- Philippine gross domestic product advanced 6.0% year-over-year in the second quarter, slower than the 6.6% rise in the first quarter, which was revised down from a 6.8% spike reported earlier.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 68.84/ bbl (IST 17:00).
- INR weakened to Rs. 68.68 from Rs. 68.62 against each US\$ resulting in daily change of 0.08%.
- India's pharmaceutical exports grew merely 3 per cent to USD 17.3 billion in 2017-18 due to increasing regulatory concerns and pricing pressures in the global markets, including the US. The sector's exports in 2016-17 had declined to USD 16.7 billion as against USD 16.9 billion in the previous fiscal.
- The volume share of Indian pharma companies in the US generic market has grown to nearly 40% in August despite regulatory woes and pricing pressures. A steady increase in drug approvals and portfolio rationalisation by MNCs resulted in India's volume share rising by 5% over the last few months, though value is still impacted due to price erosion.
- A panel of Indian ministers will meet to consider objections by several departments against an Asian trade pact spearheaded by Beijing citing fears of a flood of Chinese imports.
- The government will shortly unveil a new industrial policy that aims to speed up regulatory reforms and lower power tariffs to make businesses more competitive and create more jobs.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 10/08/2018

State Bank of India	Financial Results
Hindalco Industries Limited	Financial Results
GAIL (India) Limited	Financial Results
Bosch Limited	Financial Results
Voltas Limited	Financial Results
Union Bank of India	Financial Results
Indraprastha Gas Limited	Financial Results
The Indian Hotels Company Limited	Financial Results
Dr. Lal Path Labs Ltd.	Financial Results
Jet Airways (India) Limited	Financial Results
Apollo Hospitals Enterprise Limited	Financial Results
Shalimar Paints Limited	Financial Results
Alkem Laboratories Limited	Financial Results
Allcargo Logistics Limited	Financial Results
JBF Industries Limited	Financial Results

Andhra Bank	Financial Results
Glenmark Pharmaceuticals Limited	Financial Results
DLF Limited	Financial Results
Galaxy Surfactants Limited	Financial Results
Autoline Industries Limited	Financial Results
Globus Spirits Limited	Financial Results
Gujarat Mineral Development Corp Ltd	Financial Results
Indiabulls Integrated Services Limited	Financial Results
Linc Pen & Plastics Limited	Financial Results
Lux Industries Limited	Financial Results
NHPC Limited	Financial Results
Sun TV Network Limited	Financial Results/Dividend

### CORPORATE ACTIONS AS ON 10/08/2018

Kalyani Steels Limited	Dividend- Rs 5 Per Share
Nestle India Limited	Interim Dividend Rs 20 Per Share

## INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	11470.70	11450.00	0.18%
S&P BSE SENSEX	38024.37	37887.56	0.36%
NIFTY MID100 FREE	19236.70	19142.80	0.49%
NIFTY SML100 FREE	7623.85	7555.30	0.91%

## EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	34903.22	31854.28
NSE F&O	1670334.12	993827.11

## PREVIOUS FII POSITIONS ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	568.63	-
NET SELL	-	47.94

## SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	32003.47	31587.70	1.32%
BSE IT	14610.88	14566.61	0.30%
BSE CG	18306.28	18358.05	-0.28%
BSE OIL & GAS	15133.80	15166.39	-0.21%
BSE FMCG	12176.01	12132.29	0.36%
BSE AUTO	24172.74	24191.81	-0.08%
BSE HC	14403.41	14502.82	-0.69%
BSE POWER	2008.35	1988.08	1.02%
BSE METAL	13284.06	13104.16	1.37%

## TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
ICICIBANK	333.00	318.70	4.49%
AXISBANK	621.05	596.30	4.15%
HINDALCO	227.45	220.60	3.11%
SBIN	317.40	308.70	2.82%
VEDL	230.60	224.80	2.58%

## ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	22598.39	22644.31	-0.20%
HangSeng	28607.30	28359.14	0.88%
Straits Times	CLOSED	3326.74	-
Shanghai	2794.38	2744.07	1.83%
Kospi	2303.71	2301.45	0.10%
Jakarta	6065.26	6094.83	-0.49%
Taiwan	11028.07	11075.25	-0.43%
KLSE Composite	1804.95	1804.73	0.01%
All Ordinaries	6383.60	6354.90	0.45%

## TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
BHARTIARTL	367.05	385.30	-4.74%
CIPLA	619.15	632.55	-2.12%
TITAN	915.30	935.00	-2.11%
ONGC	168.90	172.50	-2.09%
UPL	637.75	647.85	-1.56%

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