

DAILY ROUND-UP

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For Private Circulation Only

DATE: 11 September 2017

MARKET WRAP UP

- Trading for the week started on a firm note as key benchmark indices posted modest gains as higher global stocks boosted sentiment. The S&P BSE Sensex, rose 194.64 points or 0.61% to settle at 31,882.16. The Nifty 50 index rose 71.25 points or 0.72% to settle at 10,006.05. Nifty settled above the psychologically important 10,000 mark.
- The BSE Mid-Cap index rose 0.71%. The BSE Small-Cap index rose 0.77%. On BSE, 1,411 shares rose and 1,217 shares fell. A total of 201 shares were unchanged.

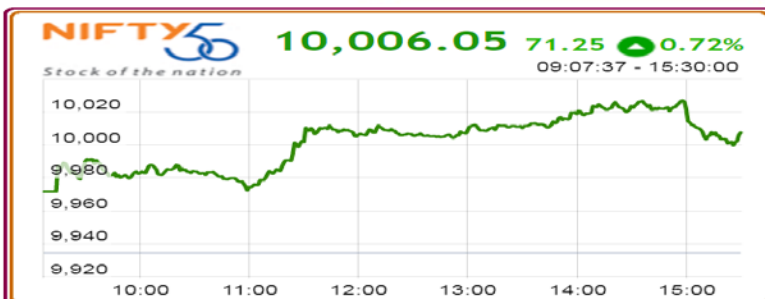
DERIVATIVES WATCH

- Nifty September series futures witnessed a fresh long position build up. Open Interest has been increased by 7906 contracts at the end of the day.
- Long position build up for the September series has been witnessed in HDFCBANK, HDFC, MARUTI.
- Short position build up for the September series has been witnessed in SBIN, ICICIBANK, INFY, HEROMOTOCO.
- Unwinding of position for the September series has been witnessed in RELIANCE, CIPLA.

CORPORATE NEWS

- IndusInd Bank Ltd** has entered into exclusive talks to acquire microlender Bharat Financial Inclusion Ltd, in a deal that will help the private sector bank to expand its consumer business.
- Bharti Airtel** in talks with multiple handset makers to bring a 4G smartphone for a price as low as Rs 2,500-2,700.
- Infosys** has completed the acquisition of London-based product design and customer experience company Brilliant Basics.
- PNB** customers will have to shell out money beginning October if they carry out more than five transactions a month from the bank's ATMs.
- Lupin** has announced that it has received final approval for its Doxycycline Hyclate Tablet USP, 100mg from the USFDA to market a generic version of Pfizer Inc's Vibra-Tabs, 100 mg.
- Glenmark Pharmaceuticals** has received final approval from the US health regulator for generic version of Rythmol SR capsules, an anti-arrhythmic medication, which treats illnesses associated with rapid heart beats.
- Sanofi India** has added one more product in the company's consumer healthcare portfolio in the pain care segment - Combiflam ICYHOT.
- Onward Technologies** has entered into a partnership with Dassault Systèmes India Business Transformation channel to accelerate the adoption of Dassault Systèmes portfolio of applications and industry solution experiences based on the 3DEXPERIENCE platform in the Indian sub-continent market.
- Panacea Biotec** has expanded its existing collaboration with Apotex Inc., the largest Canadian-owned pharmaceutical company, for sales & distribution of Prasugrel 5mg and 10mg tablets, which are generic version of Eli Lilly's Effient, in the USA.
- Shapoorji Pallonji** has pipped L&T to win the government's Rs 2,600-crore project to redevelop the ITPO complex in the national capital into an exhibition-cum-convention centre.
- JSW Steel** has reported its crude steel production for August 2017, which stood at 13.37 lakh tonnes as against 13.52 lakh tonnes in August 2016, slipping 1% on YoY basis.
- Cyient** through its step-down subsidiary Cyient Defence Services Inc. signed a definitive agreement to acquire 100% equity ownership in B&F Design Inc.

INDEX CHART



GLOBAL NEWS

- China's consumer inflation rose 1.8% year-on-year in August, up from July's 1.4%. On a monthly basis, the index was up 0.4% last month. Producer price index rose 6.3% year-on-year in August. The pace of PPI growth accelerated from 5.5% in July. On a month-on-month basis, the index was up 0.9% last month. PPI grew 6.4% year-on-year for January-August.
- U.S. consumer credit jumped by \$18.5 billion in July after rising by a downwardly revised \$11.8 billion in June.
- U.K. industrial production grew 0.2% month-on-month in July, slower than the 0.5% increase seen in June. The manufacturing output, which advanced 0.5%. Year-on-year, industrial production growth improved marginally to 0.4% in July from 0.3% in June. Manufacturing output increased 1.9% annually after expanding 0.6% a month ago.
- German exports grew 0.2% month-on-month in July, reversing a 2.7% fall in June. At the same time, imports advanced 2.2%, in contrast to a 4.4% decline in June. As a result, the trade surplus decreased to around adjusted EUR 19.6 billion from EUR 21.2 billion a month ago.

ECONOMIC NEWS

- Crude Oil traded at US\$ 47.79/bbl (IST 17:00).
- INR weakened to Rs. 63.93 from Rs. 63.78 against each US\$ resulting in daily change of 0.24%.
- Domestic passenger vehicle sales grew 13.76% to 2,94,335 units in August from 2,58,737 units in the same month last year. According to SIAM, car sales were up 11.8% to 1,98,811 units as against 1,77,829 units in August last year. Motorcycle sales last month jumped by 12.93% to 11,35,699 units as against 10,05,654 units in August 2016. Total two-wheeler sales in August grew 14.69% to 18,91,062 units compared to 16,48,871 units in the year-ago month. Sales of commercial vehicles rose by 23.22% to 65,310 units in August, the SIAM said. Vehicle sales across categories registered a growth of 14.49 per cent to 23,02,158 units from 20,01,802 units in August 2016, it added.
- All telecom equipment used by operators will have to undergo mandatory testing and get certified by authorised agencies as per specified norms from October 1, 2018, according to a DoT notification.

EQUITIES DERIVATIVES COMMODITIES* DP SERVICES MUTUAL FUNDS RESEARCH

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 12/09/2017

Emami Infrastructure Limited	Results
Zandu Realty Limited	Results
Future Lifestyle Fashions Limited	Results
Jet Airways (India) Limited	Results
GPT Infraprojects Limited	Results
Orient Refractories Limited	Results/Others
Patel Integrated Logistics Limited	Results
Shemaroo Entertainment Limited	Results
Simbhaoli Sugars Limited	Results
Soma Textiles & Industries Limited	Results/Others
SPML Infra Limited	Results

- The Mandhana Retail Ventures Limited
- V2 Retail Limited

CORPORATE ACTIONS AS ON 12/09/2017

- Container Corporation of India Limited
- Dalmia Bharat Limited
- Deepak Fertilizers and Petro Corp Ltd
- Dynemic Products Limited
- IG Petrochemicals Limited
- Maharashtra Seamless Limited
- N R Agarwal Industries Limited
- The Andhra Sugars Limited

Results

Results/Others

Dividend - Rs 7.50 Per Share
Dividend - Rs 2.20 Per Share
Dividend- Rs 6 Per Share
Dividend - Rs 1.50 Per Share
Dividend - Rs 3/- Per Share
Dividend - Rs 5 Per Share
Dividend - Rs 2/- Per Share
Dividend - Rs 10/- Per Share

Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10006.05	9934.80	0.72%
S&P BSE SENSEX	31882.16	31687.52	0.61%
NIFTY MID100 FREE	18734.85	18573.95	0.87%
NIFTY SML100 FREE	7919.05	7876.75	0.54%

Exchange Turnover

Market	Current	Previous
NSE Cash	25803.57	26292.88
NSE F&O	482710.44	330071.02

Previous FII Positions (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	-	496.53
NET SELL	256.42	-

Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	27803.84	27490.59	1.14%
BSE IT	9903.33	9917.17	-0.14%
BSE CG	18113.51	17653.98	2.60%
BSE OIL & GAS	15247.46	15096.97	1.00%
BSE FMCG	10133.02	10075.61	0.57%
BSE AUTO	24207.73	24083.09	0.52%
BSE HC	13130.29	13134.02	-0.03%
BSE POWER	2281.33	2239.41	1.87%
BSE METAL	14048.55	13956.79	0.66%

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INDUSINDBK	1791.25	1695.90	5.62%
TATAPOWER	80.60	77.00	4.68%
LT	1217.85	1172.40	3.88%
GAIL	394.80	380.10	3.87%
YESBANK	1842.05	1789.00	2.97%

Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	19545.77	19274.82	1.41%
HangSeng	27955.13	27668.47	1.04%
Straits Times	3228.51	3228.56	0.00%
Shanghai	3376.42	3365.24	0.33%
Kospi	2359.08	2343.72	0.66%
Jakarta	5871.88	5857.12	0.25%
Taiwan	10572.16	10609.95	-0.36%
KLSE Composite	1782.74	1779.90	0.16%
All Ordinaries	5775.10	5739.40	0.62%

Top Losers

SCRIP NAME	Close	Previous	Change (%)
M&M	1280.20	1295.40	-1.17%
IBULHSGFIN	1297.90	1311.20	-1.01%
SUNPHARMA	467.45	471.35	-0.83%
TCS	2454.45	2470.60	-0.65%
INFY	878.70	884.30	-0.63%

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