

## MARKET WRAP UP

- Amid a divergent trend among various index constituents, the key benchmark indices settled with small gains amid volatility. The S&P BSE Sensex, rose 46.64 points or 0.13% at 35,739.16. The Nifty 50 index rose 13.85 points or 0.13% at 10,856.70.
- The S&P BSE Mid-Cap index fell 0.46%. The S&P BSE Small-Cap index fell 0.21%.

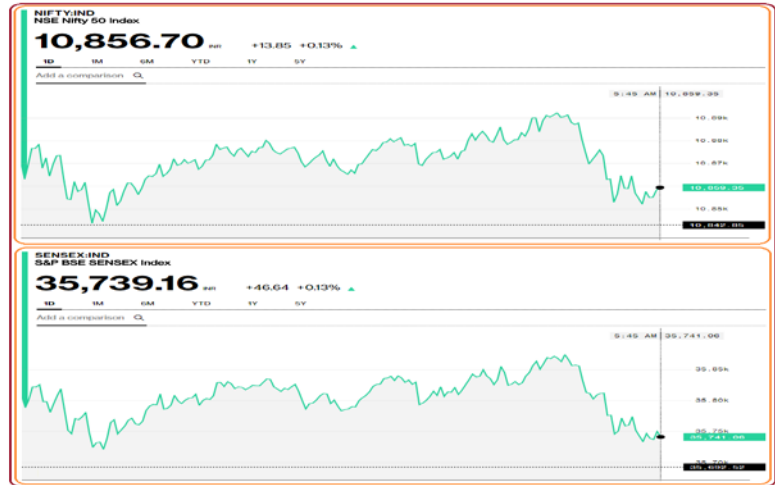
## DERIVATIVES WATCH

- Nifty June series futures witnessed a fresh long position build up. Open Interest has been increased by 10946 contracts at the end of the day.
- Long position build up for the June series has been witnessed in SBIN, ICICIBANK, COLPAL.
- Short position build up for the June series has been witnessed in HDFCBANK, MINDTREE.
- Unwinding of position for the June series has been witnessed in RELIANCE, HDFC, INFY.

## CORPORATE NEWS

- Tata Consultancy Services** board will meet Friday to consider a proposal to buy back shares.
- Tata Motors** launched an anniversary edition of its compact sedan Tigor priced at Rs 558,000 and Rs 657,000.
- Sun Pharmaceutical** Industries announced the resolution of regulatory compliance issues at Halol plant.
- Page Industries** announced extension of license agreement with Jockey International till December 31, 2040.
- Karur Vysya Bank Ltd** has entered into Bancassurance agreement with Max Bupa Health Insurance for distributing retail and group health insurance products to suit the needs of KVB customers.
- USFDA has approved Sildenafil Citrate generics of **Torrent**, **Aurobindo** and Hetero Labs. Sildenafil Citrate is sold under Viagra brand by Pfizer. The approval is for both the strengths i.e. 25mg and 50mg and Teva is already selling this drug.
- Yes Bank** is all set to buy stake in India International Clearing Corporation (IFSC) Ltd. (India ICC) and India International Exchange (IFSC) Ltd. (India INX).
- Adani's** group company offered about Rs 6,000 crore to emerge as the highest bidder for acquisition of bankruptcy-hit edible oil firm Ruchi Soya.
- The Finance Ministry will launch the second tranche of Bharat-22 exchange traded fund (ETF) on June 19 which will help raise up to Rs 8,400 crore from the markets. The investors would get a 2.5 per cent discount over the issue price.
- Kotak Mahindra Bank** has no plans to sell its 15% stake in MCX.
- Hero Motocorp** has increased its lead over Honda Motorcycles and Scooters India (HMSI) to over 2.15 lakh units in the first two months of the current fiscal.
- Bharti Airtel** said that merger talks between its Kenyan unit and Telkom Kenya fell through. The duo planned to take on the market's leading operator Safaricom.
- Punjab National Bank** said the Hong Kong Monetary Authority (HKMA) has enhanced supervision of its Hong Kong branch and has asked it "not to proactively solicit customer deposits".
- Reliance Industries** to acquire majority shareholding from existing investors of Individual Learning Pvt Ltd (Embibe) to deliver personalized learning outcomes to each student, RIL, Embibe and the other stakeholders have completed all the closing conditions and have successfully completed the sale and purchase of the shareholding of the existing investors in Embibe to RIL.

## INDEX CHART



## GLOBAL NEWS

- U.S. consumer price index rose by 0.2% in May, matching the increase seen in April. Core consumer prices increased by 0.2% in May after inching up by 0.1% in April. The annual rate of consumer price growth accelerated to 2.8% in May from 2.5% in April. Core consumer price growth also edged up to a fifteen-year high of 2.2% in May from 2.1% in the previous month.
- U.S. federal budget deficit was \$146.80 billion in May, 66% wider than the same month a year earlier.
- U.K. consumer price inflation held steady at 2.4% in May, the lowest since March 2017. Month-on-month, consumer prices gained 0.4% in May. Core inflation also remained stable in May, at 2.1%.
- U.K. house price index climbed 3.9% year-over-year in April, slower than March's 4.2% rise.
- Eurozone employment rose 0.4% sequentially in the March quarter, just above the 0.3% increase in the previous month. On an annual basis, employment growth eased to 1.4% in the first quarter from 1.6% in the December quarter.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 66.01/ bbl (IST 17:00).
- INR weakened to Rs. 67.64 from Rs. 66.48 against each US\$ resulting in daily change of 0.24%.
- India's retail inflation rose to a four month high in May - CPI stood at 4.87% in May against 4.58% in April.
- India's industrial production picked up pace in April, growth as measured by the IIP was 4.9% in April compared with 4.5% in March. Mining expanded 5.1% in April compared with 3% a year earlier, while manufacturing, which constitutes 77.63% of IIP, grew 5.2% versus 2.9% a year ago.
- The first quarter of calendar year 2018 was the best on record for solar installations in India with 3,269 MW installed -- a 34% increase compared to 2,448 Mw installed in the fourth quarter of 2017. The cumulative installed solar capacity totalled 22.8 Gw at the end of January-March 2018.
- India and the US have agreed to hold official-level comprehensive talks to address trade and economic issues, days after President Donald Trump accused New Delhi of charging 100% tariff on some of the US' goods.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 14/06/2018

- KSK Energy Ventures Limited Financial Results
- MIC Electronics Limited Financial Results
- Nitin Fire Protection Ind Ltd Financial Results
- Vakrangee Limited Financial Results

### CORPORATE ACTIONS AS ON 14/06/2018

- Asian Paints Limited Dividend- Rs 6.05 Per Share
- Infosys Limited Final Dividend Rs 20.50 Per Shar/ Special Dividend - Rs 10 Per Share
- Jagran Prakashan Limited Buyback
- LG Balakrishnan & Bros Limited Bonus 1:1
- Nila Infrastructures Limited Scheme Of Arrangement

## INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	10856.70	10842.85	0.13%
S&P BSE SENSEX	35739.16	35692.52	0.13%
NIFTY MID100 FREE	18919.45	18985.50	-0.35%
NIFTY SML100 FREE	7710.20	7726.70	-0.21%

## EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	29082.30	27770.94
NSE F&O	693000.92	613694.61

## PREVIOUS FII POSITIONS ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	-
NET SELL	1168.88	1017.01

## SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	29894.54	29813.46	0.27%
BSE IT	13839.43	13663.07	1.29%
BSE CG	18632.57	18756.76	-0.66%
BSE OIL & GAS	14655.52	14656.76	-0.01%
BSE FMCG	11279.66	11327.68	-0.42%
BSE AUTO	24995.09	24999.61	-0.02%
BSE HC	13835.09	13755.55	0.58%
BSE POWER	2051.98	2057.38	-0.26%
BSE METAL	13676.33	13728.74	-0.38%

## TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	2256.30	2190.65	3.00%
CIPLA	582.10	567.10	2.65%
TCS	1824.10	1781.00	2.42%
LUPIN	871.90	855.00	1.98%
HINDALCO	245.00	240.65	1.81%

## ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	22966.38	22878.35	0.38%
HangSeng	30725.15	31103.06	-1.22%
Straits Times	3392.51	3430.69	-1.11%
Shanghai	3049.80	3079.80	-0.97%
Kospi	CLOSED	2468.83	-
Jakarta	CLOSED	CLOSED	-
Taiwan	11173.21	11144.79	0.26%
KLSE Composite	1763.27	1764.16	-0.05%
All Ordinaries	6133.10	6164.80	-0.51%

## TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
TATASTEEL	567.60	580.00	-2.14%
ADANI PORTS	382.85	388.90	-1.56%
ZEEL	557.10	565.20	-1.43%
BAJFINANCE	2231.05	2261.25	-1.34%
BHARTIARTL	375.65	380.65	-1.31%

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