

# DAILY ROUND-UP

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## MARKET WRAP UP

- Domestic stocks nudged lower on first trading session of the week tracking weakness in European and Asian markets. The S&P BSE Sensex lost 281 points or 0.84% to settle at 33,033.56. The Nifty 50 index lost 96.80 points or 0.94% to settle at 10,224.95. The Sensex settled above the 33,000 level after falling below that level in late trade.
- The S&P BSE Mid-Cap index fell 0.19%. The S&P BSE Small-Cap index declined 0.41%.

## DERIVATIVES WATCH

- Nifty November series futures witnessed a fresh short position build up. Open Interest has been increased by 17843 contracts at the end of the day.
- Long position build up for the November series has been witnessed in HDFCBANK, TCS.
- Short position build up for the November series has been witnessed in RELIANCE, LT, BHARTIARTL, SBIN, HDFC, INFY.
- Unwinding of position for the November series has been witnessed in ICICIBANK, AXISBANK.

## CORPORATE NEWS

- NTPC Ltd** posted profit after tax from continuing operations for the second quarter ended September 30 fell 2.3% to Rs 2,439 crore (\$372.71 million) from Rs 2,497 crore a year earlier. Revenue from its generation segment rose about two% to Rs 19,916 crore.
- Britannia Industries** has reported a 11.5% growth year-on-year in consolidated profit for July-September quarter. The profit for the quarter stood at Rs 261 crore, against Rs 234 crore in same quarter last fiscal. Consolidated revenue during the quarter increased 6.6% to Rs 2,545.3 crore, compared with Rs 2,387 crore in year-ago.
- Adani Ports and Special Economic Zone Limited** reported a 7.88% decline in consolidated net profit to Rs 992.37 crore for the second quarter ended September 30. The company had clocked a net profit of Rs 1,077.28 crore in the corresponding period of the last fiscal. Its total income rose to Rs 2,962.12 crore during the quarter under review as against Rs 2,410.03 crore in the corresponding period a year ago.
- Idea Cellular** posted a loss of Rs 1,106.80 crore for the second quarter of the current financial year vs net profit of Rs 91.5 crore in the July-September quarter of the last financial year. Its revenue from operations fell 19.72% to Rs 7,465.5 crore in the July-September quarter of the current financial year, from Rs 9,300.3 crore in the year-ago period.
- PC Jewellers** posted a 40.83% jump in standalone net profit at Rs 150.59 crore for the quarter ended September on strong sales. Net profit was Rs 106.93 crore in the same period of the previous year. Total income increased by 18.78% to Rs 2,642.98 crore in July-September of 2017-18, from Rs 2,225 crore in the year-ago period.
- Abbott India** reported 83.31% jump in net profit to Rs 137.52 crore for the September quarter on account of robust sales. It had posted a net profit of Rs 75.02 crore for the corresponding period of last fiscal. The total income of the company also rose to Rs 946.04 crore for the July-September quarter of 2017-18 as against Rs 743.78 crore in the same quarter of 2016-17.
- SpiceJet Ltd** reported a 79% rise in quarterly profit, standalone net profit came in at 1.05 billion rupees (\$16.04 million) for the quarter ended Sept. 30, compared with 589.1 million rupees last year. Net income from operations rose about 30% to 17.97 billion rupees.

## INDEX CHART



## GLOBAL NEWS

- China's new yuan loans fell to CNY 663.2 billion in October, from September's CNY 1.27 trillion. M2 money supply climbed 8.8% year-on-year in October.
- U.K. visible trade deficit fell to GBP 11.25 billion in September from GBP 12.35 billion in August.
- U.K. industrial production climbed 0.7% month-on-month in September, faster than the 0.3% increase seen in August. Manufacturing output also advanced 0.7% over the month. Year-on-year, industrial production growth improved to 2.5% in September from 1.8% in August. Manufacturing output expanded 2.7% annually in September.
- Germany's wholesale price inflation climbed 3% year-on-year in October, slower than the 3.4% increase seen in September. On a monthly basis, wholesale prices remained flat in October after rising 0.6% a month ago.
- France industrial production grew by more-than-expected 0.6% month-on-month in September, reversing a 0.2% fall in August.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 56.90/bbl (IST 17:00).
- INR weakened to Rs. 65.42 from Rs. 65.16 against each US\$ resulting in daily change of 0.40%.
- India's industrial production rose 3.8% year-on-year in September. The August production growth was revised up to 4.5% from 4.3% reported initially. Manufacturing and electricity sectors registered 3.4% increase each.
- Prices of shampoo, chocolates, nutrition drinks and condensed milk are set to drop 5-15% after the GST Council eased these from higher tax slabs.
- India's onion export rose by 56% to 12.29 lakh tonnes in April-July this year, but the country has now gone in for import of the kitchen staple as retail prices have shot up to Rs 65-70 per kg because of tight supplies. In value terms too, the onion export increased by 47.69% to Rs 1,443.09 crore in the period under review, from Rs 977.84 crore a year ago.
- India and Canada will make efforts for expeditious conclusion of a Comprehensive Economic Partnership Agreement on goods and services at the annual ministerial dialogue starting here tomorrow.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 14/11/2017

• Sun Pharmaceutical Industries Limited	Results
• GAIL (India) Limited	Results
• Eicher Motors Limited	Results
• Bank of Baroda	Results
• Bata India Limited	Results
• CEAT Limited	Results
• Tata Global Beverages Limited	Results
• Godrej Industries Limited	Results
• Grasim Industries Limited	Results
• Corporation Bank	Results/Others
• Cox & Kings Limited	Results
• Dilip Buildcon Limited	Results/Others
• Cadila Healthcare Limited	Results
• Indiabulls Real Estate Limited	Results

• Reliance Capital Limited	Results
• NBCC (India) Limited	Results
• Indo Count Industries Limited	Results
• Fortis Healthcare Limited	Results
• Dixon Technologies (India) Limited	Results
• Hinduja Ventures Limited	Results
• Eros International Media Limited	Results
• Bombay Rayon Fashions Ltd	Results
• ICSA (India) Limited	Results
• IFCI Limited	Results
• BASF India Limited	Results

### CORPORATE ACTIONS AS ON 14/11/2017

• L&T Technology Services Ltd	Interim Dividend - Rs 4/- Per Share
• Shriram City Union Finance Ltd	Interim Dividend - Rs 6/- Per Share

Results
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Results

Interim Dividend - Rs 4/- Per Share
Interim Dividend - Rs 6/- Per Share

## Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10224.95	10321.75	-0.94%
S&P BSE SENSEX	33033.56	33314.56	-0.84%
NIFTY MID100 FREE	19483.45	19575.95	-0.47%
NIFTY SML100 FREE	8501.45	8559.40	-0.68%

## Exchange Turnover

Market	Current	Previous
NSE Cash	30447.87	36053.13
NSE F&O	400710.62	539062.15

## Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	-
NET SELL	529.22	2423.65

## Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	28780.16	28920.88	-0.49%
BSE IT	10752.43	10732.63	0.18%
BSE CG	18445.88	18736.10	-1.55%
BSE OIL & GAS	15808.83	15978.51	-1.06%
BSE FMCG	10268.36	10353.35	-0.82%
BSE AUTO	24814.79	24931.75	-0.47%
BSE HC	13769.12	13858.88	-0.65%
BSE POWER	2274.74	2291.08	-0.71%
BSE METAL	14364.34	14633.62	-1.84%

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TCS	2758.95	2708.75	1.85%
M&M	1411.20	1392.95	1.31%
SUNPHARMA	532.55	527.85	0.89%
HPCL	420.10	416.85	0.78%
UPL	739.65	735.10	0.62%

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	22380.99	22681.42	-1.32%
HangSeng	29182.18	29120.92	0.21%
Straits Times	3419.13	3420.10	-0.03%
Shanghai	3447.84	3432.67	0.44%
Kospi	2530.35	2542.95	-0.50%
Jakarta	6021.46	6021.83	-0.01%
Taiwan	10683.92	10732.67	-0.45%
KLSE Composite	1737.49	1742.28	-0.27%
All Ordinaries	6089.60	6104.30	-0.24%

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
ADANI PORTS	413.35	432.05	-4.33%
AUROPHARMA	710.20	740.10	-4.04%
ONGC	184.20	191.10	-3.61%
COALINDIA	274.95	284.35	-3.31%
VEDL	314.70	323.85	-2.83%

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