

## MARKET WRAP UP

- Key benchmark indices logged modest gains on last trading day of the week on the back of exit poll outcome. The S&P BSE Sensex, gained 216.27 points or 0.65% to settle at 33,462.97. The Nifty 50 index rose 81.15 points or 0.79% at 10,333.25.
- The S&P BSE Mid-Cap index rose 1%. The S&P BSE Small-Cap index advanced 1.38%.

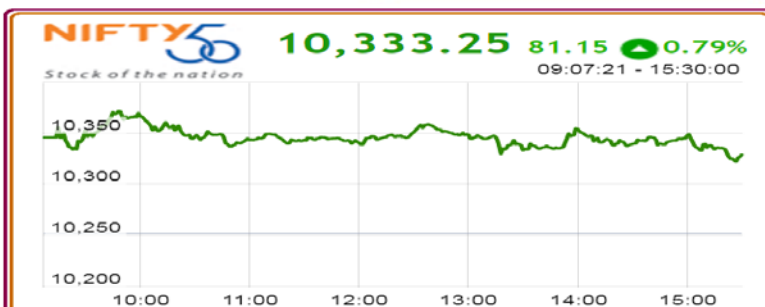
## DERIVATIVES WATCH

- Nifty December series futures witnessed an unwinding of short position. Open Interest has been increased by 6445 contracts at the end of the day.
- Long position build up for the December series has been witnessed in RELIANCE, INFY.
- Short position build up for the December series has been witnessed in BHEL, BHARTIARTL, ICICIBANK.
- Unwinding of position for the November series has been witnessed in HDFCBANK, IDEA.

## CORPORATE NEWS

- Bhel** has won a Rs 7,300 crore order for setting up a Supercritical Thermal Power Project (TPP) in Tamil Nadu. The order for setting up the 2x660 MW Udangudi TPP has been placed on the state-owned firm by Tamil Nadu Generation and Distribution Corporation Ltd (TANGEDCO).
- Larsen & Toubro** has successfully commissioned and handed over the state-of-the-art 225 MW Sikalaha Combined Cycle Power Plant to Bangladesh Power Development Board (BPDB) for commercial operation.
- Tata Motors** delivered the first set of Tigor Electric Vehicles (EVs) to state-run Energy Efficiency Services Limited (EESL) as part of their initiative to procure 10,000 electric vehicles.
- Mahindra & Mahindra** is set to take price hikes up to 3% on its passenger and commercial vehicles from January 1, 2018.
- Cadila Healthcare** has received approval from the US health regulator to market Pramipexole Dihydrochloride extended-release tablets, used for treating Parkinson's disease, in the American market.
- Yes Bank** will be included in the S&P BSE Sensex comprising of 30 companies with effect from December 18, 2017.
- AstraZeneca Pharma India** said that subject to the receipt of Import License from the Drugs Controller General of India, the FDC of Dapagliflozin + Metformin Hydrochloride film coated tablets (XIGDUO XR) is expected to be launched in India in Q4 of FY 2017-18.
- Torrent Pharmaceuticals** has completed acquisition of branded formulation business of Unichem Laboratories for India and Nepal, including its Sikkim manufacturing facility, on a going concern basis by way of slump sale, on December 14, 2017.
- Deepak Fertilizers and Petrochemicals Corporation** has rejected GAIL's claim of Rs 357 crore against the company.
- Eveready Industries** has received orders for supply of ceiling fans and smart LED Street lighting Luminaries worth Rs23.85cr.
- GMR Group** in consortium with Megawide Construction Corporation has emerged as the preferred bidder for Clark International Airport EPC tender having submitted the most competitive financial bid.
- M&M subsidiary Mahindra Overseas Investment Company (Mauritius) Ltd**, a wholly owned subsidiary of the Company (MOICML) has on December 13, 2017 executed a sale of 64,50,000 shares representing 5% of the Share Capital of CIE Automotive S.A., a company incorporated in Spain and quoted on the Madrid and Bilbao Stock Exchanges at an average gross price of Euro 23.50 per share, aggregating Rs~114cr.

## INDEX CHART



## GLOBAL NEWS

- China's central bank unexpectedly lifted its rates on open market operation after the Federal Reserve tightened its policy rates. The People's Bank of China raised its 7-day and 28-day reverse repo rates by 5 basis points to 2.50% and 2.80%, respectively. A similar action was last taken in mid-March.
- U.S. initial jobless claims dropped to 225,000 in the week ended December 9th, a decrease of 11,000 from the previous week's unrevised level of 236,000. Continuing claims fell by 27,000 to 1.886 million in the week ended December 2nd.
- U.S. retail sales climbed by 0.8% in November after rising by an upwardly revised 0.5% in October. Core retail sales surged up by 1.0% in November after climbing by 0.4% in October. Compared to the same month a year ago, retail sales were up by 5.8% in November, a notable acceleration from the 4.9% year-over-year increase in October.
- The IEA in a monthly oil report said global oil supplies rose by 170,000 barrels a day in November to 97.8 million barrels a day. The IEA said OPEC production declined for a fourth straight month, but also warned that "2018 might not be quite so happy for OPEC producers" as supply growth could exceed demand growth by 200,000 barrels a day in the first half.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 57.35/bbl (IST 17:00).
- INR strengthened to Rs. 64.04 from Rs. 64.34 against each US\$ resulting in daily change of 0.47%.
- The Supreme Court has extended mandatory linking of Aadhaar for all services, including new bank accounts and mobile services to March 31, 2018.
- The Finance Ministry has raised customs duty on some electronic items including television, mobile phone, projector and water heater in order to boost domestic manufacturing. As per a government notification, customs duty on television set has been increased to 15% from the existing 10%.
- The Union cabinet cleared a bill that renders instant triple talaq or talaq-e-biddat a cognisable offence and non-bailable in nature. The bill will be tabled in the winter session of Parliament.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 18/12/2017

- Future Market Networks Limited Preferential issue
- JM Financial Limited Raising of Funds

### CORPORATE ACTIONS AS ON 18/12/2017

- Colgate Palmolive (India) Limited Int Div - Rs 4/- Per Share

## Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10333.25	10252.10	0.79%
S&P BSE SENSEX	33462.97	33246.70	0.65%
NIFTY MID100 FREE	19962.30	19760.60	1.02%
NIFTY SML100 FREE	8552.15	8459.65	1.09%

## Exchange Turnover

Market	Current	Previous
NSE Cash	32230.08	25347.58
NSE F&O	454995.01	1247587.62

## Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	232.17	-
NET SELL	-	1808.34

## Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	28740.08	28460.51	0.98%
BSE IT	10897.57	10856.60	0.38%
BSE CG	18328.04	18118.92	1.15%
BSE OIL & GAS	16289.91	16231.29	0.36%
BSE FMCG	10552.79	10517.43	0.34%
BSE AUTO	25549.24	25214.03	1.33%
BSE HC	14035.78	13977.64	0.42%
BSE POWER	2267.23	2258.02	0.41%
BSE METAL	13868.38	13488.47	2.82%

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
VEDL	298.00	284.55	4.73%
YESBANK	315.90	303.90	3.95%
M&M	1483.40	1431.60	3.62%
COALINDIA	271.00	262.85	3.10%
HINDALCO	242.75	236.40	2.69%

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	22553.22	22694.45	-0.62%
HangSeng	29166.38	29222.10	-0.19%
Straits Times	3416.94	3435.78	-0.55%
Shanghai	3266.14	3292.44	-0.80%
Kospi	2482.07	2469.48	0.51%
Jakarta	6119.42	6113.65	0.09%
Taiwan	10491.44	10538.01	-0.44%
KLSE Composite	1753.07	1759.00	-0.34%
All Ordinaries	6086.20	6096.40	-0.17%

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TECHM	500.75	514.25	-2.63%
CIPLA	576.45	590.45	-2.37%
BOSCHLTD	19730.30	19880.20	-0.75%
ONGC	183.00	184.35	-0.73%
POWERGRID	198.85	200.10	-0.62%

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