

MARKET WRAP UP

- Key benchmark indices jumped backed by strong gains in metals and FMCG shares as firmness in European stocks boosted sentiment in the latter part of the session. The S&P BSE Sensex, rose 321.86 points or 1.02% to settle at 31,770.89. The Nifty 50 index jumped 103.15 points or 1.05% to settle at 9,897.30. Key indices gained for the second day in a row today, 16 August 2017.
- The BSE Mid-Cap index rose 1.26%. The BSE Small-Cap index gained 1.31%. On BSE, 1646 shares rose and 943 shares fell. A total of 115 shares were unchanged.

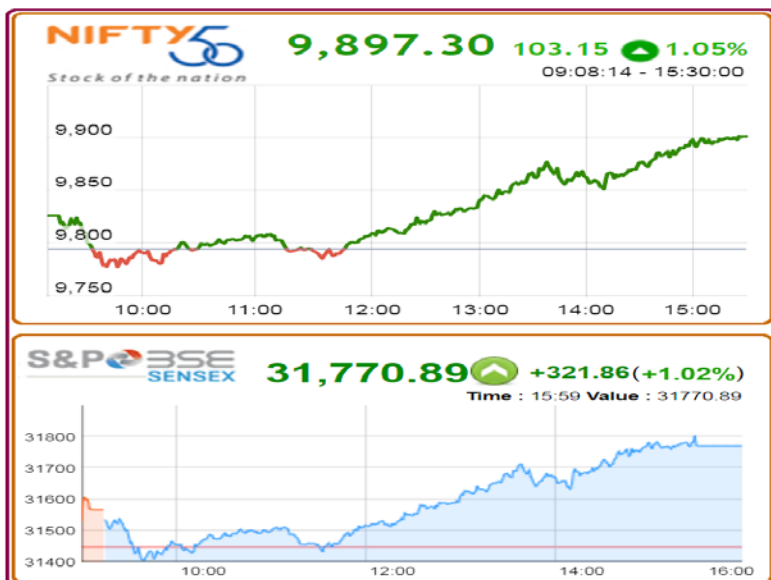
DERIVATIVES WATCH

- Nifty August series futures witnessed a fresh long position build up. Open Interest has been increased by 18250 contracts at the end of the day.
- Long position build up for the August series has been witnessed in SBIN, ICICIBANK, HDFCBANK, HDFC.
- Short position build up for the August series has been witnessed in RELIANCE, LT, INFY.
- Unwinding of position for the August series has been witnessed in ADANIPOWER, IFCI, HDIL, IGL.

CORPORATE NEWS

- Coal India's** Q1 consolidated revenue came in at Rs. 20568 crore, registering 8.1% yoy increase. The PAT for the quarter came in at Rs. 2351 crore, yoy decline of 23.3%.
- NBCC** Q1 revenue down 0.1% at Rs1556 crore (YoY). EBITDA up 35% to Rs71.6 crore. Margin expanded to 4.6% from 3.4%. Profit up 37% to Rs61.3 crore.
- Suven Life Sciences** Q1 revenue up 6% to Rs141 crore (YoY). EBITDA up 4.4% to Rs45 crore. Margin contracted to 32.1% from 32.6%. Net profit down 9.2% to Rs30 crore.
- Patel Engineering** Q1 revenue down 6.9% to Rs556.4 crore (YoY). EBITDA up 1.5% to Rs87.7 crore. Margin expanded to 15.8% from 14.5%. Net loss of Rs5 crore from net loss of Rs23.3 crore.
- Shreyas Shipping & Logistics** Q1 revenue up 39% to Rs118 crore (YoY). EBITDA up 146% to Rs27.3 crore. Margin expanded to 23.1% from 13.1%. Profit up 288% to Rs19 crore.
- Granules India** Q1 revenue up 10.3% to Rs386 crore (YoY). EBITDA up 12.5% to Rs77 crore. Margin expanded to 20.2% from 19.8%. Net profit down 5.4% to Rs37 crore.
- Prestige Estates** Q1 revenue up 35.4% to Rs1,280 crore (YoY). EBITDA up 55% to Rs265 crore. Margin expanded to 20.7% from 18.1%. Profit up 67.6% to Rs119 crore.
- Sun Pharmaceutical Industries** has received the order passed by National Company Law Tribunal (NCLT) at Ahmedabad bench in the matter of Scheme of Arrangement among Sun Pharma Medisales, Ranbaxy Drugs, Gufic Pharma, Vidyut Investments and the company and their respective members and creditors, the company said.
- Aurobindo Pharma** is in race with Intas Pharma to acquire assets of Teva Pharma - Israeli generic drug maker.
- Biocon Ltd** has withdrawn its application seeking European Union approval for two drugs after the EU drugs regulator sought re-inspection of their production facility.
- Granules India** said that the US drug regulator has issued Establishment Inspection Report (EIR) for the Gagillapur facility of the company located at Hyderabad, Telangana, India.
- Cadila Healthcare** said its group firm Zydus Cadila has received final approval from the US health regulator to market blood pressure drug, Tiadylt ER.

INDEX CHART



GLOBAL NEWS

- China's new yuan loans dropped to CNY 825.5 billion from CNY 1.54 trillion in June. The annual growth in M2 slowed to 9.2% in July from 9.4% in June.
- U.S. retail sales climbed by 0.6% in July after rising by a revised 0.3% in June. Core retail sales still rose by 0.5% in July following a 0.1% uptick in June.
- U.K. unemployment rate fell to 4.4% in the second quarter from 4.9% a year ago. In July, the claimant count held steady at 2.3%. The number of people claiming unemployment benefits decreased by 4,200 from June.
- Eurozone gross domestic product grew 0.6% quarter-on-quarter in the second quarter, slightly faster than the 0.5% increase seen in the first quarter. On a yearly basis, GDP growth was revised up slightly to 2.2% from 2.1%.
- Germany's gross domestic product grew 0.6% sequentially in the second quarter. Moreover, the first quarter growth was revised up to 0.7% from 0.6%. Price-adjusted GDP growth came in at 0.8% versus 3.2% a quarter ago.

ECONOMIC NEWS

- Crude Oil traded at US\$ 47.65/bbl (IST 17:00).
- INR weakened to Rs. 64.15 from Rs. 64.12 against each US\$ resulting in daily change of 0.05%.
- India's consumer price inflation rose 2.36% year-on-year in July. June's inflation rate was revised down to 1.46% from 1.54%. Compared to the previous month, the CPI rose 1.67% in July.
- India's trade deficit narrowed to \$11.45 billion in July from a month ago. The trade shortfall was \$12.96 billion in June. Imported goods worth \$33.99 billion last month, up 15.42% from a year ago. The figure was lower than imports of \$36.52 billion in June. Gold imports, however, in July nearly doubled from last year to \$2.1 billion. Merchandise exports for July came in at \$22.54 billion, up 3.94% year-on-year.
- The government has extended by five years the anti-dumping duty imposed on import of chemical compound PTFE, used as a non-stick coating for pans and other cookware, to safeguard the domestic industry. The revenue department has issued a notification imposing \$2,637 per tonne as anti-dumping duty on imports of polytetrafluoroethylene (PTFE) from China.

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DAILY ROUND-UP

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 17/08/2017

- Dish TV India Limited Results
- Eris Lifesciences Limited Results
- Goenka Diamond and Jewels Limited Results/Others
- Somany Ceramics Limited Results/Others

Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	9897.30	9794.15	1.05%
S&P BSE SENSEX	31770.89	31449.03	1.02%
NIFTY MID100 FREE	18088.70	17853.65	1.32%
NIFTY SML100 FREE	7491.65	7368.70	1.67%

Exchange Turnover

Market	Current	Previous
NSE Cash	26122.12	23896.76
NSE F&O	849969.81	368608.31

Previous FII Positions (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	-	1672.65
NET SELL	1638.83	-

Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	27572.83	27228.86	1.26%
BSE IT	10262.41	10211.25	0.50%
BSE CG	17255.47	17277.33	-0.13%
BSE OIL & GAS	14615.45	14564.17	0.35%
BSE FMCG	10029.79	9785.99	2.49%
BSE AUTO	23987.16	23605.07	1.62%
BSE HC	13214.76	13090.85	0.95%
BSE POWER	2275.16	2266.06	0.40%
BSE METAL	12931.97	12713.39	1.72%

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TECHM	419.95	402.20	4.41%
TATAMOTORS	389.25	375.40	3.69%
CIPLA	590.45	570.05	3.58%
BANKBARODA	147.15	142.25	3.44%
TATAPOWER	82.05	79.55	3.14%

Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	19729.28	19753.31	-0.12%
HangSeng	27409.07	27174.96	0.86%
Straits Times	3278.95	3294.93	-0.48%
Shanghai	3246.45	3251.26	-0.15%
Kospi	2348.26	2334.22	0.60%
Jakarta	5891.95	5835.04	0.98%
Taiwan	10290.39	10311.16	-0.20%
KLSE Composite	1773.75	1772.39	0.08%
All Ordinaries	5830.80	5804.00	0.46%

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ASIANPAINT	1141.30	1154.00	-1.10%
NTPC	170.10	171.75	-0.96%
YESBANK	1761.85	1778.50	-0.94%
POWERGRID	220.70	222.75	-0.92%
INFY	975.20	981.45	-0.64%

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