

# DAILY ROUND-UP

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## MARKET WRAP UP

- Key benchmark indices settled on a flat note in a quiet session of trade. The S&P BSE Sensex lost 24.48 points or 0.08% to settle at 32,609.16. The Nifty 50 index rose 3.60 points or 0.04% to settle at 10,234.45. Both the Sensex and the Nifty hit record highs in intraday trade.
- The S&P BSE Mid-Cap index rose 0.4%. The S&P BSE Small-Cap index advanced 0.53%.

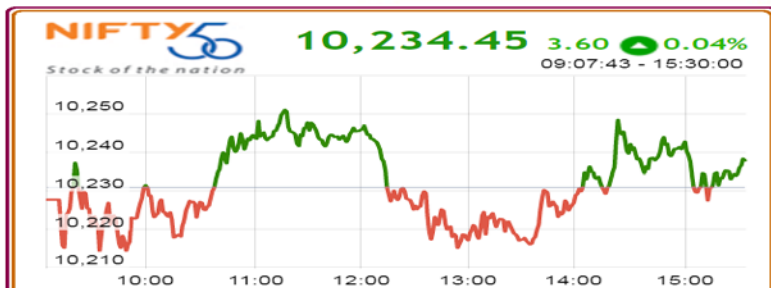
## DERIVATIVES WATCH

- Nifty October series futures witnessed a fresh long position build up. Open Interest has been increased by 2283 contracts at the end of the day.
- Long position build up for the October series has been witnessed in BHARTIARTL, TCS, ACC.
- Short position build up for the October series has been witnessed in SBIN, ICICIBANK, HDFCBANK, HDFC, INFY.
- Unwinding of position for the October series has been witnessed in RELIANCE, TATASTEEL, TECHM.

## CORPORATE NEWS

- Axis Bank** reported Q2 NII remained flat at Rs.4539 crore vs Rs.4513 crore in previous year corresponding quarter. This was largely due to muted interest income growth to Rs.11235 crore vs Rs.11159 crore in Q2FY18. Net profit for the quarter rose by 35% yoy to Rs.432 crore vs Rs.318 crore in Q2FY17.
- Bajaj Auto** consolidated revenue for the quarter came in at Rs. 6566.4 crore, registering 2.1% yoy increase. The PAT for the quarter came in at Rs. 1194 crore, yoy decline of 0.6%.
- ACC** consolidated revenue for the quarter came in at Rs. 3116.5 crore, registering 9.6% yoy increase. The PAT for the quarter came in at Rs. 181.5 crore, yoy increase of 102.3%.
- Wipro Ltd.**'s consolidated revenue for the quarter came in at Rs. 13423 crores, registering 1.5% QoQ decline. PAT for the quarter came in at Rs. 2192 crores, QoQ increase of 5.5%.
- ICICI Lombard General Insurance** reported a 19.3% increase in net profit at Rs 204.04 crore vs Rs 170.95 crore (YoY). Total income also rose to Rs 2,098.05 crore for the quarter, from Rs 1,948.31 crore in the year-ago period.
- HT Media** reported Q2 consolidated net profit at Rs 66.22 crore vs Rs 30.93 crore (YoY). Net sales during the quarter under review however decline 6.90 per cent to Rs 560.63 crore as against Rs 602.23 crore in the year-ago period.
- Atul** standalone revenue for the quarter came in at Rs. 787 crore, registering 6.6% yoy increase. The PAT for the quarter came in at Rs. 70.1 crore, yoy decline of 14.9%.
- Reliance Industries** and its partner BP Plc of the UK will invest about \$1.5 billion to bring to production six satellite gas discoveries in the flagging KG-D6 block by 2022.
- Maruti Suzuki's** all-new Dzire has achieved the fastest 1-lakh sales mark, a distinctive feat in the Indian automobile industry. The third generation Dzire, launched in May 2017, has surpassed the 1-lakh sales milestone in just five and half months.
- Glenmark Pharmaceuticals Inc., USA** (Glenmark) has been granted final approval by the United States Food & Drug Administration (US FDA) for Aprepitant Capsules USP, 40 mg, 80 mg, and 125 mg, the generic version of Emend Capsules, 40 mg, 80 mg, and 125 mg, of Merck Sharp & Dohme Corporation.
- Aurobindo Pharma** has received final approval from the USFDA to manufacture Esomeprazole Magnesium Delayed-Release Capsules OTC, 20mg. Esomeprazole Magnesium Delayed-Release Capsules OTC, a therapeutic equivalent generic version of AstraZeneca's Nexium 24HR Capsules.

## INDEX CHART



## GLOBAL NEWS

- U.K. inflation rose to 3% in September from 2.9% in August. Month-on-month, consumer prices gained 0.3% in September. Core inflation held steady at 2.7%.
- Eurozone economic confidence indicator for the currency bloc dropped 5.0 points to 26.7 points in October. In contrast, the indicator for the current economic situation climbed 1.0 point to a level of 36.5 points.
- Eurozone trade surplus rose to a seasonally adjusted EUR 21.6 billion in August from EUR 17.9 billion in July. Exports increased 2.5% from previous month, while imports gained only 0.4%. On an unadjusted basis, the trade balance showed a surplus of EUR 16.1 billion compared to a EUR 17.5 billion surplus in the previous year.
- Germany's ZEW Indicator of Economic Sentiment rose to 17.6 in October from 17.0 in the previous month. At the same time, the indicator for current situation fell unexpectedly by 0.9 points to 87.0 points in October.
- Germany's wholesale price inflation advanced 3.4% year-on-year in September, following a 3.2% rise in August. Month-on-month, wholesale price inflation doubled to 0.6% from 0.3% in August.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 52.08/bbl (IST 17:00).
- INR weakened to Rs. 65.02 from Rs. 64.74 against each US\$ resulting in daily change of 0.43%.
- India Inc's investment in overseas ventures fell by nearly 39.3% to USD 2.65 billion in September this year, according to the RBI
- The Cabinet Committee on Economic Affairs (CCEA) will soon take a call on methodology for allocation of coal blocks for commercial mining
- India is likely to stick to its fiscal deficit target of 3.2% of GDP, and may accelerate sales of government stakes in lenders and other companies as part of an effort to recapitalize banks, according to PM advisor.
- Getting investment in the infrastructure sector and bankruptcy reforms are the two issues which are on the top of the government's agenda acc to Economic Affairs Secretary.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 18/10/2017

- UltraTech Cement Limited Results
- NIIT Technologies Limited Results/Others
- SIL Investments Limited Results

### CORPORATE ACTIONS AS ON 18/10/2017

- Pokarna Limited Face Value Split - From Rs 10/- to Rs 2/- Per Share

### Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10234.45	10230.85	0.04%
S&P BSE SENSEX	32609.16	32633.64	-0.08%
NIFTY MID100 FREE	18887.90	18779.10	0.58%
NIFTY SML100 FREE	8066.70	8009.95	0.71%

### Exchange Turnover

Market	Current	Previous
NSE Cash	28042.79	29905.35
NSE F&O	640634.65	683570.78

### Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	1221.74
NET SELL	29.92	-

### Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	27681.53	27748.27	-0.24%
BSE IT	10405.24	10430.73	-0.24%
BSE CG	17522.95	17447.74	0.43%
BSE OIL & GAS	15807.38	15691.20	0.74%
BSE FMCG	10253.69	10242.38	0.11%
BSE AUTO	25051.82	25043.83	0.03%
BSE HC	14284.66	14230.88	0.38%
BSE POWER	2242.72	2238.85	0.17%
BSE METAL	14748.51	14712.37	0.25%

### Top Gainers

SCRIP NAME	Close	Previous	Change (%)
CIPLA	632.10	606.75	4.18%
BPCL	512.75	498.40	2.88%
BHARTIARTL	465.95	453.30	2.79%
IBULHSGFIN	1325.70	1295.10	2.36%
HPCL	470.80	460.45	2.25%

### Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	21336.12	21255.56	0.38%
HangSeng	28697.49	28692.80	0.02%
Straits Times	3329.03	3323.06	0.18%
Shanghai	3372.04	3378.47	-0.19%
Kospi	2484.37	2480.05	0.17%
Jakarta	5947.33	5949.70	-0.04%
Taiwan	10723.15	10774.21	-0.47%
KLSE Composite	1748.99	1754.37	-0.31%
All Ordinaries	5958.10	5917.20	0.69%

### Top Losers

SCRIP NAME	Close	Previous	Change (%)
ZEEL	494.80	514.45	-3.82%
AXISBANK	513.15	520.35	-1.38%
TATAMOTORS	432.30	437.05	-1.09%
BAJFINANCE	1867.10	1886.30	-1.02%
DRREDDY	2381.35	2403.50	-0.92%

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