

DAILY ROUND-UP

Phone : +91 33 2359 4612 +91 33 2359 4614 +91 33 2358 1953
E-mail : research@shriraminsight.com



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MARKET WRAP UP

- Indian stocks eked out small gains on last trading day of the week. The S&P BSE Sensex, rose 12.53 points or 0.03% at 36,386.61. The Nifty 50 index rose 1.75 points or 0.02% at 10,906.95. Global stocks rose Friday amid optimism for progress in US-China trade talks.
- The S&P BSE Mid-Cap index fell 0.79%. The S&P BSE Small-Cap index fell 0.73%.

DERIVATIVES WATCH

- Nifty January series futures witnessed a fresh long position build up. Open Interest has been increased by 1005 contracts at the end of the day.
- Long position build up for the January series has been witnessed RELIANCE, BHEL.
- Short position build up for the January series has been witnessed in LT, BHARTIARTL, SBIN, ICICIBANK, HDFC, INFY.
- Unwinding of position for the January series has been witnessed HDFCBANK, CIP-LA.

CORPORATE NEWS

- Reliance Industries** has reported a better-than-expected 7.7% sequential growth in third quarter consolidated net profit at Rs 10,251 crore. Consolidated revenue during the quarter grew by 9.1% sequentially to Rs 1.56 lakh crore.
- Sun Pharma** share price crashed to six years low on report of whistleblower has filed a second complaint against it. This, according to the report, was the same whistleblower who had complained to Sebi in the Ranbaxy insider trading case. The company, however, clarified in a regulatory filing on Friday that the company had not received the alleged "172-page whistle blower complaint" and it was "not privy to the contents of the document being referred in the said media article".
- Larsen & Toubro Infotech** posted net sales at Rs 2,330.50 crore in December 2018 up 31.06% from Rs. 1,778.20 crore in December 2017. Net profit at Rs. 362.70 crore in December 2018 up 35.69% from Rs. 267.30 crore in December 2017.
- NIIT Technologies** posted consolidated net sales at Rs 971.70 crore in December 2018 up 28.45% from Rs. 756.50 crore in December 2017. Net profit at Rs. 100.20 crore in December 2018 up 21.31% from Rs. 82.60 crore in December 2017.
- Cyient** posted consolidated net sales at Rs 1,187.70 crore in December 2018 up 20.79% from Rs. 983.30 crore in December 2017. Net profit at Rs. 92.30 crore in December 2018 up 5.13% from Rs. 87.80 crore in December 2017.
- Kajaria Ceramics** posted consolidated net sales at Rs 758.56 crore in December 2018 up 14.73% from Rs. 661.16 crore in December 2017. Net profit at Rs. 64.80 crore in December 2018 up 19.32% from Rs. 54.31 crore in December 2017.
- Aurobindo Pharma** has acquired seven marketed oncology injectable products from Spectrum Pharmaceuticals Inc for about \$300 million, which includes an upfront cash payment of up to \$160 million and up to \$140 million in milestones.
- Rallis India** posted net sales at Rs 417.35 crore in December 2018 up 6.97% from Rs. 390.16 crore in December 2017. Net profit at Rs. 13.88 crore in December 2018 down 44.35% from Rs. 24.94 crore in December 2017.
- GAIL** is planning to terminate Rs 270 crore pipe laying contracts it awarded IL&FS last year as the financially-troubled contractor is unable to make progress, delaying the Prime Minister's pet pipeline project that would take natural gas to much of eastern India via his constituency Varanasi.
- Dhanlaxmi Bank** posted NII came at Rs 91.22 crore in December 2018 up 8.95% from Rs. 83.73 crore in December 2017. Net profit at Rs. 16.90 crore in December 2018 up 177.74% from Rs. 21.74 crore in December 2017.
- Arvind Ltd** is in talks with Dutch company DyeCoo to introduce CO2-dyeing in its manufacturing plant in India.

INDEX CHART



GLOBAL NEWS

- U.S. initial jobless claims edged down to 213,000 in the week ended January 12th, a decrease of 3,000 from the previous week's unrevised level of 216,000. Continuing claims increased by 18,000 to 1.737 million in the week ended January 5th.
- Eurozone adjusted current account surplus narrowed to 20 billion euros (17.61 billion pounds) in November from 27 billion euros in October.
- U.K. seasonally adjusted retail sales including auto fuel decreased 0.9% from November, when they grew 1.3%. On a year-on-year basis, retail sales rose 3% in December following a 3.4% increase in the previous month. Core retail sales volume fell 1.3% monthly in December, which was the biggest drop since May 2017, when sales decreased 1.6%. In November, sales grew 1%. Compared to the same month a year ago, retail sales rose 2.6% in December following a 3.5% increase in November.
- Eurozone construction output declined a calendar and seasonally-adjusted 0.1% month-on-month in November, after a 1.6% contraction in October. On a yearly basis, production in construction grew a calendar adjusted 0.9% following a 0.6% expansion in December.

ECONOMIC NEWS

- Crude Oil traded at US\$ 52.81/ bbl (IST 17:00).
- INR weakened to Rs. 71.18 from Rs. 71.05 against each US\$ resulting in daily change of 0.19%.
- The Medicinal bandages and tapes, cotton wool, tent fabrics, nylon ropes, painting canvas, glass fibres, life jackets and certain outer garments are among the 207 products that the government will now be identified as technical textiles.
- An amount of Rs 23,606 crore has been collected from different districts under a government scheme for mining-affected people, Union Minister Narendra Singh Tomar said.
- Petrol got costlier by Rs 0.08, for diesel 19 paise more in Delhi. At NCR, at Rs. 70.55/litre for petrol and Rs. 64.97/litre for diesel. In Mumbai, petrol and diesel prices are at Rs. 76.18/litre (increase by Rs. 0.07) & Rs. 68.02/litre (increase by Rs. 0.20), respectively.
- A series of vote-catching measures planned by Prime Minister Narendra Modi as he braces for a difficult general election may cost more than Rs 1 lakh crore (\$14 billion).

EQUITIES

DERIVATIVES

COMMODITIES

DP SERVICES

MUTUAL FUNDS

RESEARCH

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*Through Insight Commodities & Futures Pvt. Ltd.

SHRIRAM INSIGHT SHARE BROKERS LTD.
CK-5, Sector-II, Saltlake City, Kolkata - 700 091
Tel : 2359 4612, 2359 4614, 2359 4877 Fax : (033) 2321-8429
E-mail : research@shriraminsight.com

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 19/01/2019

HDFC Bank Limited	Financial Results
The South Indian Bank Limited	Financial Results
Aro Granite Industries Limited	Financial Results
Hindustan Oil Exploration Co Limited	Financial Results
Siyaram Silk Mills Limited	Financial Results

BOARD MEETINGS AS ON 21/01/2019

Kotak Mahindra Bank Limited	Financial Results
HDFC Asset Management Company Limited	Financial Results
Hindustan Zinc Limited	Financial Results
L&T Finance Holdings Limited	Financial Results
Union Bank of India	Financial Results
Housing & Urban Development Corp Ltd	Financial Results

Coromandel International Limited	Financial Results
Zensar Technologies Limited	Financial Results/Dividend
GHCL Limited	Financial Results
IRB InvIT Fund	Financial Results
Just Dial Limited	Financial Results
Sasken Technologies Limited	Financial Results
Sundaram Finance Holdings Limited	Financial Results
Supreme Petrochem Limited	Financial Results
Kopran Limited	Financial Results
Monnet Ispat & Energy Limited	Financial Results

CORPORATE ACTIONS AS ON 21/01/2019

India Grid Trust	Distribution - Interest Payment Rs 3 Per Unit
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INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	10906.95	10905.20	0.02%
S&P BSE SENSEX	36386.61	36374.08	0.03%
NIFTY MID100 FREE	17517.20	17635.85	-0.67%
NIFTY SML100 FREE	6371.20	6440.25	-1.07%

EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	28532.06	27590.51
NSE F&O	513332.07	1747997.37

PREVIOUS FII POSITIONS (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	842.13	407.76
NET SELL	-	-

SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	30739.83	30812.25	-0.24%
BSE IT	14670.87	14649.86	0.14%
BSE CG	17703.37	17957.63	-1.42%
BSE OIL & GAS	13578.59	13529.82	0.36%
BSE FMCG	11872.73	11942.07	-0.58%
BSE AUTO	19917.31	19991.41	-0.37%
BSE HC	13801.60	14083.11	-2.00%
BSE POWER	1954.53	1963.42	-0.45%
BSE METAL	11080.32	11101.10	-0.19%

TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
RELIANCE	1184.35	1134.45	4.40%
WIPRO	346.15	335.40	3.21%
KOTAKBANK	1240.20	1219.95	1.66%
HINDALCO	208.80	206.00	1.36%
HCLTECH	966.30	954.70	1.22%

ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	20666.07	20402.27	1.29%
HangSeng	27090.81	26755.63	1.25%
Straits Times	3224.34	3214.44	0.31%
Shanghai	2596.01	2559.64	1.42%
Kospi	2124.28	2107.06	0.82%
Jakarta	6448.16	6423.78	0.38%
Taiwan	9836.06	9789.15	0.48%
KLSE Composite	1692.22	1682.97	0.55%
All Ordinaries	5941.20	5909.80	0.53%

TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
SUNPHARMA	390.75	426.55	-8.39%
BHARTIARTL	311.15	332.05	-6.29%
GAIL	322.15	332.40	-3.08%
LT	1317.90	1346.05	-2.09%
HINDPETRO	239.50	244.20	-1.92%

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