

## MARKET WRAP UP

- Domestic stocks registered steep losses on first trading day of the week. The S&P BSE Sensex, fell 265.83 points or 0.84% to settle at 31,258.85. The Nifty 50 index fell 83.05 points or 0.84% to settle at 9,754.35. Weakness in global stocks weighed on sentiment on the domestic bourses.
- The S&P BSE Mid-Cap index lost 1.45%. The S&P BSE Small-Cap index fell 1.02%.

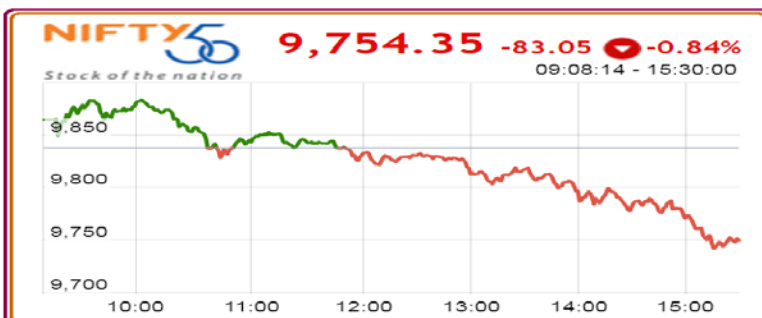
## DERIVATIVES WATCH

- Nifty August series futures witnessed a fresh short position build up. Open Interest has been increased by 14180 contracts at the end of the day.
- Long position build up for the August series has been witnessed in ICICIBANK, TCS, ITC.
- Short position build up for the August series has been witnessed in RELIANCE, SBIN, HDFCBANK, HDFC, INFY.
- Unwinding of position for the August series has been witnessed in JUSTDIAL, ACC.

## CORPORATE NEWS

- State Bank of India** has announced waiver of up to 100 percent of processing fee on car loans, personal gold loans and personal loans for the festive season. The public sector lender had previously waived off processing fee on the takeover of home loans.
- Tata Motors** launched the mid-end variant of its hatchback Tiago model priced at Rs 4.79 lakh incorporating the new automated manual transmission (AMT) technology, the introduction of which earlier in the high-end variant has been well received.
- ICICI Bank** cuts interest rate on savings deposit below Rs50 lakh to 3.5% from 4%.
- Union Bank of India** reduced savings bank interest rates by 0.5% to 3.5% on deposits up to Rs25 lakh.
- Bajaj Electricals** announced that the company has bagged an order from Transmission Corporation of Telangana worth Rs391.45 crore.
- Aurobindo Pharma** get tentative approval from USFDA for Dolutegravir, Lamivudine & Tenofovir Disoproxil Fumarate tablets, used for treatment of HIV-1 infection along as a complete regimen in adults and pediatric patients weighing 40 kg and greater.
- Jubilant Life Sciences** has announced that Jubilant Pharma, a material wholly owned subsidiary of the Company, through one of its wholly owned subsidiaries, Jubilant Draximage Inc, Montreal, Canada, has received USFDA approval for Drax Exametazime (Kit for the Preparation of Tc99m Exametazime for leukocyte labeling), for its NDA.
- Laurus Labs** has completed the USFDA inspection of its API facilities in units 1 and 3 at Parawada, Visakhapatnam, Andhra Pradesh with two observations which are only procedural in nature.
- Suven Life Sciences** announced the grant of one product patent from Japan corresponding to the New Chemical Entities (NCEs) for the treatment of disorders associated with Neurodegenerative diseases and the patent is valid through 2034.
- Indian Oil Corporation Ltd** was said to invest about Rs52,000 crore in expanding the Paradip refinery.
- Tata Power** has installed the company's first Electric Vehicles (EV) charging station at Vikhroli, Mumbai. The company aims to build a network to make it easier for people to adapt to EVs and be future ready.

## INDEX CHART



## GLOBAL NEWS

- U.S. preliminary reading on the consumer sentiment index for August jumped to 97.6 from the final July reading of 93.4.
- U.K. average asking price for a house was down 0.9% on month in August - slipping 2,758 pounds. That follows the 0.1% increase in July. On a yearly basis, house prices climbed 3.1%, up from 2/8% in the previous month.
- Eurozone current account surplus fell to EUR 21.2 billion in June from EUR 30.5 billion in May.
- German producer prices advanced 2.3% year-on-year in July, slightly weaker than the 2.4% increase seen in June. Month-on-month, producer prices gained 0.2% after staying flat in June.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 48.67/bbl (IST 17:00).
- INR strengthened to Rs. 64.13 from Rs. 64.14 against each US\$ resulting in daily change of 0.01%.
- India's consumer confidence Index score decreased by six points to 128 in the April-June quarter of 2017, from a high of 136 from the last polled survey in Q4 of 2016.
- The Finance Ministry has imposed a definitive anti-dumping duty on certain 'textured toughened (tempered) glass' imports from China.
- The government mulls to allow 100% FDI in the defence sector to stimulate the participation of foreign companies in the manufacture of military transport aircraft, battle tanks and armoured vehicles, reported a national news daily.
- The government of India has prepared a list of 16,794 shell companies which mostly comprised of real estate, finance and entertainment companies.
- A grant agreement from the Global Environment Facility (GEF) of the World Bank of USD 24.64 million for Ecosystem Service Improvement Project was signed, said a government release. The size of the project is USD 24.64 million which will be entirely financed by the World Bank out of its GEF Trust Fund. The project's duration is five years.

# DAILY ROUND-UP

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 22/08/2017

• GATI Limited	Results
• Ahluwalia Contracts (India) Limited	Results/Others
• Mukand Engineers Limited	Results
• Agro Dutch Industries Limited	Results
• Mayur Uniquoters Ltd	Results/Dividend
• Morarjee Textiles Limited	Results
• Mukand Limited	Results
• Pricol Limited	Results

• Manappuram Finance Limited	Interim Dividend - Re 0.50 Per Share
• Pfizer Limited	Dividend Rs 15/- Per Share + Special Dividend Rs 5/- Per Share
• Sharda Motor Industries Limited	Dividend - Rs 6.25 Per Share
• Triveni Engineering & Industries Limited	Interim Dividend - Re 0.25 Per Share

### CORPORATE ACTIONS AS ON 22/08/2017

• Entertainment Network (India) Limited	Dividend - Re 1/- Per Share
• Man Infraconstruction Limited	Dividend - Re 0.54 Per Share

## Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	9754.35	9837.40	-0.84%
S&P BSE SENSEX	31258.85	31524.68	-0.84%
NIFTY MID100 FREE	17781.55	18044.50	-1.46%
NIFTY SML100 FREE	7408.75	7519.65	-1.47%

## Exchange Turnover

Market	Current	Previous
NSE Cash	24708.24	28953.20
NSE F&O	504350.08	461058.12

## Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	-
NET SELL	2182.12	2604.16

## Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	27025.51	27183.84	-0.58%
BSE IT	9875.82	10081.89	-2.04%
BSE CG	17077.62	17220.27	-0.83%
BSE OIL & GAS	14562.02	14794.46	-1.57%
BSE FMCG	10045.46	10076.13	-0.30%
BSE AUTO	23544.31	23785.70	-1.01%
BSE HC	12730.11	12938.17	-1.61%
BSE POWER	2249.93	2284.97	-1.53%
BSE METAL	12755.87	12941.50	-1.43%

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
AXISBANK	494.80	490.40	0.90%
M&M	1378.65	1370.00	0.63%
TCS	2528.80	2513.80	0.60%
TECHM	431.10	428.85	0.52%
EICHERMOT	31634.25	31511.45	0.39%

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	19393.13	19470.41	-0.40%
HangSeng	27154.68	27047.57	0.40%
Straits Times	3246.99	3251.99	-0.15%
Shanghai	3286.91	3268.72	0.56%
Kospi	2355.00	2358.37	-0.14%
Jakarta	5861.00	5893.84	-0.56%
Taiwan	10326.39	10321.33	0.05%
KLSE Composite	1771.62	1776.22	-0.26%
All Ordinaries	5770.00	5798.50	-0.49%

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFY	873.40	923.25	-5.40%
BANKBARODA	142.10	147.20	-3.46%
IOC	413.20	427.35	-3.31%
ADANI PORTS	375.95	386.20	-2.65%
DRREDDY	1931.10	1982.00	-2.57%

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