

## MARKET WRAP UP

- Key benchmark indices settled with modest after a volatile trading session. Firmness in global stocks supported domestic bourses. The S&P BSE Sensex, rose 116.76 points or 0.36% at 32,506.72. The Nifty 50 index gained 38.30 points or 0.38% at 10,184.85. The Sensex snapped three-day losing streak.
- The S&P BSE Mid-Cap index rose 0.45%. The S&P BSE Small-Cap index gained 0.09%.

## DERIVATIVES WATCH

- Nifty November series futures witnessed an unwinding of short position. Open Interest has been decreased by 34867 contracts at the end of the day.
- Long position build up for the November series has been witnessed in RELIANCE, SBIN, ICICIBANK, HDFCBANK, INFY.
- Short position build up for the November series has been witnessed in HDFC, TATAMOTORS, ITC.

## CORPORATE NEWS

- Hindustan Zinc Ltd** posted a 34% rise in second-quarter profit. Net profit rose to Rs 2,545 crore in the three months ended September 30 from Rs 1,902 crore a year earlier, said the company, which is a unit of Vedanta Ltd. Revenue from operations rose 52% to Rs 5,309 crore, while income from zinc operations rose 45 per cent to Rs 3,903 crore.
- Havells India** reported Q2 net profit of Rs 171.02 crore vs Rs 145.79 crore (YoY). Net sales during the quarter under review stood at Rs 1,777.36 crore against Rs 1,559.33 crore in the year-ago period.
- Graphite India** standalone revenue for the quarter came in at Rs. 462 crore, registering 35.9% yoy increase. The PAT for the quarter came in at Rs. 90 crore, yoy increase of 464.2%.
- Zuari Agro Chemicals Ltd** reported nearly four-fold jump in its standalone net profit to Rs 53.52 crore for the second quarter ended September. Its net profit stood at Rs 13.39 crore in the year-ago period. Total revenue rose to Rs 1,346.77 crore in the second quarter of 2017-18 fiscal from Rs 1,084.17 crore in the corresponding period of the previous year.
- TINPLATE COMPANY OF INDIA LTD.** has reported net sales of Rs.444.45 crores during the period ended September 30, 2017 as compared to Rs.182.33 crores during the period ended September 30, 2016. The company has posted net profit of Rs.17.80 crores for the period ended September 30, 2017 as against Rs.10.40 crores for the period ended September 30, 2016.
- NOCIL LTD.** has reported net sales of Rs.232.75 crores during the period ended September 30, 2017 as compared to Rs.201.66 crores during the period ended September 30, 2016. The company has posted net profit of Rs.38.07 crores for the period ended September 30, 2017 as against Rs.27.29 crores for the period ended September 30, 2016.
- BHEL** has commenced execution of Rs 20,400-crore Yadadri supercritical thermal power project ordered by the Telangana State Power Generation Corporation.
- Mahindra & Mahindra** has invested Rs 16 crore to replace LED lights at 18 manufacturing sites in a tie-up with the state-run Energy Efficiency Services Limited (EESL).
- Dr. Reddy's Laboratories** said that a US Appeals court has ruled that the patent for Merck's birth control device NuvaRing is valid.
- Granules India Ltd** has received USFDA approval for Prasugrel tablet.
- Rejecting **Nalco's** claim that three units of the PSU's captive power plants were shut due to fuel shortage, the coal ministry on Monday said there is ample dispatch of coal to the PSU which has a regular supply of 4.7 MTPA dry fuel, more than the committed quantity by **Coal India**.

## INDEX CHART



## GLOBAL NEWS

- China's gross domestic product expanded 1.7% on quarter in the third quarter of 2017, down from 1.8% in the second quarter. On a yearly basis, GDP advanced 6.9% - unchanged from the previous three months. The industrial production jumped an annual 6.6% in September - up from 6.0% in August. Retail sales were up 10.3% on year, up from 10.1% in the previous month. Fixed asset investment was up an annual 7.5%, down from 7.8% a month earlier.
- U.S. initial jobless claims dropped to 222,000 in the week ended October 14th, a decrease of 22,000 from the previous week's revised level of 244,000. Continuing claims declined by 16,000 to 1.888 million in the week ended October 7th.
- U.S. existing home sales climbed by 0.7% to an annual rate of 5.39 million in September from a rate of 5.35 million in August.
- U.S. housing starts plunged by 4.7% to an annual rate of 1.127 million in September from the revised August estimate of 1.183 million. Building permits, an indicator of future housing demand, also tumbled by 4.5% to an annual rate of 1.215 million in September from a revised 1.272 million in August.
- Eurozone current account surplus rose to EUR 33.3 billion in August from EUR 31.5 billion in July. On an unadjusted basis, the current account surplus fell to EUR 29.6 billion from EUR 37.1 billion in July.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 52.12/bbl (IST 17:00).
- INR strengthened to Rs. 65.02 from Rs. 65.04 against each US\$ resulting in daily change of 0.03%.
- Global healthcare IT/digital health companies raised USD 5.5 billion in 586 deals from global VCs in the January-September period of 2017 against USD 4.2 billion from 463 deals in the same period of last year.
- The Department of Pharmaceuticals (DoP) is divided over amending the drug price control order, with key members of the government body offering conflicting views about the proposed change in method of calculating ceiling prices and the inclusion of nonessential medicines.

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# DAILY ROUND-UP

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 24/10/2017

• Infosys Limited	Results/Dividend
• HDFC Bank Limited	Results
• Ambuja Cements Limited	Results
• Asian Paints Limited	Results/Dividend
• Zee Entertainment Enterprises Ltd	Results
• ABB India Limited	Results
• Can Fin Homes Limited	Results
• Chambal Fertilizers & Chemicals Ltd	Results
• GHCL Limited	Results
• ICICI Prudential Life Insurance Co. Ltd	Results/Dividend
• Phillips Carbon Black Limited	Results
• Radico Khaitan Limited	Results
• Rallis India Limited	Results

• Raymond Limited
• Saregama India Limited
• Trident Limited
• TTK Prestige Limited
• Mahindra CIE Automotive Limited

Results/Others
Results
Results
Results
Results

## Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10184.85	10146.55	0.38%
S&P BSE SENSEX	32506.72	32389.96	0.36%
NIFTY MID100 FREE	18845.00	18789.90	0.29%
NIFTY SML100 FREE	8081.70	8068.00	0.17%

## Exchange Turnover

Market	Current	Previous
NSE Cash	29180.67	5744.77
NSE F&O	699741.97	147064.38

## Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	-
NET SELL	43.74	56.88

## Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	26887.34	26842.53	0.17%
BSE IT	10453.57	10360.42	0.90%
BSE CG	17445.12	17485.80	-0.23%
BSE OIL & GAS	16023.94	15894.56	0.81%
BSE FMCG	10182.07	10249.28	-0.66%
BSE AUTO	24830.51	24826.00	0.02%
BSE HC	14047.34	14137.39	-0.64%
BSE POWER	2272.31	2253.22	0.85%
BSE METAL	14609.84	14541.84	0.47%

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BHARTIARTL	497.35	473.75	4.98%
ULTRACEMCO	4205.05	4034.35	4.23%
RELIANCE	939.75	909.90	3.28%
AMBUJACEM	281.80	274.05	2.83%
ICICIBANK	262.55	257.85	1.82%

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	21696.65	21457.64	1.11%
HangSeng	28305.88	28487.24	-0.64%
Straits Times	3349.80	3340.73	0.27%
Shanghai	3380.70	3378.65	0.06%
Kospi	2490.05	2489.54	0.02%
Jakarta	5950.03	5929.55	0.35%
Taiwan	10735.21	10728.88	0.06%
KLSE Composite	1741.45	1740.65	0.05%
All Ordinaries	5956.70	5968.60	-0.20%

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
CIPLA	592.90	607.80	-2.45%
INFRATEL	449.00	460.25	-2.44%
AXISBANK	449.95	460.30	-2.25%
UPL	778.35	793.70	-1.93%
IBULHSGFIN	1337.75	1360.70	-1.69%

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