

MARKET WRAP UP

- Key benchmark indices logged modest gains after a volatile session of trade supported by positive global stocks. The S&P BSE Sensex, rose 106.50 points or 0.29% at 36,825.10. The Nifty 50 index rose 49.55 points or 0.45% at 11,134.30. The market rose for the third straight session.
- The S&P BSE Mid-Cap index rose 1.77%. The S&P BSE Small-Cap index rose 2.21%.

DERIVATIVES WATCH

- Nifty August series futures witnessed a fresh long position build up. Open Interest has been increased by 57260 contracts at the end of the day.
- Long position build up for the August series has been witnessed in HDFCBANK, HDFC, INFY.
- Short position build up for the August series has been witnessed in RELIANCE, ICICIBANK.

CORPORATE NEWS

- ACC Ltd's PAT** was flat on yoy basis to Rs328.7cr. The company's revenue (net of excise duty in the base quarter) grew by 11.4% yoy to Rs3,848.3cr.
- Hindustan Zinc**, a unit of Vedanta posted a 1.5% rise in first-quarter net profit. Net profit was Rs 1,918 crore (\$278.69 million) in the quarter ended June 30, compared with Rs 1,889 crore a year earlier. Total income rose about 6% to Rs 5,310 crore, while revenue from its biggest segment, zinc, climbed 11% to Rs 3,814 crore.
- Radico Khaitan** reported 84.46% jump in its standalone net profit to Rs 47.37 crore for the first quarter of the current fiscal. It had a net profit of Rs 25.68 crore in the first quarter of last fiscal, 2017-18. The company's total income from operations stood at Rs 2,118.01 crore during the April-June quarter of 2018-19. It was Rs 1,380.72 crore in the year-ago period.
- Granules India** reported a 40.73% rise in its consolidated net profit at Rs 51.79 crore for the quarter ended on June 30, 2018. The company had posted a net profit of Rs 36.80 crore for the corresponding period of the previous fiscal. Consolidated revenue from the operations of the company stood at Rs 453.23 crore for the quarter under consideration as against Rs 384.73 crore for the same period year ago.
- TV18 Broadcast's** consolidated loss for the first quarter ended June 2018 narrowed to Rs 6.8 crore from Rs 14.28 crore in the same period last fiscal. Consolidated revenue from operations for the quarter stood at Rs 1,088.2 crore against Rs 219.06 crore in corresponding period last year.
- Kajaria Ceramics'** first quarter net profit declined 7.2% year-on-year to Rs 45.4 crore. Revenue from operations in Q1 grew by 4.6% to Rs 657 crore YoY with volume growth at 9%.
- Chambal Fertilizers and Chemicals Ltd's** revenue for Q1FY19 came in at Rs2,190.37cr, up 11.4% yoy. The adjusted net profit after tax (excluding discontinued operations) stood at Rs155.38cr, up 14.9% yoy.
- Welspun Corp** reported 14.71% decline in consolidated profit after tax (PAT) at Rs 43.65 crore for the April-June quarter of this financial year. The company's PAT stood at Rs 51.18 crore in the corresponding quarter of 2017-18. Total income from operation for the quarter under review grew by 24% at Rs 2,085.51 crore from Rs 1,681.77 crore in the same period in the last financial year
- ICICI Securities** reported a 13% year-on-year rise in net profit at Rs 134 crore in the June quarter. The company had reported a consolidated net profit of Rs 118 crore in the same period last year. Its revenue rose by 9% to Rs 436 crore in the June quarter, against Rs 401 crore in the year-ago period.
- Coal India** has managed an average premium of 39% on 6.38 million tonnes of coal it auctioned to sponge iron customers, helping the state-run coal monopoly get additional annual revenue of Rs 1,248 crore for five years.

INDEX CHART



GLOBAL NEWS

- China's central bank injected record liquidity into the banking system via medium-term lending facility to alleviate funding pressure. The People's Bank of China on Monday offered CNY 502 billion of MLF with one-year maturity. This was the biggest injection via MLF since it was introduced in 2014.
- U.S. existing home sales fell by 0.6% to an annual rate of 5.36 million in June from a downwardly revised rate of 5.41 million in May.
- Eurozone consumer confidence index eased to -0.6 in July from -0.5 in June.
- France's manufacturing confidence dropped to 108.0 in July from 109.0 in June, which was revised down from 110.
- Singapore's consumer price inflation climbed 0.6% year-over-year in June, faster than the 0.4% increase in May. On a monthly basis, consumer prices went up 0.1% from May, when it grew by 0.6%.
- Hong Kong's consumer price inflation climbed 2.4% year-over-year in June, faster than the 2.1% rise in May.
- Taiwan's seasonally adjusted jobless rate edged down to 3.68% in June from 3.69% in May. The number of unemployed declined to 437,000 in June from 438,000 in the preceding month.

ECONOMIC NEWS

- Crude Oil traded at US\$ 68.25/ bbl (IST 17:00).
- INR weakened to Rs. 68.94 from Rs. 68.86 against each US\$ resulting in daily change of 0.13%.
- The number of patents filed by a US firm in India in 2016-17 was more than double of all patent applications from 50 labs under DRDO, more than 40 labs in IISc, 38 labs under CSIR, 31 NITs, 23 IITs and six major research facilities under Isro.
- GST Network (GSTN) is developing IT tools to help government crack down on evaders as well as those who have stopped filing returns.
- Overall exports from India to BRICS saw an upswing of 7.5% in the first quarter of 2018 over the corresponding period of last year in terms of total volumes.
- Niti Aayog suggested that all central public sector enterprises (CPSEs) should pool their CSR funds so that it could be used for development under its 'Aspirational Districts Programme'.

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 25/07/2018

- Larsen & Toubro Limited
- Hero MotoCorp Limited
- Ambuja Cements Limited
- JSW Steel Limited
- Bharti Infratel Limited
- Bharat Heavy Electricals Limited
- Canara Bank
- Crompton Greaves Consumer Electricals Limited
- Dishman Carbogen Amcis Limited
- Gruh Finance Limited
- Oriental Bank of Commerce
- Intellect Design Arena Limited
- JSW Steel Limited
- Jubilant Foodworks Limited
- Jyothy Laboratories Limited

Financial Results
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- Karur Vysya Bank Limited
- KPIT Technologies Limited
- Shriram City Union Finance Limited

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CORPORATE ACTIONS AS ON 25/07/2018

- Sobha Limited
- BSE Limited
- Akzo Nobel India Limited
- Carborundum Universal Limited
- Deepak Nitrite Limited
- EID Parry India Limited
- EIH Associated Hotels Limited
- Mahindra Holidays & Resorts India Limited
- Mahindra Logistics Limited
- Rane Holdings Limited
- Exide Industries Limited
- Magma Fincorp Limited

Dividend- Rs 7 Per Share
Dividend- Rs 31 Per Share
Dividend- Rs 22 Per Share
Dividend- Rs 1.25 Per Share
Dividend- Rs 1.30 Per Share
Dividend- Rs 3 Per Share
Dividend Rs 4.50/- Per Share
Dividend- Rs 4 Per Share
Dividend- Rs 1.50 Per Share
Dividend- Rs 9 Per Share
Dividend- Re 0.80 Per Share
Dividend- Re 0.80 Per Share

INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	11134.30	11084.75	0.45%
S&P BSE SENSEX	36825.10	36718.60	0.29%
NIFTY MID100 FREE	18496.70	18255.20	1.32%
NIFTY SML100 FREE	7246.80	7082.05	2.33%

EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	34563.31	31562.16
NSE F&O	874238.49	685818.85

PREVIOUS FII POSITIONS (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	259.37	-
NET SELL	-	721.52

SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	29954.09	29992.46	-0.13%
BSE IT	14668.40	14589.02	0.54%
BSE CG	18162.77	17708.77	2.56%
BSE OIL & GAS	14540.11	14401.56	0.96%
BSE FMCG	11613.95	11600.64	0.11%
BSE AUTO	24264.90	24038.15	0.94%
BSE HC	13960.95	13759.50	1.46%
BSE POWER	1946.85	1919.88	1.40%
BSE METAL	12263.26	11920.56	2.87%

TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
GRASIM	999.55	921.40	8.48%
HINDALCO	207.60	196.15	5.84%
IBULHSGFIN	1258.20	1197.15	5.10%
LT	1324.00	1279.15	3.51%
ULTRACEMCO	4136.80	4009.65	3.17%

ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	22510.48	22396.99	0.51%
HangSeng	28662.57	28256.12	1.44%
Straits Times	3292.65	3293.71	-0.03%
Shanghai	2905.56	2859.54	1.61%
Kospi	2280.20	2269.31	0.48%
Jakarta	5931.84	5915.80	0.27%
Taiwan	10995.39	10946.89	0.44%
KLSE Composite	1762.93	1757.96	0.28%
All Ordinaries	6355.20	6320.10	0.56%

TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
KOTAKBANK	1312.25	1337.05	-1.85%
HEROMOTOCO	3108.25	3165.45	-1.81%
BAJFINANCE	2713.35	2755.80	-1.54%
BAJAJFINSV	6827.70	6923.10	-1.38%
BAJAJ-AUTO	2648.65	2684.15	-1.32%

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EQUITIES

DERIVATIVES

COMMODITIES

DP SERVICES

MUTUAL FUNDS

RESEARCH