

MARKET WRAP UP

- Shares rose for a second straight session, tracking positive global stocks. The S&P BSE Sensex, rose 303.60 points or 0.89% to settle at 34,445.75. The Nifty 50 index gained 91.55 points or 0.87% to settle at 10,582.60.
- On BSE, 1,587 shares rose and 1,159 shares fell. A total of 196 shares were unchanged. The BSE Mid-Cap index rose 0.74%. The BSE Small-Cap index gained 0.88%.

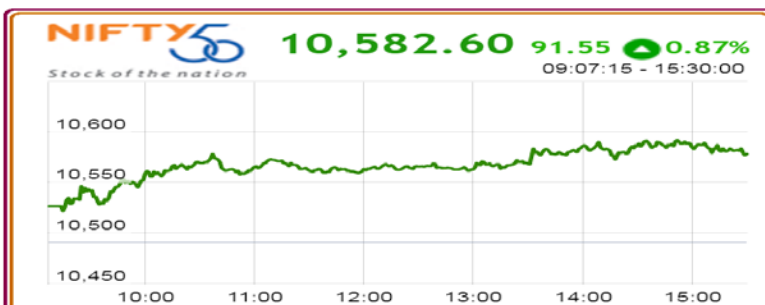
DERIVATIVES WATCH

- Nifty March series futures witnessed a fresh long position build up. Open Interest has been increased by 10556 contracts at the end of the day.
- Long position build up for the March series has been witnessed in RELIANCE, HD-FCBANK, HDFC.
- Short position build up for the March series has been witnessed in BHARTIARTL, INFY, TCS, MINDTREE.
- Unwinding of position for the March series has been witnessed in BIOCON, SUN-PHARMA.

CORPORATE NEWS

- Reliance Group** will be investing Rs. 50,000 crore in Andhra Pradesh in the electronics, the IT and the petroleum sectors in a phased manner. The MoUs were signed here on Sunday on the second day of the CII Partnership Summit.
- Bharti Airtel** has joined a new global collaboration to bring high-speed and uninterrupted in-flight data connectivity to mobile customers. The company has also entered into a pact with Motorola Mobility India to sell its budget fourth-generation smart phones under the company's 'mera pehla smartphone' initiative.
- Dr Reddy's** has announced that the company has received an unfavorable Established Inspection Report (EIR) for its API facility in Srikakulam.
- Sun Pharma** said that it has received 3 observations from the USFDA. While investors could have seen a decline in the number of observations from nine to three, this sheer comparison of the number of observations does not suffice that the plant is anywhere close to get an all clear from the USFDA.
- Lupin** announced the launch of its Testosterone Topical Solution, 30 mg per actuation having received an approval from the United States Food and Drug Administration (FDA) earlier.
- Strides Shasun** has announced that it will launch Ranitidine Tablets USP, 150 mg (OTC) in the US markets (gZantac). Strides is already present in the US Ranitidine Rx market and holds 32% market share.
- Sterlite Technologies** announced that it has been awarded a Rs 3500 crore advance purchase order to design, build and manage the Indian Navy's communications network.
- Berger Paints India Limited (BPIL)** is planning to set up an integrated plant at Sandila Industrial Area near Lucknow, Uttar Pradesh.
- Welspun Enterprises Ltd** has emerged as the lowest bidder (L-1) for NHAI project. The scope of the project involves six lanning of Walajapeth to Chinnaiyan Chathiram Section of NH-4 (New NH-48).
- Hindustan Zinc Ltd** is set to commission two new ore treatment mills in Rajasthan with a total capacity of 3mn tonnes.
- Jindal Steel and Power Ltd** is planning on setting up an iron ore mine in Namibia.
- SREI Infra** has signed memorandum of understanding with Uttar Pradesh government announcing a new co-operation agreement for redevelopment of Agra as an iconic tourist-cum-holiday destination.

INDEX CHART



GLOBAL NEWS

- China new home prices rose 5% in January from a year earlier and 0.3% month on month. Prices in December grew 5.3% on year and 0.4% on month.
- Spain's producer price inflation gained 0.1% annually in January, much weaker than the 1.7% increase seen in December. On a monthly basis, producer prices rose 0.2%, the same rate as seen in December.
- Singapore's inflation remained flat in January, following December's 0.4% increase, mostly due to lower accommodation and private road transport inflation. Month-on-month, consumer prices dropped 0.2% after easing 0.1% in December.
- Taiwan's unemployment rate dropped marginally to 3.68% in January from 3.7% in the previous month. In the same period of 2017, the rate stood at 3.84%. The number of unemployed decreased by 3,000 from the previous month to 430,000 in January. On an unadjusted basis, the jobless rate came in at 3.63% in January versus 3.66% in December.

ECONOMIC NEWS

- Crude Oil traded at US\$ 63.46/bbl (IST 17:00).
- INR weakened to Rs. 64.79 from Rs. 64.73 against each US\$ resulting in daily change of 0.09%.
- As per reports from Morgan Stanley and Reuters Poll, India's economic recovery is expected to have gathered momentum and GDP growth is likely to grow at its fastest pace at 7% in the December quarter as consumers, businesses and the government stepped up spending.
- A massive investment and trade summit with South Korea is expected to bring the who's who of Korean industry to Delhi. India will hard sell itself as the next big investment destination for the East Asian nation.
- The state government has issued notices to 136 sugar mills for defaulting on payments to farmers. These mills have piled up Rs 2,230 crore arrears for the current crushing season and the amount is likely to rise in the next few months, say industry insiders.
- India called for bringing changes in Geneva-based World Trade Organisation (WTO) to transform the global economy. Commerce and Industry Minister Suresh Prabhu said that the global trade has benefitted all the nations in terms of creation of jobs and promoting economic activities.

DAILY ROUND-UP

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 27/02/2018

- Oil & Natural Gas Corporation Limited Dividend
- Tilaknagar Industries Limited Financial Results

CORPORATE ACTIONS AS ON 27/02/2018

- OM Metals Infraprojects Ltd Interim Dividend - Re 0.35 Per Share

Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10582.60	10491.05	0.87%
S&P BSE SENSEX	34445.75	34142.15	0.89%
NIFTY MID100 FREE	19854.75	19708.40	0.74%
NIFTY SML100 FREE	8394.25	8342.85	0.62%

Exchange Turnover

Market	Current	Previous
NSE Cash	29176.42	32327.68
NSE F&O	429229.27	410334.60

Previous FII Positions (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	-	5316.05
NET SELL	486.32	-

Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	29001.66	28535.80	1.63%
BSE IT	12367.78	12504.85	-1.10%
BSE CG	19236.89	18890.97	1.83%
BSE OIL & GAS	15524.17	15382.45	0.92%
BSE FMCG	10559.86	10562.66	-0.03%
BSE AUTO	24868.36	24327.53	2.22%
BSE HC	14219.50	14225.36	-0.04%
BSE POWER	2234.45	2213.66	0.94%
BSE METAL	15482.80	15327.90	1.01%

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MARUTI	9005.35	8698.80	3.52%
TATAMOTORS	372.05	360.20	3.29%
LT	1344.25	1301.70	3.27%
AXISBANK	552.30	536.65	2.92%
INDUSINDBK	1691.30	1643.50	2.91%

Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	22153.63	21892.78	1.19%
HangSeng	31498.60	31267.17	0.74%
Straits Times	3555.85	3533.22	0.64%
Shanghai	3329.57	3289.02	1.23%
Kospi	2457.65	2451.52	0.25%
Jakarta	6554.67	6619.80	-0.98%
Taiwan	10836.70	10794.55	0.39%
KLSE Composite	1860.08	1861.50	-0.08%
All Ordinaries	6146.10	6105.20	0.67%

Top Losers

SCRIP NAME	Close	Previous	Change (%)
SUNPHARMA	555.95	569.65	-2.40%
INFY	1138.60	1155.65	-1.48%
TECHM	612.45	621.45	-1.45%
TCS	3031.70	3075.80	-1.43%
WIPRO	291.60	295.00	-1.15%

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