

## MARKET WRAP UP

- Key indices settled with modest gains after a volatile session of trade with sentiment boosted after the ruling party at the Centre, BJP's massive win in the Delhi civic elections. Firmness in Asian stocks provided support during initial part of the session. The S&P BSE Sensex, rose 190.11 points or 0.63% to settle at 30,133.35. The Nifty 50 index gained 45.25 points or 0.49% to settle at 9,351.85. The Sensex hit record high above 30,000-mark. The Nifty also scaled record high. Key indices gained for the third day in a row today, 26 April 2017.
- The BSE Mid-Cap index declined 0.12%. The BSE Small-Cap index dropped 0.63%.

## DERIVATIVES WATCH

- Nifty May series futures witnessed a fresh long position build up. Open Interest has been increased by 54135 contracts at the end of the day.
- Long position build up for the May series has been witnessed in BHARTIARTL, ICICIBANK, HDFCBANK.
- Short position build up for the May series has been witnessed in RELIANCE, SBIN, INFY.

## CORPORATE NEWS

- LIC Housing Finance** posted an 18% rise in Q4 net profit at Rs 529.19 cr vs Rs 448 cr. Its net interest income (NII) grew by 27% to Rs 1,040 cr in Q4. Net interest margins for Q4 FY17 stood at 2.97% against 2.71% for Q4 FY16.
- Wipro** posted Q4 consolidated net profit jumped 7.19% on quarter-on-quarter basis to Rs 2,267 cr vs Rs 2,114.80 cr (QoQ). Total income of Rs 15,033.80 cr, up 4.87%, against Rs 14,336.40 cr. The board of the company also recommended a bonus shares in ratio 1:1.
- Zensar Technologies** reported an 84.44% fall in Q4 consolidated net profit at Rs 10.73 cr vs Rs 68.96 cr (YoY). Its total income from operations fell by 0.12% to Rs 743.77 cr vs Rs 744.71 cr.
- IDFC Bank** Q4 net profit rose by 7% at Rs176 cr vs Rs165.10 cr. Income during the quarter grew by a marginal 1% to Rs558.40 cr, as against Rs554.50 cr.
- Eicher Motors JV** (VE Commercial Vehicle) eyes 10% growth in FY18, to invest Rs500 crore for BS-VI technology.
- Brigade Enterprise** is planning to raise up to Rs500 crore through private placement of shares to institutional investors by way of Qualified Institutional Placement (QIP).
- Dilip Buildcon** has bagged three road projects worth Rs 3,269 crore in Maharashtra.
- Indian Oil Corp** has received green nod for upgradation of its Bongaigaon refinery for production of BS-VI grade fuels in Assam at a cost of Rs 4,185 crore.
- Oil India Limited's** crude oil production grew strongly by 9.06% YoY and that of ONGC by 3.32% YoY in March-2017.
- NIIT Technologies** announced collaboration of Siam City Cement with the company to build its future ready IT infrastructure.
- Aurobindo Pharma** and **Alkem** gets approval for gBenicar (olmesartan medoxomil), used to treat hypertension.
- Kolte-Patil Developers** has strengthened its Mumbai presence by signing its largest private society redevelopment project till date, Dahisar shree Avadhoot Co-operative Housing Society, having a plot area of 15,035 square meters.
- Zensar Technologies Limited** has recommended a dividend of Rs 7 per equity share.

## INDEX CHART



## GLOBAL NEWS

- China's unemployment rate fell to 3.97% and 3.34 million jobs were created in the first quarter of the year. The unemployment rate dropped 0.05% points from the previous quarter and 0.07% points from a year ago. The job creation figure was 160,000 higher than that in the same period last year.
- U.S. new home sales jumped by 5.8% to an annual rate of 621,000 in March from a revised 587,000 in February.
- U.S. house-price index rose 0.8% for February compared with expectations of a 0.2% gain and the January. The year-on-year increase accelerated to 6.4% from 5.7% previously.
- U.S. Conference Board said its consumer confidence index fell to 120.3 in April from a revised 124.9 in March.
- French consumer sentiment remained stable at 100, its long-term average, for the fourth consecutive month in April.
- Hong Kong's exports surged 16.9% year-over-year in March. However, it was slower than the 18.4% growth in February. Imports climbed 13.0% annually in March, following a 25.4% jump in the prior month. As a result, the visible trade deficit narrowed to HK\$42.3 billion in March from HK\$47.01 billion in the corresponding month last year.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 49.26/bbl (IST 17:00).
- INR strengthened to Rs. 64.12 from Rs. 64.27 against each US\$ resulting in daily change of 0.23%.
- India's LNG imports grew sharply by 18% YoY (-2.6% MoM) to 1.57mmt in March-2017. For FY17, the LNG imports grew strongly by 15.5% YoY to 18.6mmt.
- The government has initiated a probe on alleged dumping of a chemical used in pharmaceutical and agriculture sector from Indonesia, Malaysia, Thailand and Saudi Arabia.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 27/04/2017

• Axis Maruti Suzuki India Limited	Results/Dividend
• Kotak Mahindra Bank Limited	Results/Dividend
• Biocon Limited	Results/Dividend
• Reliance Capital Limited	Results/Dividend
• Shriram Transport Finance Company Limited	Results/Dividend
• Motilal Oswal Financial Services Limited	Results/Dividend
• Syngene International Limited	Results/Dividend
• Indiabulls Real Estate Limited	Results
• Indiabulls Ventures Limited	Results
• Kokuyo Camlin Limited	Results/Dividend
• Mahindra CIE Automotive Limited	Results
• Tata Elxsi Limited	Results/Dividend
• TVS Motor Company Limited	Results

• Ujivan Financial Services Limited	Results/Dividend
• Hatsun Agro Product Limited	Results/Dividend
• HIL Limited	Results/Dividend

### CORPORATE ACTIONS AS ON 27/04/2017

• Mold-Tek Technologies Limited	Interim Dividend Re 0.30 Per Share
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## Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	9306.60	9217.95	0.96%
S&P BSE SENSEX	29943.24	29655.84	0.97%
NIFTY MID100 FREE	18062.20	17910.25	0.85%
NIFTY SML100 FREE	7489.95	7431.45	0.79%

## Exchange Turnover

Market	Current	Previous
NSE Cash	29310.01	25925.59
NSE F&O	599422.43	566012.09

## Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	-	2212.66
NET SELL	279.55	-

## Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	25003.33	24748.18	1.03%
BSE IT	9739.74	9721.26	0.19%
BSE CG	17872.85	17727.32	0.82%
BSE OIL & GAS	14565.28	14388.93	1.23%
BSE FMCG	9405.80	9251.56	1.67%
BSE AUTO	22435.44	22180.32	1.15%
BSE HC	15194.16	15095.26	0.66%
BSE POWER	2343.52	2332.02	0.49%
BSE METAL	11199.40	11131.97	0.61%

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
INFRATEL	375.25	358.25	4.75%
AXISBANK	516.40	498.65	3.56%
IOC	436.50	421.90	3.46%
BPCL	739.35	714.85	3.43%
M&M	1307.45	1264.60	3.39%

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	19079.33	18875.88	1.08%
HangSeng	24455.94	24139.48	1.31%
Straits Times	3163.93	3144.03	0.63%
Shanghai	3134.57	3129.53	0.16%
Kospi	2196.85	2173.74	1.06%
Jakarta	5680.80	5664.48	0.29%
Taiwan	9841.71	9717.95	1.27%
KLSE Composite	1765.80	1756.05	0.56%
All Ordinaries	5900.70	5885.60	0.26%

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATAPOWER	85.20	86.00	-0.93%
CIPLA	552.95	557.05	-0.74%
AUROPHARMA	622.80	627.35	-0.73%
TCS	2311.50	2328.10	-0.71%
NTPC	165.45	166.55	-0.66%

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