

## MARKET WRAP UP

- Key benchmark indices settled with small gains after volatile session as firmness in European stocks supported gains on the bourses. The S&P BSE Sensex rose 104.63 points or 0.32% at 33,147.13. The Nifty 50 index advanced 48.45 points or 0.47% at 10,343.80. The Sensex and Nifty scaled fresh record high. Market gained for the fourth straight session. Volatility was witnessed during the session as near month derivatives contracts expired today, 26 October 2017.
- The S&P BSE Mid-Cap index rose 0.52%. The S&P BSE Small-Cap index gained 0.57%.

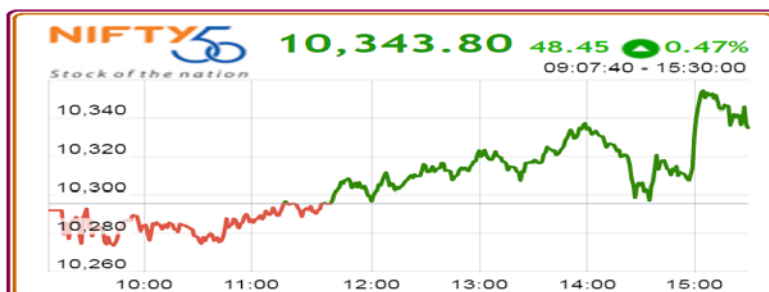
## DERIVATIVES WATCH

- Nifty November series futures witnessed a fresh long position build up. Open Interest has been increased by 123674 contracts at the end of the day.
- Long position build up for the November series has been witnessed in RELIANCE, HDFC, INFY.
- Short position build up for the November series has been witnessed in SBIN, ICICIBANK, TATAMOTORS.

## CORPORATE NEWS

- Mindtree** reported 31.5% increase in net profit to Rs 124.7 crore in the second quarter ended September 30, 2017. The company had posted a net profit of Rs 94.8 crore in the same period a year ago. The total income of Mindtree rose six% to Rs 1,391.4 crore in July-September quarter from Rs 1,312.4 crore in the same period of previous fiscal.
- Yes Bank** has reported a profit growth of 25% year-on-year at Rs 1,002.7 crore despite sharp spike in provisions, but asset quality deteriorated on sequential basis. Profit in quarter ended September 2017 stood at Rs 801.54 crore. Net interest income shot up 33.5% to Rs 1,885.1 crore compared with Rs 1,412.16 crore in same quarter last fiscal.
- L&T Finance Holdings'** second quarter (July-September) consolidated profit grew by 45% year-on-year to Rs 360 crore.
- PNB Housing Finance** reported a 51% jump in net profit to Rs 208 crore for the second quarter ended September. It had earned a profit of Rs 138 crore in the July-September quarter of the last financial year. The company's total income for the quarter under review stood at Rs 1,316 crore, up from Rs 970 crore in the year-ago period
- Jubilant Foodworks** consolidated revenue for the quarter came in at Rs. 726.6 crore, registering 9.2% yoy increase. The PAT for the quarter came in at Rs. 48.5 crore, yoy increase of 124.5%. This was due to decrease in depreciation expense by 11.1%
- Vijaya Bank's** September quarter net profit grew by 20% at Rs 185.5 crore against Rs 154.5 crore reported during the same period last year. The bank's net interest income-difference between interest earned and appended- rose by 22% at Rs 1,008.4 crore against Rs 827.8 crore year on year.
- Whirlpool of India** reported a 25.08% increase in net profit at Rs 73.45 crore for the quarter ended September 30. The company had posted a net profit of Rs 58.72 crore in the corresponding period last year. Total income during the second quarter went up by 24% to Rs 1,187.35 crore from Rs 957.53 crore in the year-ago period
- Tata Communications** today registered consolidated loss of Rs 250 crore in the September quarter of 2017-18, chiefly because of its investment in sister concern Tata Teleservices. The company had posted profit of Rs 39.96 crore in the same period a year ago. Consolidated revenue declined 7.31% to Rs 4,218 crore in the reported quarter, from Rs 4,509 crore in the previous fiscal.
- Engineers India** 's PAT increased by 27% to Rs 119 crore in Q2 FY18. The company's standalone revenue for the quarter came in at Rs 429 crore, registering 26.6% yoy increase.

## INDEX CHART



## GLOBAL NEWS

- U.S. durable goods orders rose by 2.2% in September. Economists had expected the figure to rise by 1.0%. Core durable goods orders were up 0.7% in the month.
- U.S. new home sales surged up by 18.9% to an annual rate of 667,000 in September from a revised rate of 561,000 in August.
- German GfK forward-looking consumer sentiment index fell unexpectedly to 10.7 in November from 10.8 in October.
- South Korea's gross domestic product climbed a seasonally adjusted 1.4% on quarter in the third quarter of 2017, up from 0.6% in the three months prior. On a yearly basis, GDP advanced 3.6% - up from 2.7% in the second quarter.
- Singapore's industrial production expanded strongly by 14.6% year-over-year in September, but slower than the 19.5% surge in August. Month-on-month, manufacturing output dropped a seasonally adjusted 0.5% from August, when it rose by 0.6%.

## ECONOMIC NEWS

- Crude Oil traded at US\$ 52.18/bbl (IST 17:00).
- INR strengthened to Rs. 64.82 from Rs. 65.02 against each US\$ resulting in daily change of 0.31%.
- The government is all set to launch 150 projects on Ganga by March, Union Minister Nitin Gadkari said on Thursday while asking investors to join hands with the Centre in cleaning of the river.
- Government think-tank Niti Aayog has recommended strategic disinvestment of 34 sick public sector units so far, its CEO Amitabh Kant said. The Prime Minister's Office (PMO) had asked the think-tank to look into the viability of sick state-run companies.

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## FORTHCOMING EVENT

### BOARD MEETINGS AS ON 27/10/2017

• Maruti Suzuki India Limited	Results
• ICICI Bank Limited	Results
• ITC Limited	Results
• Indian Oil Corporation Limited	Results
• Canara Bank	Results
• Tata Metaliks Limited	Results
• The Jammu & Kashmir Bank Limited	Results
• Aditya Birla Fashion & Retail Ltd	Results/Others
• AU Small Finance Bank Limited	Results
• HeidelbergCement India Limited	Results
• IFB Agro Industries Limited	Results

• INEOS Styrolution India Limited	Results
• Jubilant Industries Limited	Results
• Kaveri Seed Company Limited	Results
• Linde India Limited	Results
• Munjal Showa Limited	Results
• Navin Fluorine International Limited	Results/Dividend
• PVR Limited	Results
• Srikalahasthi Pipes Limited	Results
• SPARC Limited	Results
• Sundaram Finance Limited	Results

## Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10343.80	10295.35	0.47%
S&P BSE SENSEX	33147.13	33042.50	0.32%
NIFTY MID100 FREE	19341.40	19212.10	0.67%
NIFTY SML100 FREE	8353.60	8306.85	0.56%

## Exchange Turnover

Market	Current	Previous
NSE Cash	52070.09	55954.18
NSE F&O	1484650.78	1202397.62

## Previous FII Positions ( IN CRORE )

ACTIVITIES	Cash	F&O
NET BUY	3582.50	1051.27
NET SELL	-	-

## Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	28330.19	28329.12	0.004%
BSE IT	10408.55	10407.20	0.01%
BSE CG	18285.81	18058.48	1.26%
BSE OIL & GAS	16556.76	16201.98	2.19%
BSE FMCG	10254.68	10252.77	0.02%
BSE AUTO	25091.85	24937.63	0.62%
BSE HC	13917.05	13835.04	0.59%
BSE POWER	2338.26	2327.85	0.45%
BSE METAL	15039.39	14734.05	2.07%

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
BPCL	536.45	509.80	5.23%
IOC	436.50	417.25	4.61%
HPCL	481.20	462.50	4.04%
CIPLA	611.50	592.65	3.18%
MARUTI	8068.05	7870.20	2.51%

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	21739.78	21707.62	0.15%
HangSeng	28202.38	28302.89	-0.36%
Straits Times	3356.25	3343.88	0.37%
Shanghai	3407.57	3396.90	0.31%
Kospi	2480.63	2492.50	-0.48%
Jakarta	5995.85	6025.43	-0.49%
Taiwan	10734.76	10750.57	-0.15%
KLSE Composite	1736.80	1739.05	-0.13%
All Ordinaries	5978.60	5972.70	0.10%

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
HCLTECH	869.05	907.05	-4.19%
IBULHSGFIN	1248.25	1276.70	-2.23%
ICICIBANK	299.25	305.70	-2.11%
POWERGRID	212.00	216.10	-1.90%
AMBUJACEM	276.45	281.75	-1.88%

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