

MARKET WRAP UP

- Key benchmark indices logged strong gains in steady session of trade. The S&P BSE Sensex, gained 352.21 points or 0.95% at 37336.85. The Nifty 50 index gained 111.05 points or 0.99% at 11,278.35. Positive global stocks boosted sentiment on the domestic bourses.
- The S&P BSE Mid-Cap index rose 0.95%. The S&P BSE Small-Cap index rose 0.88%.

DERIVATIVES WATCH

- Nifty August series futures witnessed a fresh long position build up. Open Interest has been increased by 28999 contracts at the end of the day.
- Long position build up for the August series has been witnessed in RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK, HDFC.
- Short position build up for the August series has been witnessed in INFY, MARUTI, MARICO, COALINDIA.
- Unwinding of position for the August series has been witnessed in HEROMOTOCO, BAJAJ-AUTO, SRTRANSFIN.

CORPORATE NEWS

- Bharti Airtel** has reported a consolidated total income from operations of Rs 20,080 crore and a net profit of Rs 97.30 crore for the quarter ended Jun'18. For the quarter ended Mar 2018 the consolidated total income from operations was Rs 19,634.30 crore and net profit was Rs 419.00 crore.
- ITC** reported 10.08% year-on-year (YoY) increase in net profit at Rs 2,819 crore for the first quarter of FY19. During the review period, net sales stood at Rs 10,874 crore, up 9.20% on year. The revenue from cigarettes and FMCG business stood at Rs 5,127.59 crore and Rs 2,870 crore, respectively, for the June quarter.
- JSW Steel** has reported a consolidated total income from operations of Rs 20,519 crore and a net profit of Rs 2,366 crore for the quarter ended Jun-2018. For the quarter ended Jun 2017 the consolidated total income from operations was Rs 14,699.00 crore and net profit was Rs 626.00 crore.
- CESC Ltd** reported a 2% on-year rise in its standalone net profit for the June quarter to Rs 182 crore. Operational revenue during the reporting quarter was down to Rs 2,159 crore compared with Rs 2,184 crore in the corresponding period of the 2017-18 fiscal, the company said in a release.
- Biocon** reported 21.2% yoy growth in revenue to Rs 1,123.8cr. PAT grew by 47.2% yoy to Rs 119.7cr in Q1FY19 vs. 81.3cr in Q1FY18.
- Alembic Pharmaceuticals** has reported healthy earnings performance for the quarter ended June 2018 as consolidated profit shot up 35.7% on growth across territories. Profit increased to Rs 90.5 crore compared to Rs 66.7 crore in same period last fiscal. Consolidated revenue from operations surged 33.1% year-on-year to Rs 862.5 crore in April-June quarter.
- Equitas Holdings'** first quarter profit grew by 127% year-on-year to Rs 35.4 crore. Profit in the year-ago period stood at Rs 15.6 crore. Revenue from operations increased 19.7% to Rs 543.4 crore compared to Rs 454 crore in corresponding period last year, backed by loan growth of 27% to Rs 8,926 crore YoY.
- Shoppers Stop** reported a net profit of Rs 9.77 crore for the quarter ended June 30, 2018, as against a net loss of Rs 3.71 crore in the corresponding quarter a year ago. Total income during the quarter under review stood at Rs 833.72 crore. It was Rs 946.44 crore in the year-ago period. The company said revenue for quarter ended June 30, 2017, is strictly not comparable with quarter ended June 30, 2018
- Petronet LNG Ltd** has submitted a firm proposal to set up an LNG import facility in Bangladesh at an investment of about USD 1 billion.
- Lupin** announced the launch of Desoximetason Topical Spray, used for treatment of plaque psoriasis, in the US market.

INDEX CHART



GLOBAL NEWS

- China's industrial profit surged 20.0% year-over-year in May, slower than the 21.1% increase in April.
- U.S. initial jobless claims rose to 217,000 in the week ended July 21st, an increase of 9,000 from the previous week's revised level of 208,000. Continuing claims fell by 8,000 to 1.745 million in the week ended July 14th.
- U.S. durable goods orders jumped by 1.0% in June after falling by a revised 0.3% in May. Core durable goods orders rose by 0.4% in June after rising by 0.3% in the previous month.
- U.S. goods trade deficit shot up 5.5 percent in June to \$68.3 billion. Goods exports dropped 1.5 percent to \$141.9 billion last month while imports of goods rose by \$1.3 billion to \$210.3 billion.
- European Central Bank left its interest rates unchanged and maintained the forward guidance on monetary stimulus. The main refi rate is currently at a record low 0% and the deposit rate at -0.40%. The marginal lending facility rate is 0.25%. The Governing Council will continue to make net purchases under the asset purchase programme (APP) at the current monthly pace of EUR 30 billion until the end of September 2018.

ECONOMIC NEWS

- Crude Oil traded at US\$ 69.54/ bbl (IST 17:00).
- INR remained almost flat to Rs. 68.66.
- The foreign direct investment in the food processing sector rose 24% in 2017-18 to USD 904.9 million, according to an official data. FDI inflow into the sector stood at USD 727.22 million during 2016-17 financial year. The sector attracted FDI worth USD 505.88 million and USD 515.86 million in 2015-16 and 2014-15 respectively, the data showed.
- India's milk production is estimated to have increased by 6.6% to 176.35 million tonnes during the last financial year. Milk production in the country is 165.4 million tonnes during 2016-17 and 176.35 million tonnes (provisional) during 2017-18.
- The government has notified a decision to allow sugar mills to manufacture ethanol directly from sugarcane juice or intermediate product called B-molasses. The sugarcane control order of 1966 has been amended in this regard and the same has been notified by the Union Food Ministry.

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 28/07/2018

- NTPC Limited
- Persistent Systems Limited
- Unichem Laboratories Limited
- Central Depository Services (India) Limited
- JK Cement Limited
- Balmer Lawrie & Company Limited
- Godawari Power And Ispat limited
- Lumax Auto Technologies Limited
- Lumax Industries Limited

BOARD MEETINGS AS ON 30/07/2018

- HDFC Limited
- Axis Bank Limited
- Tech Mahindra Limited
- Avenue Supermarts Limited
- Shree Cement Limited

Financial Results

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- Escorts Limited

CORPORATE ACTIONS AS ON 30/07/2018

- Lupin Limited
- PI Industries Limited
- Zensar Technologies Limited
- Avanti Feeds Limited
- Asahi India Glass Limited
- AU Small Finance Bank Limited
- Dhanuka Agritech Limited
- Dhunseri Tea & Industries Limited
- JMC Projects (India) Limited
- Kalpataru Power Transmission Limited
- Nava Bharat Ventures Limited
- NCC Limited
- Tube Investments of India Limited
- Wonderla Holidays Limited

Financial Results

Dividend Rs 5/- Per Share

Dividend- Rs 2.50 Per Share

Dividend - Rs 7 Per Share

Dividend- Re 6 Per Share

Dividend- Rs 1.50 Per Share

Dividend- Re 0.50 Per Share

Dividend- Rs 3.50 Per Share

Dividend- Rs 8 Per Share

Dividend- Rs 3 Per Share

Dividend- Rs 2.5 Per Share

Dividend Rs 1.50/- Per Share

Dividend- Re 1 Per Share

Dividend- Re 0.50 Per Share

Dividend- Rs 1.50 Per Share

INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	11278.35	11167.30	0.99%
S&P BSE SENSEX	37336.85	36984.64	0.95%
NIFTY MID100 FREE	18781.45	18614.25	0.90%
NIFTY SML100 FREE	7402.85	7318.80	1.15%

EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	33484.76	43977.30
NSE F&O	415201.42	1781228.45

PREVIOUS FII POSITIONS (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	2453.57	-
NET SELL	-	19.54

SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	30743.13	30426.14	1.04%
BSE IT	14516.97	14519.87	-0.02%
BSE CG	18164.60	18051.61	0.63%
BSE OIL & GAS	14838.94	14591.96	1.69%
BSE FMCG	11892.60	11655.20	2.04%
BSE AUTO	24269.32	24087.84	0.75%
BSE HC	14027.71	13965.09	0.45%
BSE POWER	1951.17	1944.89	0.32%
BSE METAL	12511.06	12278.88	1.89%

TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
ITC	302.55	287.20	5.34%
IOC	165.40	158.80	4.16%
TATAMOTORS	268.15	258.25	3.83%
TITAN	884.10	854.50	3.46%
HINDALCO	213.40	206.55	3.32%

ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	22712.75	22586.87	0.56%
HangSeng	28804.28	28781.14	0.08%
Straits Times	3324.98	3328.60	-0.11%
Shanghai	2873.59	2882.23	-0.30%
Kospi	2294.99	2289.06	0.26%
Jakarta	5989.14	5946.14	0.72%
Taiwan	11075.78	11010.61	0.59%
KLSE Composite	1769.14	1766.23	0.16%
All Ordinaries	6391.50	6337.60	0.85%

TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	2083.20	2132.75	-2.32%
BAJAJFINSV	6927.20	7035.30	-1.54%
ADANIPTS	394.65	399.30	-1.16%
COALINDIA	262.15	265.10	-1.11%
POWERGRID	179.90	181.85	-1.07%

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EQUITIES

DERIVATIVES

COMMODITIES

DP SERVICES

MUTUAL FUNDS

RESEARCH