

MARKET WRAP UP

- Key equity indices ended flat after alternately swinging between positive and negative zone throughout the trading session. The S&P BSE Sensex, ended down 1.25 points at 35,591.25. The Nifty 50 index fell 0.40 points at 10,651.80.
- The S&P BSE Mid-Cap index rose 0.22%. The S&P BSE Small-Cap index rose 0.78%.

DERIVATIVES WATCH

- Nifty February series futures witnessed a fresh short position build up. Open Interest has been increased by 47140 contracts at the end of the day.
- Long position build up for the February series has been witnessed ICICIBANK, HCLTECH.
- Short position build up for the February series has been witnessed in RELIANCE, HDFCBANK, HDFC.

CORPORATE NEWS

- Axis Bank** reported 131% jump in its Q3FY19 net profit at Rs 1,681 crore. The company had reported profit of Rs 726.44 crore in a year ago period. NII was up 18% at Rs 5603.6 crore versus Rs 4,732 crore in Q3FY18.
- Bajaj Auto** has registered 15.7% growth in its Q3 net profit at Rs 1101.9 crore against profit of Rs 952.44 crore in the same quarter last fiscal. Revenue of the company at Rs 7409.4 crore and other income was Rs 470 crore against Rs 208.6 crore, YoY.
- Indian Oil Corporation** has reported a fall of 78% in its net profit for the December quarter to Rs 716 crore against Rs 3,247 crore that the company reported last quarter. Its revenues grew 6% to Rs 1.6 lakh crore against Rs 1.5 lakh crore last quarter.
- Bank Of Baroda** posted NII at Rs 4,743.23 crore in December 2018 up 7.95% from Rs. 4394.03 crore in December 2017. Net profit at Rs. 471.25 crore in December 2018 up 321.59% from Rs. 111.78 crore in December 2017.
- Godrej Consumer Products** reported a 1.4% dip in consolidated net profit to Rs 423.52 crore in the third quarter ended December 2018. The company had recorded a profit of Rs 429.87 crore in the same quarter a year ago. Total income increased by around 3% to Rs 2,744.57 crore during the quarter, compared with Rs 2,666.23 crore in the corresponding quarter of 2017-18.
- Bajaj Finserv** posted consolidated net sales at Rs 11,141.05 crore in December 2018 up 45.34% from Rs. 7,665.40 crore in December 2017. Net profit at Rs. 850.52 crore in December 2018 up 13.62% from Rs. 748.59 crore in December 2017.
- Granules India** posted consolidated net sales at Rs 631.78 crore in December 2018 up 53.82% from Rs. 410.73 crore in December 2017. Net profit at Rs. 60.32 crore in December 2018 up 72.26% from Rs. 35.02 crore in December 2017.
- Jubilant Foodworks** reported 46% jump in its Q3FY19 net profit at Rs 96.5 crore. The company had reported profit of Rs 66 crore in the same quarter last fiscal. Revenue of the company rose 16.8% at Rs 929.1 crore against Rs 795.2 crore.
- Tata Coffee** consolidated net sales at Rs 465.37 crore in December 2018 up 23.41% from Rs. 377.09 crore in December 2017. Net profit at Rs. 11.23 crore in December 2018 down 86.73% from Rs. 84.61 crore in December 2017.
- Tata Steel BSL Limited** posted net sales at Rs 4,888.54 crore in December 2018 up 10.91% from Rs. 4,407.71 crore in December 2017. Net loss at Rs. 239.56 crore in December 2018 up 85.09% from Rs. 1,607.06 crore in December 2017.
- Ramco Cements** reported a decline of 17.65% in standalone net profit to Rs 101.07 crore for the third quarter ended December 31. The company had posted a net profit of Rs 122.74 crore in the same period of previous fiscal. Total income during the quarter under review was up 14.64% to Rs 1,216.99 crore as against Rs 1,061.52 crore in the year-ago period.

INDEX CHART



GLOBAL NEWS

- U.S. Conference Board said its consumer confidence index slumped to 120.2 in January after tumbling to a revised 126.6 in December.
- Eurozone economic sentiment slipped to 106.2 points in January from a slightly revised 107.4 in December. The mood of consumers picked up to -7.9 after December's steep fall to -8.3.
- Germany's forward-looking GfK consumer confidence indicator for February rose to 10.8 in February from a revised 10.5 in January.
- France's gross domestic product grew 0.3% quarter-on-quarter in the fourth quarter, same as in the third quarter.
- France's household spending on goods decreased 1.5% monthly in December after a 0.1% drop in November.
- French consumer confidence rose to 91 in January 2019 from a downwardly revised 86 in December.

ECONOMIC NEWS

- Crude Oil traded at US\$ 53.71/ bbl (IST 17:00).
- INR weakened to Rs. 71.12 from Rs. 71.11 against each US\$ resulting in daily change of 0.01%.
- The Centre has struck down reports of a full Budget being announced on February 1. The provisional calendar released by the Lok Sabha has categorised the event as Interim Budget.
- The Department of Industrial Policy and Promotion (DIPP) has been renamed as the Department for Promotion of Industry and Internal Trade with a mandate to deal with matters related to start-ups, facilitating ease of doing business among others.
- Confederation of All India Traders (CAIT) warned the government of a national campaign with a political fallout if it defers the implementation of foreign investment norms in e-commerce from February 1.
- Domestic ratings agency India Ratings expects the interim budget to announce an income support scheme for the poor which may at least cost the Centre Rs 1.5 trillion per annum or 0.7 percent of the GDP for the Centre and states combined and is better than any farm loan waivers.

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 31/01/2019

Bharti Airtel Limited	Financial Results
Hero MotoCorp Limited	Financial Results/Dividend
Power Grid Corporation of India Limited	Financial Results
Indiabulls Housing Finance Limited	Financial Results/Dividend
UPL Limited	Financial Results
Vedanta Limited	Financial Results
V-Guard Industries Limited	Financial Results
Dabur India Limited	Financial Results
Emami Limited	Financial Results
Accelya Kale Solutions Limited	Financial Results/Dividend
eClerx Services Limited	Financial Results
EIH Associated Hotels Limited	Financial Results
HSIL Limited	Financial Results
IFB Industries Limited	Financial Results
Jamna Auto Industries Ltd	Financial Results

Jubilant Industries Limited	Financial Results
Magma Fincorp Limited	Financial Results
Narayana Hrudayalaya Ltd.	Financial Results
NMDC Limited	Financial Results
Petronet LNG Limited	Financial Results
Solar Industries India Limited	Financial Results
Srikalahasthi Pipes Limited	Financial Results

CORPORATE ACTIONS AS ON 31/01/2019

Coromandel International Limited	Interim Dividend - Rs 3 Per Share
Hatsun Agro Product Limited	Interim Dividend - Rs 2 Per Share
JM Financial Limited	Interim Dividend - Re 0.50 Per Share
Rane (Madras) Limited	Interim Dividend - Rs 4 Share
RNLAM Ltd	Interim Dividend - Rs 3 Per Share
Sundaram Clayton Limited	Interim Dividend - Rs 20 Per Share
Wendt (India) Limited	Interim Dividend - Rs 15 Per Share
Zensar Technologies Limited	Interim Dividend - Re 1 Per Share

INDIAN MARKETS

Indices	Close	Previous	Change (%)
NIFTY 50	10651.80	10652.20	-0.004%
S&P BSE SENSEX	35591.25	35592.50	-0.004%
NIFTY MID100 FREE	16792.30	16706.55	0.51%
NIFTY SML100 FREE	6095.80	6060.35	0.58%

EXCHANGE TURNOVER

Market	Current	Previous
NSE Cash	34974.93	33411.02
NSE F&O	1119139.26	855503.65

PREVIOUS FII POSITIONS (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	-	-
NET SELL	354.36	364.22

SECTORAL INDICES

Indices	Close	Previous	Change (%)
BSE BANKEX	30217.43	29811.24	1.36%
BSE IT	14945.87	14943.81	0.01%
BSE CG	17120.15	16919.90	1.18%
BSE OIL & GAS	13381.23	13496.32	-0.85%
BSE FMCG	11465.85	11576.53	-0.96%
BSE AUTO	18278.90	18292.67	-0.08%
BSE HC	13763.04	13760.43	0.02%
BSE POWER	1863.46	1862.88	0.03%
BSE METAL	10814.76	10614.66	1.89%

TOP GAINERS

SCRIP NAME	Close	Previous	Change (%)
ICICIBANK	365.90	346.85	5.49%
TATASTEEL	467.45	443.80	5.33%
AXISBANK	690.95	660.75	4.57%
BAJFINANCE	2595.50	2515.55	3.18%
HINDALCO	205.80	199.55	3.13%

ASIA PACIFIC MARKETS

Indices	Close	Previous	Change (%)
Nikkei225	20556.54	20664.64	-0.52%
HangSeng	27642.85	27531.68	0.40%
Straits Times	3174.38	3187.69	-0.42%
Shanghai	2575.58	2594.25	-0.72%
Kospi	2206.20	2183.36	1.05%
Jakarta	6464.19	6436.48	0.43%
Taiwan	9932.26	9931.59	0.01%
KLSE Composite	1684.11	1690.41	-0.37%
All Ordinaries	5951.20	5939.50	0.20%

TOP LOSERS

SCRIP NAME	Close	Previous	Change (%)
IBULHSGFIN	672.90	698.60	-3.68%
ADANI PORTS	338.15	349.25	-3.18%
BAJAJ-AUTO	2499.70	2567.65	-2.65%
INFRATEL	290.30	297.35	-2.37%
KOTAKBANK	1222.20	1251.40	-2.33%

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EQUITIES

DERIVATIVES

COMMODITIES

DP SERVICES

MUTUAL FUNDS

RESEARCH