

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	9908	(0.71)	NIFTY IT	10613.55	(0.10)
Sensex	31798	(0.68)	NIFTY BANK	24374.60	(0.91)
DowJones	22049	(0.17)	NIFTY 500	8637.15	(1.03)
Nasdaq	6352	(0.28)	NIFTY FMCG	25102.80	(0.80)
Hangseng	27308	(1.62)	NIFTY INFRA	3336.00	(1.08)
Shanghai	3267	(0.27)	NIFTY AUTO	10925.65	(1.73)
Nikkei	7153	(0.07)	NIFTY ENERGY	13009.55	(0.25)
Strait Times	3328	0.29	NIFTY PHARMA	8766.25	(3.94)
Kospi	2350	(0.80)	<b>Advances / Declines</b>	<b>BSE</b>	<b>NSE</b>
Taiwan	10364	(1.02)	Advances	575	323
FTSE	7498	(0.59)	Declines	2003	1359
CAC	5146	(1.40)	Unchanged	120	62
DAX	12154	(1.12)	Total	2698	1744

Nifty Gainers		
Company	Price(Rs)	Chg(%)
HINDALCO	239.20	1.83
NTPC	173.60	1.43
ASIANPAINT	1155.55	0.71
INFY	970.70	0.71
ONGC	165.15	0.70

Nifty Losers		
Company	Price(Rs)	Chg(%)
AUROPHARMA	682.15	(6.08)
SUNPHARMA	472.50	(5.57)
ADANI PORTS	396.00	(4.53)
CIPLA	558.00	(3.56)
TATAMOTORS	416.05	(3.24)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
INDOCO	2.92	0.3	10
WHIRLPOOL	7.46	0.8	10
NRBBEARING	4.72	0.5	9
MOTILALOF	7.34	0.9	9
KUSHAL	6.51	0.8	8

Indian Forex	Closing	Chg	% Chg
USD/INR	63.749	0.011	0.02
GBP/INR	82.925	(0.222)	(0.27)
EUR/INR	74.861	(0.427)	(0.57)
JPY/INR	57.940	0.310	0.54

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	28551	35
Silver (Rs/1kg)	38010	595

Commodities	Price	% Chg.
Crude (US\$/BBL)	49.5	1.06
Brent (US\$/BBL)	52.7	1.43
Gold (US/oz)	1282.5	0.94
Silver (US\$/oz)	16.9	2.30
Copper (US\$/MT)	6465.0	1.59
Alum (US\$/MT)	2018.0	1.87
Zinc(US\$/MT)	2947.0	2.58

ADR	Cl. Values	% Chg.
ICICI Bank	9.30	(1.50)
HDFC Bank	97.40	(1.10)
Infosys	15.50	(0.10)
Tata Steel Ltd	18.30	2.40
Dr. Deddy's Labs	34.20	(4.00)
Wipro	6.10	0.50
Tata Motors	34.00	(1.30)

## Market Sensor

US market closed lower on Wednesday as U.S.-North Korean relations heated up. Dow Jones Industrial Average was down 0.17% or 36.64 points at 22048.70 Nasdaq Composite was down 0.28% or 18.13 points at 6352.33 Standard & Poor's 500 was down 0.04% or 0.90 points at 2474.02

Indian Equity market lost over half a percent in a volatile trading day on rising geopolitical risk after President Donald Trump warned the U.S. will retaliate against North Korea. All the sectors recorded sharp declines, Pharma and auto were the top losers on sectoral front. Nifty ended the previous day with a decline of 0.71% or 70.50 points at 9908.05. On Wednesday's trading session, FII sold net Rs.841.44 Cr in cash market and bought Rs.1954.00 Cr in derivative segment. Whereas, DII bought net Rs.553.17 Cr in cash segment.

## Global News

- ❖ China's factory price inflation held steady in July in a positive sign for industrial output and profits for the third quarter, even though a government-led drive to reduce debt is expected to cool earnings and economic growth by year-end. (Reuters)
- ❖ U.S. productivity grew more than expected in the second quarter as hours worked rose at their fastest pace in 1-1/2 years, leading to a modest increase in labor costs that could keep inflation muted in the near term. (Reuters)
- ❖ Wholesale inventories in the U.S. rose by slightly more than expected in the month of June by 0.7 percent after rising by an upwardly revised 0.6 percent in May. (Reuters)
- ❖ Core machine orders in Japan skidded a seasonally adjusted 1.9 percent on month in June, standing at 790.0 billion yen. (Reuters)
- ❖ The house price balance in the United Kingdom came in with a score of +1 in July, the Royal Institution of Chartered Surveyors said on Thursday. (Reuters)

## Economic News

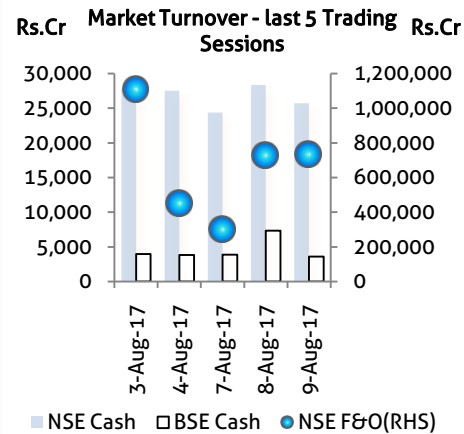
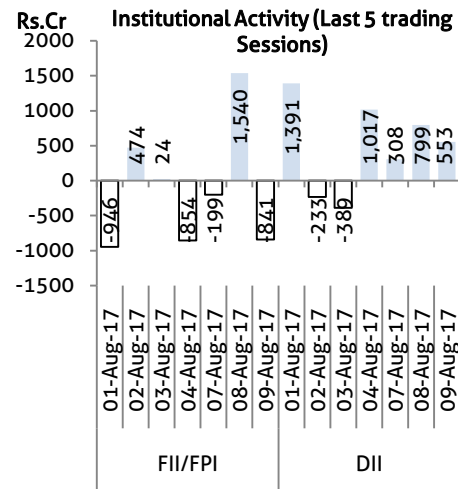
- ❖ Direct tax collections jumped 19 per cent in the first four months of the current financial year as demonetisation of higher denomination currency brought in the number of individuals in the tax net.
- ❖ The ministry of civil aviation is in the last stages of preparing the modalities of disinvestment of state-run helicopter operator Pawan Hans and will send its proposal for evaluation "within a week", a senior official said .
- ❖ Worried over multi-fold jump in gold imports from South Korea, the government is contemplating steps to check the surge in inbound shipments from the country, an official said .
- ❖ India's agricultural exports have declined to \$33.87 billion in 2016-17 from \$43.23 billion in 2013-14, Parliament was informed on Wednesday.
- ❖ India's retail inflation is expected to have picked up slightly in July after cooling in the previous three months, a Reuters poll showed, but likely remained well below the central bank's 4 per cent medium-term target.
- ❖ Commerce and industry minister Nirmala Sitharaman on Wednesday said anti-dumping duty is in force on 93 products imported from China
- ❖ The government has notified the dates for furnishing final tax returns for July and August under GST regime.
- ❖ Veteran industrialist Adi Godrej on Wednesday said the Goods and Services Tax (GST) will lead to considerable increase in the GDP in the next six months.
- ❖ The government has notified the timeline for furnishing final tax returns for July and August under the Goods and Services Tax (GST) regime.
- ❖ The government is working on new norms for power purchase by electricity distribution companies (discoms) that promise to revive demand for power purchase agreements (PPAs). The long-term PPAs have dried off due to weak industrial power demand and tepid offtake.

## Domestic News

- ❖ Tata Chemicals is aiming to clock Rs 10,000-crore business in its soda ash segment and Rs 5,000 crore in the pulses, spices and food category in the next five years.
- ❖ Britannia Inds plans to rope in a partner to strengthen its dairy business and discontinue a few brands in this segment as part of a strategy to focus on higher margin products.
- ❖ NHPC signed Power Purchase Agreement with BSES Yamuna Power for a period of 35 years from the date of commercial operation of the seven power stations.
- ❖ IDBI Bank announced that Government of India (GoI) has infused share application money of Rs. 1861 crore towards fresh Preferential Issue.
- ❖ Cummins is setting up the group's biggest technology centre in Pune at a cost of Rs 1500 crore for developing state of the art electric and hybrid vehicle solutions including affordable emission technologies.
- ❖ NTPC is planning its first reduction in capital spending in at least six years amid the country's slowing demand growth and surplus capacity. NTPC plans to spend 230 billion rupees as capital expenditure this year, which is about 18% lower than previous year.

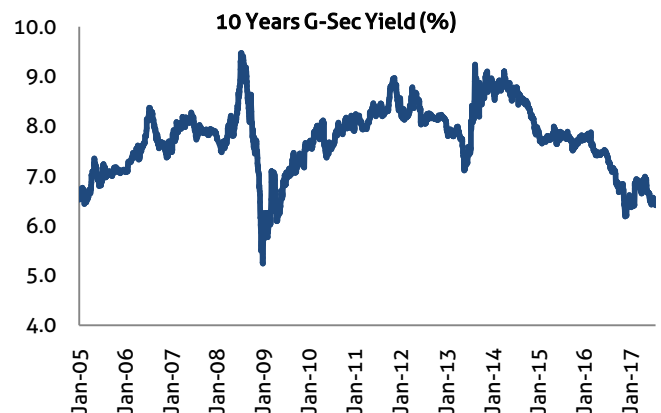
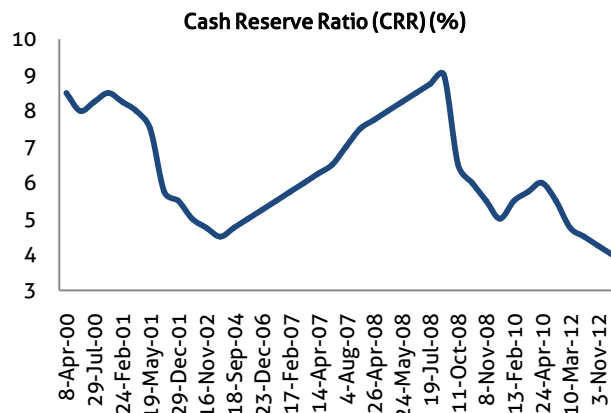
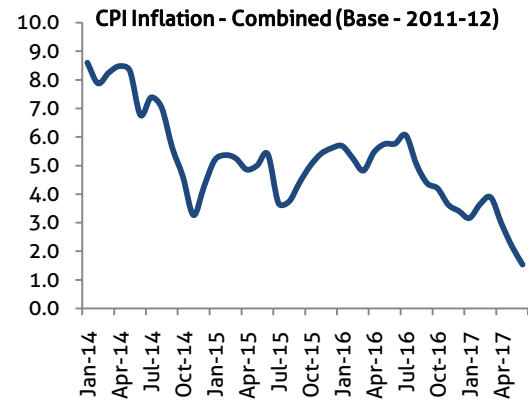
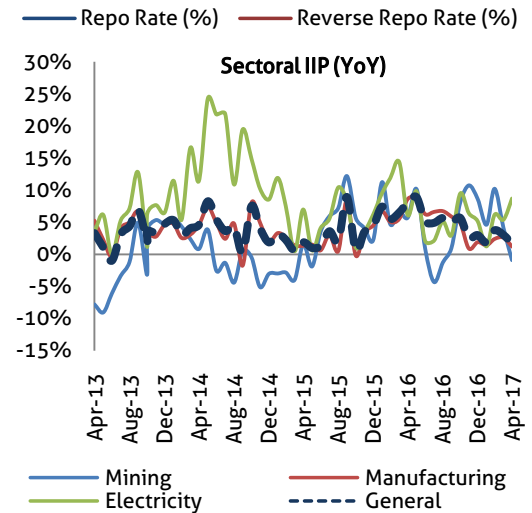
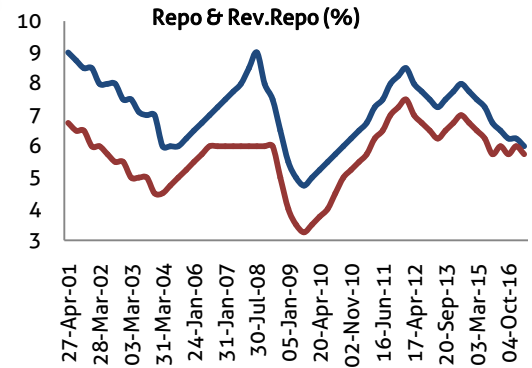
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1256	0.0002	0.02
GBP-USD	1.3004	(0.0002)	(0.02)
USD-JPY	110.04	(0.0400)	(0.04)

Bond Markets	Closing	Chg
10-yr bond	6.78	-2.40 bps
Interbank call	5.91	0.64 bps



## Domestic News (Cont...)

- ❖ MCX has received capital markets regulator Sebi approval to launch options on gold.
- ❖ Ashok Leyland is scouting for a battery maker to power its expansion into the electric vehicles space, encouraged by the government push to less-polluting mass mobility systems.
- ❖ Lupin is scouting for speciality assets in women's health and neurology businesses in regulated markets such as the US.
- ❖ Bharat Sanchar Nigam Ltd (BSNL) is in talks with private telecom operators Bharti Airtel and Reliance Jio Infocomm for sharing its dark, or unused, optic fibre as part of its efforts to double its revenue from network sharing to about Rs 3,000 crore in 2017-18.
- ❖ INEOS Styrolution board approves expansion of ABS compounding capacity from 66KTA to 100KTA for an investment of Rs 130 crore.
- ❖ Aurobindo Pharma increased its stake in Tergene Biotech from 60 percent to 80 percent for an amount of Rs 5.65 crore.
- ❖ Lupin has received approval from the US health regulator to market Pitavastatin tablets used for lowering cholesterol.
- ❖ The inter-ministerial group on telecom issues is likely to meet on August 11 to discuss measures to ease the financial stress in the sector, officials said.
- ❖ Bank of India may have just turned around and is planning to raise Rs 8,000 crore in capital to be ready to buy a bank as and when the government sets in motion the consolidation process.
- ❖ Daiichi Sankyo's legal tussle to recover Rs 3,500 crore from former Ranbaxy promoters Malvinder and Shivinder Singh has taken a sharp turn, with the Japanese drug maker moving the Supreme Court to block sale of promoter shares in Fortis Healthcare.
- ❖ German consumer business giant Henkel AG & Co. will acquire up to 26 percent stake in Jyothi Laboratories Ltd. at the prevailing market price, the maker of Ujala fabric care products said in its annual report for 2016-17.
- ❖ Dabur India's step-down subsidiary Dabur Tunisie is being wound down and the liquidation is in process.
- ❖ Union Bank of India to raise Rs 2,000 crore through various instruments, including rights issue and private placement.



## Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
09-Aug-17	Housing Development and I	GENUINE STOCK BROKERS PVT LTD	SELL	10486824	55.3
09-Aug-17	Jaiprakash Associates Lim	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	SELL	12988327	24.9
09-Aug-17	Sintex Industries Ltd.	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	SELL	4551152	29.5
09-Aug-17	MEP Infra. Developers Ltd	TEJ JITENDRABHAI SHAH	BUY	1096874	121.0
09-Aug-17	Ganesh Housing Corp Ltd	GAUTAM PRAKASH	BUY	447500	139.2

## Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
09-Aug-17	HDIL	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	S	3,267,324	56.7
09-Aug-17	CENTRUM	ICICI PRUDENTIAL MUTUAL FUND	B	2,100,000	51.0
09-Aug-17	ADCC	AMIT KEDARNATH SOMANI	S	49,500	160.0
09-Aug-17	SVPHOUSING	SIRIUS ADVISORS PRIVATE LIMITED	B	130,000	45.0
09-Aug-17	COMCL	ROSHAN KUMAR ARUN MANDAL	S	236,462	23.0

## Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
538734	ADCC	10-Aug-17	Bonus issue 1:10	11-Aug-17
535902	BSLAPIXDG	10-Aug-17	Temporary Suspension	11-Aug-17
535903	BSLAPIXDND	10-Aug-17	Temporary Suspension	11-Aug-17
535904	BSLAPIXDQD	10-Aug-17	Temporary Suspension	11-Aug-17
535905	BSLAPIXRG	10-Aug-17	Temporary Suspension	11-Aug-17
535906	BSLAPIXRND	10-Aug-17	Temporary Suspension	11-Aug-17
535907	BSLAPIXRQ	10-Aug-17	Temporary Suspension	11-Aug-17
523369	DCMSRMIND	10-Aug-17	Final Dividend - Rs. - 6.5000	-
532610	DWARKESH	10-Aug-17	Dividend - Rs. - 10.0000	-
532610	DWARKESH	10-Aug-17	Stock Split From Rs.10/- to Rs.1/-	-
524818	DYNAMIND	10-Aug-17	Dividend - Rs. - 1.0000	-
532129	HEXAWARE	10-Aug-17	Interim Dividend - Rs. - 1.0000	11-Aug-17
524342	INDOBORAX	10-Aug-17	Dividend - Rs. - 1.5000	-
520066	JAYBARMARU	10-Aug-17	Dividend - Rs. - 2.5000	-
532605	JBMA	10-Aug-17	Dividend - Rs. - 2.0000	-
500227	JINDALPOLY	10-Aug-17	Final Dividend - Rs. - 1.0000	-
532400	KPIT	10-Aug-17	Dividend - Rs. - 2.2000	-
539207	MANPASAND	10-Aug-17	Dividend - Rs. - 1.0000	11-Aug-17
538962	MINDACORP	10-Aug-17	Final Dividend - Rs. - 0.3000	-
532621	MORARJEE	10-Aug-17	Dividend - Rs. - 1.4000	-
500109	MRPL	10-Aug-17	Dividend - Rs. - 6.0000	-
520043	MUNJALSHOW	10-Aug-17	Dividend - Rs. - 4.0000	-

## Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
07-Aug-17	JPY	Coincident Indicator (MoM) (Jun)			-1.60%
07-Aug-17	JPY	Leading Index (MoM) (Jun)			0.50%
07-Aug-17	GBP	Halifax House Price Index (YoY) (Jul)		2.00%	2.60%
07-Aug-17	EUR	Sentix Investor Confidence (Aug)		27.8	28.3
08-Aug-17	USD	Consumer Credit (Jun)		15.54B	18.41B
08-Aug-17	GBP	BRC Retail Sales Monitor (YoY) (Jul)			1.20%
08-Aug-17	JPY	Current Account n.s.a. (Jun)		0.814T	1.654T
08-Aug-17	CNY	Trade Balance (USD) (Jul)		46.08B	42.77B
08-Aug-17	USD	NFIB Small Business Optimism (Jul)			103.6
08-Aug-17	USD	JOLTs Job Openings (Jun)			5.666M
09-Aug-17	CNY	CPI (YoY) (Jul)		1.50%	1.50%
09-Aug-17	CNY	PPI (YoY) (Jul)		5.50%	5.50%
09-Aug-17	JPY	Machine Tool Orders (YoY)			31.10%
09-Aug-17	USD	MBA 30-Year Mortgage Rate			4.17%
09-Aug-17	USD	Nonfarm Productivity (QoQ) (Q2)		0.70%	0.00%
09-Aug-17	USD	Wholesale Inventories (MoM) (Jun)		0.60%	0.60%
10-Aug-17	GBP	RICS House Price Balance (Jul)		8%	7%
10-Aug-17	JPY	Core Machinery Orders (YoY) (Jun)		-1.00%	0.60%
10-Aug-17	JPY	PPI (YoY) (Jul)		2.40%	2.10%
10-Aug-17	JPY	Tertiary Industry Activity Index (MoM)			-0.10%
10-Aug-17	GBP	Construction Output (MoM) (Jun)		1.50%	-1.20%
10-Aug-17	GBP	Industrial Production (YoY) (Jun)		-0.20%	-0.20%
10-Aug-17	GBP	Trade Balance (Jun)		-11.00B	-11.86B
10-Aug-17	USD	Continuing Jobless Claims		1,960K	1,968K
10-Aug-17	USD	Initial Jobless Claims		240K	240K
10-Aug-17	USD	PPI (MoM) (Jul)		0.10%	0.10%
10-Aug-17	USD	Bloomberg Consumer Confidence			49.6
11-Aug-17	USD	CPI (MoM) (Jul)		0.20%	0.00%
11-Aug-17	USD	Real Earnings (MoM) (Jul)			0.50%

## Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
11-Aug-17	INR	Industrial Production (YoY) (Jun)			1.70%
11-Aug-17	INR	Manufacturing Output (MoM) (Jun)			1.20%

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