

Equity	Latest	% Chg	NSE Sect. Indices	Latest	% Chg
Nifty	11435	0.70	NIFTY IT	15009.25	0.87
Sensex	37852	0.55	NIFTY BANK	28021.70	0.82
DowJones	25162	(0.54)	NIFTY 500	9726.15	0.72
Nasdaq	7774	(1.23)	NIFTY FMCG	31725.25	0.78
Hangseng	27155	(0.62)	NIFTY INFRA	3093.60	(0.64)
Shanghai	2707	(0.59)	NIFTY AUTO	10803.15	0.43
Nikkei	22151	(0.24)	NIFTY ENERGY	15309.85	1.11
Strait Times	3223	(0.34)	NIFTY PHARMA	9481.15	3.21
Kospi	2237	(0.98)	Advances / Declines	BSE	NSE
Taiwan	10717	0.02	Advances	1302	887
FTSE	12163	(1.49)	Declines	1390	897
CAC	7498	(1.82)	Unchanged	141	114
DAX	48557	(1.58)	Total	2833	1898

Nifty Gainers		
Company	Price(Rs)	Chg(%)
SUNPHARMA	605.60	7.39
YESBANK	383.50	3.45
LUPIN	838.75	3.30
CIPLA	645.95	2.81
BAJFINANCE	2830.20	2.53

Nifty Losers		
Company	Price(Rs)	Chg(%)
UPL	608.90	(2.64)
ADANI PORTS	372.35	(1.27)
HEROMOTOCO	3266.40	(1.26)
BHARTIARTL	366.50	(0.99)
HINDPETRO	270.45	(0.97)

Vol. Shockers	Last Day (Lakh)	2 Wk Avg. (Lakh)	Vol. Ch. (Times)
RELTID	320.83	32.1	10
OFSS	0.63	0.1	8
LINCOPH	13.19	1.6	8
TIRUMALCHM	3.55	0.5	8
FILATEX	12.84	2.0	7

Indian Forex	Closing	Chg	% Chg
USD/INR	69.770	0.301	0.43
GBP/INR	89.231	0.604	0.68
EUR/INR	79.700	0.512	0.65
JPY/INR	62.900	(0.070)	(0.11)

Precious Metal	Closing	Chg (Rs.)
Gold (Rs/10gm)	29523	(151)
Silver (Rs/1kg)	37550	(299)

Commodities	Price	% Chg.
Crude (US\$/BBL)	65.1	(3.64)
Brent (US\$/BBL)	71.1	(2.51)
Gold (US/oz)	1179.7	(1.90)
Silver (US\$/oz)	14.5	(3.85)
Copper (US\$/MT)	5843.0	(4.58)
Alum (US\$/MT)	1994.5	(4.21)
Zinc (US\$/MT)	2325.0	(6.68)

ADR	Cl. Values	% Chg.
ICICI Bank	9.50	(1.70)
HDFC Bank	101.90	(1.60)
Infosys	20.80	0.10
Vedanta Ltd	12.60	(4.20)
Dr. Deddy's Labs	32.20	(0.20)
Wipro	5.10	1.00
Tata Motors	17.90	(2.50)

Market Sensor

U.S. market fell on Wednesday as declines in tech shares and Macy's dampened investor sentiment. Equities also followed overseas stocks lower. Dow Jones Industrial Average was down 0.54% or 137.51 points at 25162.41. Nasdaq Composite was down 1.23% or 96.78 points at 7774.12. Standard & Poor's 500 was down 0.76% or 21.59 points at 2818.37.

Indian Equity market broke the two-day losing streak after retail inflation slowed to a nine month low, providing comfort to the government and Reserve Bank of India. Retail inflation dropped to a nine-month low of 4.17% in July from 4.92% a month ago. On sectoral front all the sectoral indices closed in green. Nifty Pharma, Realty, Private Banks & Media gained the most and outperformed the Nifty. Fin service, PSU Bank, Auto & Metal indices underperformed the Nifty. Nifty ended the previous day with a gain of 0.70% or 79.35 points at 11435.10. On Tuesday's trading session, FII's sold Rs. 378.84 Cr in cash market and bought Rs.532.48 Cr in derivative segment. Whereas, DII bought net Rs.391.47 Cr in cash segment.

Global News

❖ U.S. senators agreed on Wednesday to debate and vote in the next few days on more than \$850 billion in spending on defence, labour and healthcare programs, as the Trump administration announced its objections to some parts of the bill. (Reuters)

❖ Japan's export growth slowed more than expected in July as shipments to the United States fell for a second straight month, with the automotive sector down sharply and global trade disputes casting doubts over foreign demand. (Reuters)

❖ President Donald Trump said his tariffs on foreign steel are saving the U.S. industry and he predicted that in the future American steelmakers will mostly face domestic competition, the Wall Street Journal reported. (Reuters)

❖ U.S. retail sales rose more than expected in July as households boosted purchases of motor vehicles and clothing, suggesting the economy remained strong early in the third quarter. (Reuters)

❖ Britain's inflation rate rose in July for the first time in 2018, keeping the squeeze on many households' budgets, but there were signs that the pick-up was a blip and inflation might fall faster than the Bank of England thinks. (Reuters)

Economic News

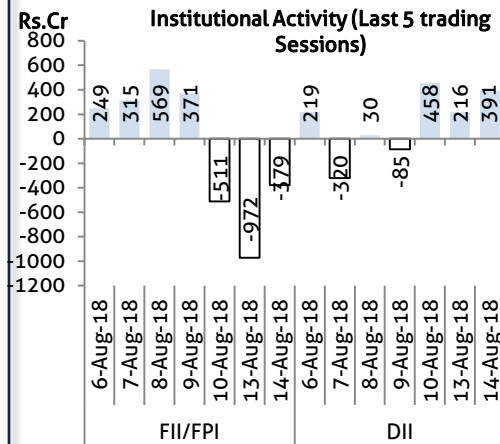
- ❖ Allaying fears of industry and investors over global worries, Union Minister Arun Jaitley on Wednesday said the Centre was monitoring the global situation closely, and stressed that India's macro-economic fundamentals were strong. (BS)
- ❖ The government's ambitious plan to roll out solar power-run irrigation pumps for farmers is facing funding challenges. (BS)
- ❖ The indirect tax base in the country has expanded by 65 per cent to 11.6 million in a year since the roll-out of GST on July 1, 2017, said Prime Minister Narendra Modi during his Independence Day speech. (BS)
- ❖ If the steep decline in the household savings rate which has fallen to 16.3 per cent from 23.6 per cent between fiscals 2012 and 2017 continues, it may pose a serious challenge to overall growth and the macroeconomic stability, warns a report. (BS)
- ❖ The Telecom Commission, apex decision-making body at the telecom department, is likely to meet on August 31 to discuss Trai's recommendation on spectrum allocation, according to official sources.
- ❖ A draft e-commerce policy wants online retailers such as Amazon.com, search engines like Google and social media platforms to locally store data generated by users in India, with the government having access to such data for national security and public policy objective. (BS)
- ❖ India's trade deficit in July widened to the most in more than five years, worsening the outlook for the rupee that hit a record low. (BS)
- ❖ Prime Minister Narendra Modi on Wednesday announced that his government will launch an ambitious healthcare scheme on September 25 this year which will benefit 500 million citizens of the country. (BS)
- ❖ Tobacco products will continue to carry pictorial warning covering 85 per cent of the packaging space, the Supreme Court said. (BS)
- ❖ As the rupee slid to its all-time low, the government tried to assuage sentiments on Tuesday, saying that the fall in exchange rate was because of external factors and was not a cause of concern. (BS)

Domestic News

- ❖ The RBI has communicated to Kotak Mahindra Bank that its PNCPS issuance does not meet the promoter holding dilution requirement. The company continues to believe that it has met the requirement and will engage with the RBI in this matter.
- ❖ Fortis Healthcare's shareholders have given nod to the acquisition of the domestic healthcare chain by Malaysia's IHH Healthcare, will invest Rs 40 billion in the cash-strapped hospital chain via preferential allotment at Rs 170 a share.
- ❖ Allcargo Logistics is in initial round of talks to acquire a controlling stake in express logistics company Gati, according to an ET report.
- ❖ Siyaram Silk has commenced commercial production of dyed yarn (Indigo) at its unit at Amravati having an installed annual production capacity of 2,500 MT.
- ❖ Bhageria Industries has received approval from the Maharashtra Pollution Control Board to manufacture Sulphuric Acid and Derivatives at its plant in Tarapur, Maharashtra.
- ❖ Svendgaard Labs approved expansion manufacturing facilities at Kheri.

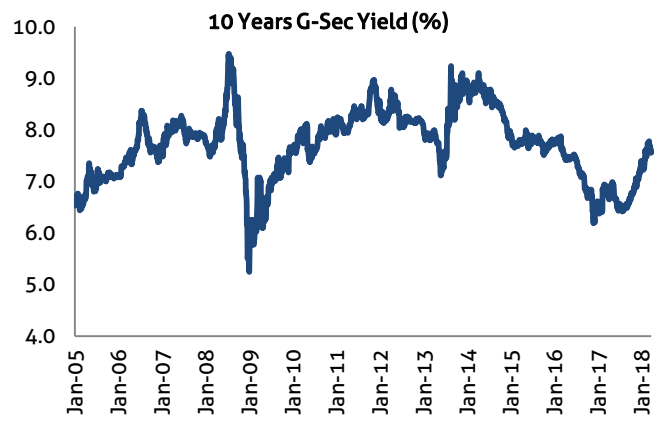
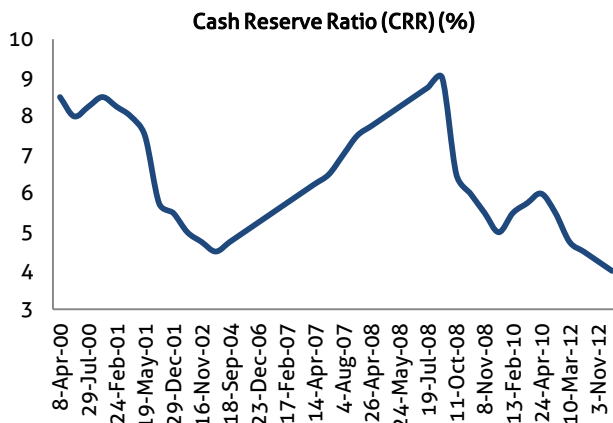
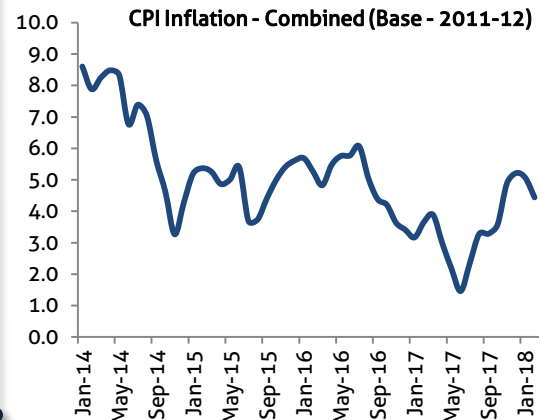
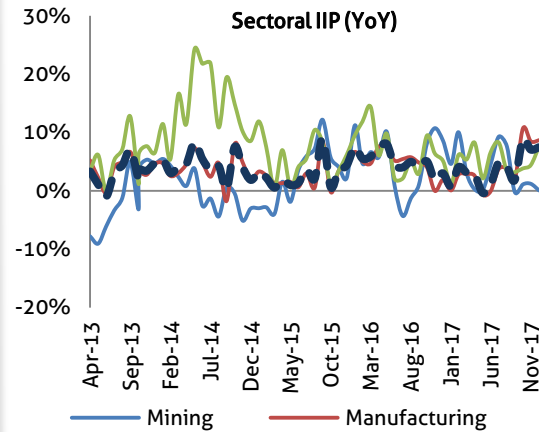
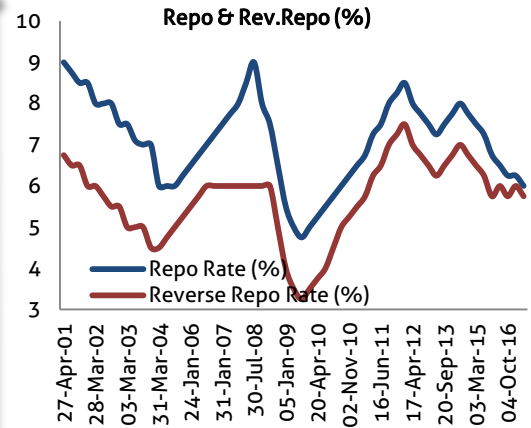
Global Forex	Closing	Chg	% Chg
EUR-USD	1.1374	0.0028	0.25
GBP-USD	110.81	0.0600	0.05
USD-JPY	1.2714	0.0017	0.13

Bond Markets	Closing	Chg
10-yr bond	7.94	2.80 bps
Interbank call	6.37	3.50 bps



Domestic News (Cont...)

- ❖ Cadila Healthcare plans to acquire 51 per cent stake in Windlass Healthcare for Rs 155.55 crore.
- ❖ Monsanto India clarified that news of a lawsuit by cancer patient pertains to its US arm does not have any material impact on Monsanto India.
- ❖ Mrs Bectors Food Specialities files Rs800cr IPO papers with SEBI.
- ❖ Shilpa Medicare to set up arm for North American operations.
- ❖ NCLT approved demerger of Cox & Kings forex division.
- ❖ US private equity firm Blackstone Group LP is in talks to acquire a stake in the frequent-flier loyalty programme of Jet Airways in between Rs 30 billion and Rs 40 billion, Bloomberg reported.
- ❖ UPL has subscribed to 5.01 per cent equity shares of Weather Risk Management Services Private Limited (WRMS).
- ❖ Energy solutions provider Exicom has won an NTPC tender for development of charging infrastructure for electric vehicles (EV) at Jabalpur in Madhya Pradesh.
- ❖ Reliance Industries has declared force majeure on gasoline exports from its Jamnagar site, potentially boosting margins for other suppliers of the oil product.
- ❖ Reliance Industries and its partner BP plc of UK have spent over Rs 70 billion in prolonging output from the flagging D1 and D3 gas fields in the Bay of Bengal as they prepare new fields that will start production in mid-2020, sources in the consortium said.
- ❖ JSW Steel has made the highest bid for Bhushan Power & Steel in the second round of bidding for the asset in going through the insolvency process.
- ❖ UCO Bank has entered into an inter-creditor agreement for resolution of stressed assets.
- ❖ CCI has approved of Adani Wilmar's Rs 60-billion bid to acquire insolvent firm Ruchi Soya.
- ❖ Adani Green Energy said that Solar Energy Corporation of India (SECI) has annulled the tender won for setting up 300 MWac solar generation projects by its arm Mahoba Solar (UP) Private Ltd.
- ❖ PVR Ltd is eyeing Rs 5 billion revenue from South India-based SPI Cinemas, which the former is in the process of acquiring, by financial year 2019-20.



Bulk Deal - NSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
14-Aug-18	Reliance Comm. Ltd.	SHARE INDIA SECURITIES LIMITED	SELL	25601967	21.0
14-Aug-18	S H Kelkar and Co. Ltd.	KEVA CONSTRUCTIONS PVT LTD	BUY	1800000	195.5
14-Aug-18	Reliance Comm. Ltd.	SHAASTRA SECURITIES TRADING PRIVATE LIMITED	SELL	14627059	21.1
14-Aug-18	Jet Airways (India) Ltd.	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	SELL	813331	281.5
14-Aug-18	Lincoln Pharma Ltd	PARU SECURITIES PVT LTD	SELL	577060	249.3

Bulk Deal - BSE

Date	Security Name	Client Name	Buy/Sell	Traded Qty.	Price
14-Aug-18	RELTD	NARENDRA MADHUSUDAN MURKUMBI .	B	32,083,110	17.9
14-Aug-18	LINCOPH	PARO SECURITIES P LTD	S	359,888	248.5
14-Aug-18	KAPASHI	SANJAY KOTHARI	S	43,000	94.2
14-Aug-18	ANG	GUINNESS SECURITIES LIMITED	B	35,200	71.0
14-Aug-18	GOLDTECH	TARUN GUPTA HUF	B	100,000	22.8

Corporate Actions

Scrip Code	Scrip Name	Ex-Date	Purpose	Record Date
511724	BALFC	16-Aug-18	Final Dividend - Rs. - 0.5000	-
522292	CHANDNI	16-Aug-18	Spin Off	20-Aug-18
503681	ELCIDIN	16-Aug-18	Final Dividend - Rs. - 15.0000	-
500199	IGPL	16-Aug-18	Dividend - Rs. - 4.0000	-
500233	KAJARIACER	16-Aug-18	Dividend - Rs. - 3.0000	-
539400	MALLCOM	16-Aug-18	Dividend - Rs. - 2.0000	-
524129	VINYLINDIA	16-Aug-18	Dividend - Rs. - 2.4000	-
505163	ZFSTEERING	16-Aug-18	Dividend - Rs. - 8.0000	-
530999	BALAMINES	20-Aug-18	Dividend - Rs. - 2.6000	-
502355	BALKRISIND	20-Aug-18	Interim Dividend - Rs. - 2.0000	21-Aug-18
500049	BEL	20-Aug-18	Final Dividend - Rs. - 0.4000	-
539884	DARSHANORNA	20-Aug-18	Final Dividend - Rs. - 0.2500	-
532927	ECLERX	20-Aug-18	Dividend - Rs. - 1.0000	-
536507	FLFL	20-Aug-18	Dividend - Rs. - 1.2000	22-Aug-18
538979	GRNLAMIND	20-Aug-18	Final Dividend - Rs. - 2.5000	-
519552	HERITGFOOD	20-Aug-18	Dividend - Rs. - 2.0000	-
517077	INDAGIV	20-Aug-18	Dividend - Rs. - 0.5000	-
530965	IOC	20-Aug-18	Final Dividend - Rs. - 2.0000	-
511208	IVC	20-Aug-18	Dividend - Rs. - 0.6000	-
532400	KPIT	20-Aug-18	Final Dividend - Rs. - 2.4000	22-Aug-18
532889	KPRMILL	20-Aug-18	Dividend - Rs. - 0.5000	-
533519	L&TFH	20-Aug-18	Final Dividend - Rs. - 2.0000	-

Global Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
14-Aug-18	CNY	Industrial Production (YoY) (Jul)		6.30%	6.00%
14-Aug-18	CNY	Retail Sales (YoY) (Jul)		9.00%	9.00%
14-Aug-18	JPY	Industrial Production (MoM) (Jun)		-2.10%	-2.10%
14-Aug-18	EUR	Retail PMI			51.8
14-Aug-18	GBP	Unemployment Rate (Jun)		4.20%	4.20%
14-Aug-18	EUR	GDP (YoY) (Q2)		2.10%	2.10%
14-Aug-18	EUR	Industrial Production (YoY) (Jun)		2.70%	2.40%
14-Aug-18	USD	Export Price Index (MoM) (Jul)		0.30%	0.30%
14-Aug-18	USD	Import Price Index (MoM) (Jul)		0.10%	-0.40%
15-Aug-18	GBP	CPI (YoY) (Jul)		2.50%	2.40%
15-Aug-18	GBP	PPI Input (YoY) (Jul)		10.50%	10.20%
15-Aug-18	GBP	PPI Output (YoY) (Jul)		3.10%	3.10%
15-Aug-18	GBP	RPI (YoY) (Jul)		3.40%	3.40%
15-Aug-18	USD	Nonfarm Productivity (QoQ) (Q2)		2.40%	0.40%
15-Aug-18	USD	NY Empire State Manufacturing Index (Aug)		21	22.6
15-Aug-18	USD	Retail Sales (MoM) (Jul)		0.30%	0.50%
15-Aug-18	USD	Industrial Production (YoY)			3.80%
15-Aug-18	USD	Business Inventories (MoM) (Jun)		0.10%	0.40%
15-Aug-18	USD	NAHB Housing Market Index (Aug)		68	68
16-Aug-18	USD	TIC Net Long-Term Transactions (Jun)			45.6B
16-Aug-18	JPY	Trade Balance (Jul)		-50B	721B
16-Aug-18	GBP	Retail Sales (YoY) (Jul)		3.00%	2.90%
16-Aug-18	EUR	Trade Balance (Jun)			16.5B
16-Aug-18	USD	Building Permits (MoM) (Jul)		1.40%	-2.20%
16-Aug-18	USD	Housing Starts (MoM) (Jul)		7.40%	-12.30%
16-Aug-18	USD	Initial Jobless Claims			
16-Aug-18	USD	Philadelphia Fed Manufacturing Index (Aug)		22	25.7
17-Aug-18	EUR	Current Account n.s.a. (Jun)			4.6B
17-Aug-18	EUR	CPI (YoY) (Jul)		2.10%	2.10%
17-Aug-18	USD	Michigan Consumer Sentiment (Aug)		98	97.9

Indian Economic Calendar

Date	Curr.	Event	Actual	Forecast	Previous
13-Aug-18	INR	Industrial Production (YoY) (Jun)		5.20%	3.20%
13-Aug-18	INR	CPI (YoY) (Jul)		4.51%	5.00%
14-Aug-18	INR	WPI Inflation (YoY) (Jul)		5.24%	5.77%
14-Aug-18	INR	Trade Balance			-16.60B

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