

| Equity | Latest | % Chg | NSE Sect. Indices | Latest | % Chg |
|--------------|--------|--------|----------------------------|------------|------------|
| Nifty | 11385 | (0.44) | NIFTY IT | 15044.35 | 0.23 |
| Sensex | 37664 | (0.50) | NIFTY BANK | 27826.55 | (0.70) |
| DowJones | 25559 | 1.58 | NIFTY 500 | 9685.65 | (0.42) |
| Nasdaq | 7807 | 0.42 | NIFTY FMCG | 31731.25 | 0.02 |
| Hangseng | 27217 | 0.43 | NIFTY INFRA | 3076.65 | (0.55) |
| Shanghai | 2705 | (0.02) | NIFTY AUTO | 10830.95 | 0.26 |
| Nikkei | 22290 | 0.44 | NIFTY ENERGY | 15238.60 | (0.47) |
| Strait Times | 3231 | 0.59 | NIFTY PHARMA | 9595.35 | 1.20 |
| Kospi | 2247 | 0.27 | Advances / Declines | BSE | NSE |
| Taiwan | 10733 | 0.46 | Advances | 1170 | 703 |
| FTSE | 12237 | 0.78 | Declines | 1556 | 1098 |
| CAC | 7556 | 0.83 | Unchanged | 135 | 85 |
| DAX | 48059 | 0.61 | Total | 2861 | 1886 |

| Nifty Gainers | | |
|---------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| GAIL | 393.50 | 3.61 |
| DRREDDY | 2357.60 | 3.47 |
| SUNPHARMA | 621.00 | 3.19 |
| LUPIN | 849.20 | 1.49 |
| INFY | 1429.00 | 1.47 |

| Nifty Losers | | |
|--------------|-----------|--------|
| Company | Price(Rs) | Chg(%) |
| KOTAKBANK | 1245.00 | (3.71) |
| VEDL | 209.00 | (2.84) |
| ZEEL | 500.65 | (2.59) |
| HDFC | 1892.20 | (2.54) |
| IBULHSGFIN | 1258.60 | (2.51) |

| Vol. Shockers | Last Day (Lakh) | 2 Wk Avg. (Lakh) | Vol. Ch. (Times) |
|---------------|-----------------|------------------|------------------|
| ISEC | 19.69 | 2.3 | 9 |
| HOCL | 20.20 | 2.9 | 7 |
| PRSMJOHNSN | 17.56 | 2.9 | 6 |
| EQUITAS | 15.80 | 2.8 | 6 |
| ALKEM | 0.52 | 0.1 | 6 |

| Indian Forex | Closing | Chg | % Chg |
|--------------|---------|-------|-------|
| USD/INR | 70.229 | 0.459 | 0.66 |
| GBP/INR | 89.367 | 0.136 | 0.15 |
| EUR/INR | 79.972 | 0.272 | 0.34 |
| JPY/INR | 63.350 | 0.450 | 0.72 |

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

| Commodities | Price | % Chg. |
|------------------|--------|--------|
| Crude (US\$/BBL) | 65.5 | 0.60 |
| Brent (US\$/BBL) | 71.4 | 0.42 |
| Gold (US/oz) | 1183.7 | 0.34 |
| Silver (US\$/oz) | 14.6 | 1.17 |
| Copper (US\$/MT) | 5860.0 | 0.29 |
| Alum (US\$/MT) | 1998.0 | 0.18 |
| Zinc (US\$/MT) | 2338.0 | 0.56 |

| ADR | Cl. Values | % Chg. |
|------------------|------------|--------|
| ICICI Bank | 9.50 | (0.50) |
| HDFC Bank | 100.00 | (0.80) |
| Infosys | 20.90 | (0.10) |
| Vedanta Ltd | 12.20 | (3.00) |
| Dr. Deddy's Labs | 32.50 | (1.00) |
| Wipro | 5.10 | (1.20) |
| Tata Motors | 17.40 | (1.40) |

Market Sensor

U.S. market closed higher on Thursday on renewed hope that a resolution to a trade dispute with China could be on the horizon. Investors also cheered strong quarterly results from Walmart and Cisco Systems. Dow Jones Industrial Average was up 1.58% or 396.32 points at 25558.73. Nasdaq Composite was up 0.42% or 32.41 points at 7806.52 Standard & Poor's 500 was up 0.79% or 22.32 points at 2840.69

Indian Equity market opened Thursday's session on a weak note and witnessed considerable volatility throughout the day, led by on-going global trade tensions and depreciating Turkish lira & rupee vs USD. On sectoral front, Nifty Auto, FMCG, IT and Pharma outperformed the broader index while on contrary Nifty Bank, Media and Metals underperformed the broader index. Nifty ended the previous day with a decline of 0.44% or 50.05 points at 11385.05. On Thursday's trading session, FII sold Rs. 825.08 Cr in cash market and bought Rs.1907.39 Cr in derivative segment. Whereas, DII bought net Rs.133.78 Cr in cash segment.

Global News

❖ Leaders from both parties on a powerful Senate committee vowed on Thursday to push back if President Donald Trump moves ahead with plans to bypass Congress and roll back billions of dollars from the U.S. foreign aid budget, including funds for programs in Syria and the West Bank and Gaza. (Reuters)

❖ Singapore's non-oil domestic exports (NODX) rose more than expected in July from a year earlier thanks to a surge in pharmaceutical shipments, official data showed on Friday. (Reuters)

❖ China's Premier Li Keqiang said the country will step up reforms and roll out new incentives to remove obstacles to private investment and business, the official Xinhua news agency reported. (Reuters)

❖ Business confidence among Japanese manufacturers was at its highest in seven months in August thanks to a firm global economy, a Reuters poll showed on Friday, but the service sector's mood hit its lowest since 2016, casting doubt on the robustness of domestic demand. (Reuters)

❖ South Korea added a mere 5,000 new jobs in July, slowing sharply from 106,000 a month earlier, official data showed on Friday, the smallest increase since January 2010 in the depths of the global financial crisis. (Reuters)

Economic News

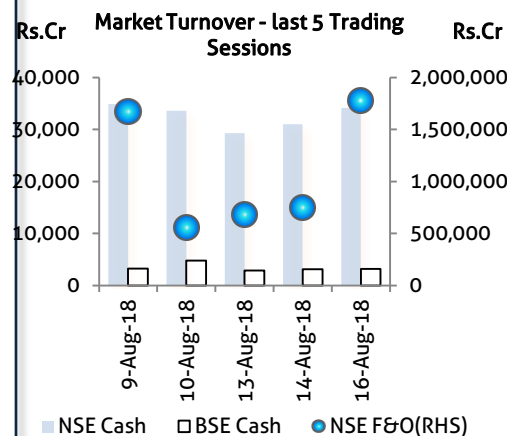
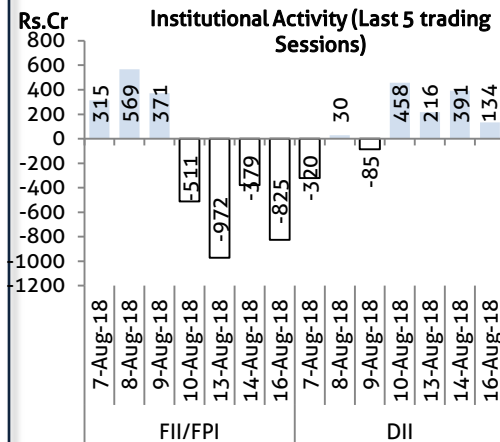
- ❖ India's economy is expected to grow at a healthy 7.5 per cent in the first quarter (Q1) of 2018-19 (FY19), lower than a seven-quarter high of 7.7 per cent in the fourth quarter (Q4) of FY18, economists have said. (BS)
- ❖ With the government focusing on road building, a key benchmark of economic activity, the money borrowed by the National Highways Authority of India (NHAI) has jumped a little over 18 times to Rs 620 billion since 2014, the year the current government came to power. The NHAI's borrowing was Rs 33.4 billion in 2014-15. (BS)
- ❖ India is being hit by a wave of steel from producers in Japan and South Korea, a government document showed, as mills there redirect supply after US President Donald Trump slapped an import duty on the alloy earlier this year. (BS)
- ❖ The government has asked the Reserve Bank of India (RBI) to consider diluting the Prompt Corrective Action (PCA) framework, to ensure that regulatory sanctions against public sector banks are lifted swiftly. (BS)
- ❖ Risk of inflationary pressures, triggered by rising crude oil prices, drove five-member of the monetary policy committee (MPC) in its August review to favour a hike in policy rate for the second time in a row. (BS)
- ❖ India's crude oil import bill is likely to jump by about \$26 billion in 2018-19 as rupee dropping to a record low has made buying of oil from overseas costlier, government officials said. (BS)
- ❖ India has exported tobacco worth Rs 14.47 bn in the first quarter of the current fiscal, an increase of 7 per cent since last year, mainly to Europe and South East Asia, according to the Tobacco Board. (BS)
- ❖ Indian rupee breaching the 70 mark against US dollar has brought cheers to seafood exporters. (BS)
- ❖ The launch of the much-delayed India Post Payments Bank (IPPB) promises to be a grand affair. Prime Minister Narendra Modi will do the honours in Delhi's Talkatora stadium along with Communications Minister Manoj Sinha on August 21. (BS)

Domestic News

- ❖ Consumer durables makers may go for price hike before festive season sales to partially pass on the higher import bills due to fall in rupee.
- ❖ Worldwide revenues for Big Data and Business Analytics (BDA) solutions will reach \$260 billion in 2022 with a compound annual growth rate (CAGR) of 11.9 per cent over the 2017-2022 period, according to a new forecast from International Data Corporation (IDC).
- ❖ JSW Steel has submitted a resolution plan of Rs 197 billion (Rs 19,700 crore) to the Committee of Creditors of debt-laden Bhushan Power and Steel, Tata Steel and Liberty House have also submitted bids to acquire.
- ❖ NBCC gets Rs 250 crore order from SAIL to build super speciality hospital at Kerala.
- ❖ Bank of India has put up 50 non performing accounts with Rs 5,557.73 crore outstanding for sale.
- ❖ Usha Martin hopes to sell its steel business within the end of this financial year to pare debt despite the arm posting a rebound in both revenue and profitability in the first quarter of FY19.
- ❖ Ion Exchange has signed a contract for engineering, procurement, supply and construction of water treatment plant worth Rs 438.84 crore.

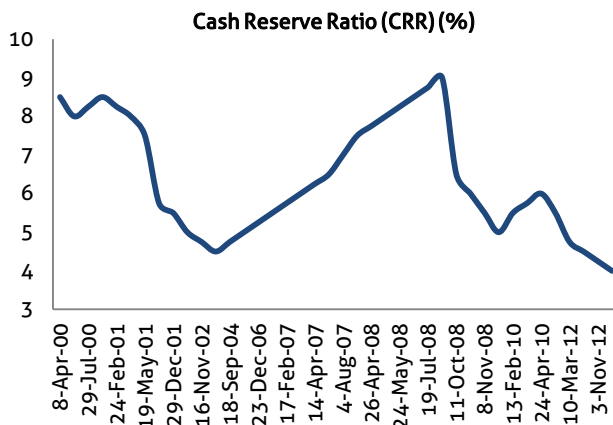
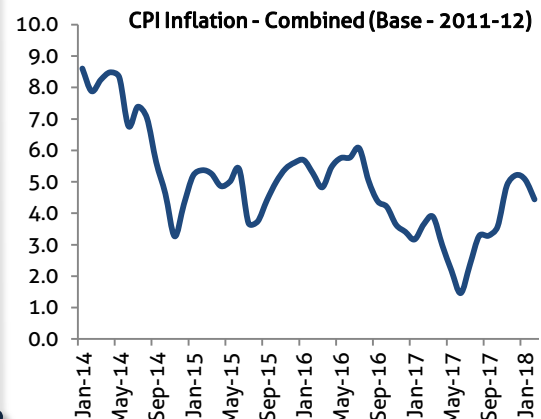
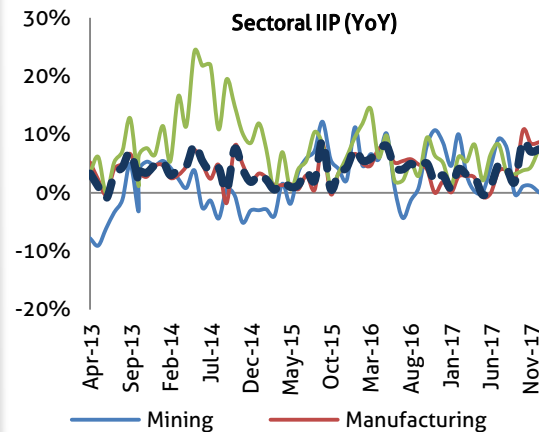
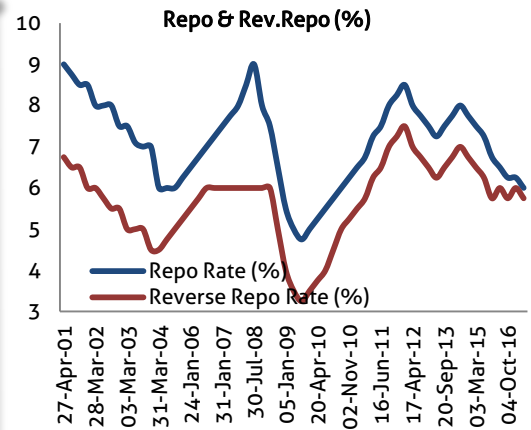
| Global Forex | Closing | Chg | % Chg |
|--------------|---------|----------|--------|
| EUR-USD | 1.1380 | 0.0003 | 0.03 |
| GBP-USD | 110.88 | (0.0300) | (0.03) |
| USD-JPY | 1.2720 | 0.0006 | 0.05 |

| Bond Markets | Closing | Chg |
|----------------|---------|----------|
| 10-yr bond | 7.98 | 3.40 bps |
| Interbank call | 6.44 | 6.36 bps |



Domestic News (Cont...)

- ❖ Lemon Tree Hotels has signed a license agreement for a 90-room property at Vijayawada, Andhra Pradesh, under Red Fox Hotel brand.
- ❖ AstraZeneca Pharma has received permission from the Drug Controller General of India (DCGI) to import and market olaparib tablets used for the treatment of ovarian and breast cancer.
- ❖ Sun Pharma has received approval for CEQUA (cyclosporine ophthalmic solution), from US FDA.
- ❖ Dr. Reddy's Laboratories to receive US drug regulator's approval for blockbuster cancer drug imatinib mesylate.
- ❖ Persistent Systems has partnered with Three Phase Electric to develop IoT solutions.
- ❖ TCS has signed a new contract with The Improvement Service to deliver further digital transformation in Scotland.
- ❖ Tech Mahindra has signed a four-year technology partnership deal with US-based football team Jacksonville Jaguars.
- ❖ KNR Construction may sell four of its HAM (Hybrid Annuity Model) projects, reported a leading business daily. The company is said to be in talks with private equity firm Brookfield and Cube Highway for the deal.
- ❖ BEML plant has launched India's first indigenously developed 150T Electric Drive Rear Dump Truck.
- ❖ Maruti Suzuki has hiked prices of its vehicles by up to Rs 6,100, effective August 16.
- ❖ MCX signed an MoU with India Bullion and Jewellers Association (IBJA), the apex industry body for all bullion and jewellery associations in India on various cooperation activities for the growth and development of bullion industry.
- ❖ Cosmo Films launches cast polypropylene (CPP) metalized film to offer superior inter-layer bond strength for making multi-layer laminate structures, which in turn enhances barrier properties.
- ❖ Hero MotoCorp has made an entry into the used two-wheeler business to offer buyers an option to exchange their old motorcycle or scooter while purchasing a new Hero product.
- ❖ Airtel Payments Bank and Bharti AXA Life Insurance announced a pact to offer Pradhan Mantri Jeevan Jyoti Bima Yojana (PMJJBY), leveraging the payments bank's network in rural pockets.



Bulk Deal - NSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------------------|---|----------|-------------|-------|
| 16-Aug-18 | Reliance Comm. Ltd. | SHAASTRA SECURITIES TRADING PRIVATE LIMITED | SELL | 23996579 | 19.7 |
| 16-Aug-18 | Housing Development and I | ADROIT FINANCIAL SERVICES PRIVATE LIMITED | SELL | 5921535 | 28.7 |
| 16-Aug-18 | Ajmera Realty & Inf I Ltd | ARIIL TRUST . | BUY | 600000 | 202.2 |
| 16-Aug-18 | Rolta India Ltd. | AMBE SECURITIES PRIVATE LIMITED | SELL | 1500000 | 35.5 |
| 16-Aug-18 | Lincoln Pharma Ltd | KIRJAL SECUTIES PVT. LTD | SELL | 186304 | 274.8 |

Bulk Deal - BSE

| Date | Security Name | Client Name | Buy/Sell | Traded Qty. | Price |
|-----------|---------------|--|----------|-------------|-------|
| 16-Aug-18 | HOCL | J M GLOBAL EQUITIES PVT LTD | S | 592,003 | 34.2 |
| 16-Aug-18 | TOYAMIND | GIRISHBHAI SHANTILAL VARIA | S | 2,200,000 | 4.8 |
| 16-Aug-18 | BCP | GIRISHBHAI SHANTILAL VARIA | B | 295,000 | 34.3 |
| 16-Aug-18 | BHARATAGRI | DEVJYOT TRADE AND INVESTMENT PRIVATE LIMITED | S | 47,347 | 162.7 |
| 16-Aug-18 | TAALENT | DHEERAJ KUMAR LOHIA | B | 30,096 | 237.3 |

Corporate Actions

| Scrip Code | Scrip Name | Ex-Date | Purpose | Record Date |
|------------|-------------|-----------|---------------------------------|-------------|
| 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 | Final Dividend - Rs. - 0.7500 | - |
| 533519 | L&TFH | 20-Aug-18 | Dividend - Rs. - 1.0000 | - |
| 524816 | NATCOPHARM | 20-Aug-18 | Interim Dividend - Rs. - 1.5000 | 21-Aug-18 |
| 504093 | PANAENERG | 20-Aug-18 | Dividend - Rs. - 7.0000 | - |
| 538666 | SHARDACROP | 20-Aug-18 | Final Dividend - Rs. - 2.0000 | - |
| 530759 | STERTOOLS | 20-Aug-18 | Interim Dividend - Rs. - 2.0000 | 21-Aug-18 |
| 532733 | SUNTV | 20-Aug-18 | Interim Dividend - Rs. - 5.0000 | 21-Aug-18 |
| 540180 | VBL | 20-Aug-18 | Interim Dividend - Rs. - 2.5000 | 21-Aug-18 |
| 500101 | ARVIND | 21-Aug-18 | Final Dividend - Rs. - 2.0000 | - |
| 532848 | DELTACORP | 21-Aug-18 | Interim 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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