

| Indices      | CMP   | %1D   |
|--------------|-------|-------|
| Sensex       | 33835 | -0.06 |
| Nifty        | 10410 | -0.15 |
| BSE-Midcap   | 16315 | 0.28  |
| BSE-Smallcap | 17612 | 0.06  |
| SGX Nifty    | 10405 | -0.24 |

| Sector        | CMP   | %1D   |
|---------------|-------|-------|
| Capital Goods | 18691 | -0.10 |
| Realty        | 2422  | -0.52 |
| Consumer Dur  | 21789 | 0.32  |
| Metal         | 14323 | -0.48 |
| Oil & Gas     | 15477 | -0.94 |
| Teck          | 6690  | 0.12  |

| Index      | FY17 | FY18E | FY19E |
|------------|------|-------|-------|
| Sensex EPS | 1469 | 1785  | 1958  |
| P/E        | 24   | 20    | 18    |
| Nifty EPS  | 466  | 575   | 623   |
| P/E        | 24   | 19    | 18    |

| Trading activity in cash Rs Cr |      |      |        |
|--------------------------------|------|------|--------|
| Date 14 March                  | Net  | MTD  | FY18   |
| FII                            | -258 | 7107 | -79315 |
| DII                            | -432 | 844  | 109080 |

| Global Indices | Current Value | %1D   |
|----------------|---------------|-------|
| DowJones       | 24834         | -0.69 |
| Nasdaq         | 7525          | 0.20  |
| DAX            | 12237         | 0.14  |
| Nikkei 225     | 21777         | -0.88 |
| FTSE 100       | 7132          | -0.09 |
| Hang Seng      | 31435         | -0.53 |
| Shanghai       | 3291          | -0.58 |
| Straits Times  | 3539          | -0.40 |

| Forex Rate |       |       |
|------------|-------|-------|
|            |       |       |
| USD/INR    | 64.95 | 0.05% |
| EUR/INR    | 80.09 | 0.61% |
| GBP/INR    | 90.23 | 0.65% |
| JPY/INR    | 60.85 | 0.23% |

| G-Sec Yield     |       |         |
|-----------------|-------|---------|
|                 | Price | Change% |
| 1yr Bond Yield  | 6.68  | 0.12    |
| 10yr Bond Yield | 7.67  | 0.26    |

## Market Outlook

Indian markets are expected to open with a negative note backed by mix global sentiments. Market has to sustain the 10350 levels to be stable. On overall basis direction for the markets are on sideways consolidation. Nifty major supports near 10300. We advise investors to start accumulating quality counters.

## Top Domestic News

- Andhra Bank - The lender has kept 1-Year MCLR At 8.4 percent.
- Hdfc Life - Gave 31,65,606 options as ESOPs at Rs 10 face value.
- Asian Granito - The company is in process to enter in JV with local partner to establish 10,000 meters per day glaze vitrified tile manufacturing unit in Andhra Pradesh.
- ICICI Securities IPO opens on Mar 22, fixes price band at Rs 519-520.
- Bharat Dynamics IPO subscribed 46% on second day of bidding.
- Bandhan Bank raises Rs 1,342 cr from anchor investors.
- Tata Comm to deploy 15,000 street lights on IoT network in 5 yrs.
- Tata Teleservices to phase out CDMA service in Delhi from Mar 19.
- Bharti Airtel approves allotment of debentures to raise Rs 3,000 cr.
- Himadri Speciality to invest additional Rs 1,000 cr in Bengal.
- Jet Airways adds 144 new weekly flights this summer.
- TVS Motor launches Apache RTR 160 4V priced at Rs 81,490.
- MMTC to consider and approve the proposal for issue of bonus share on March 19.
- Network 18 Media - RBI gave No objection for merger of foreign wholly owned subsidiaries in to company.
- Welspun Enterprises emerge lowest bidder (L-1) for a project of six lanning in the state of Tamil Nadu.
- Binani Cement creditors pick Dalmia Bharat – ET.

## Global News

US stocks fell on Wednesday after President Donald Trump sought to impose fresh tariffs on China, intensifying fears of a trade war that could raise costs and hurt overseas sales for US companies, Reuters reported. Asian markets edged slightly lower on Thursday, with regional stock indexes recording slight losses after Wall Street declined amid concerns over heightened trade tensions. The Nikkei 225 eased 0.18 percent as the yen firmed. The Kospi slipped 0.12 percent, CNBC reported.

## NSE Top Gainers

| Script     | LTP     | %1D  |
|------------|---------|------|
| TECHM      | 640.00  | 3.37 |
| AMBUJACEM  | 244.95  | 2.58 |
| BAJFINANCE | 1719.00 | 2.28 |
| YESBANK    | 318.00  | 1.66 |
| ULTRACEMCO | 4237.00 | 1.61 |

## NSE Top Losers

| Script     | LTP     | %1D   |
|------------|---------|-------|
| IOC        | 394.60  | -3.25 |
| INFRATEL   | 338.25  | -3.08 |
| HINDPETRO  | 375.20  | -2.02 |
| HEROMOTOCO | 3642.00 | -1.60 |
| ONGC       | 180.75  | -1.55 |

## BSE Top Gainers

| Script     | LTP    | %1D   |
|------------|--------|-------|
| IDBI       | 73.85  | 10.22 |
| JPASSO     | 16.30  | 9.40  |
| JAICORPLTD | 141.20 | 7.38  |
| DISHTV     | 71.20  | 7.15  |
| ORIENTBNK  | 101.20 | 6.08  |

## BSE Top Losers

| Script     | LTP     | %1D   |
|------------|---------|-------|
| IIFL       | 813.55  | -4.30 |
| GDL        | 205.40  | -3.93 |
| DEEPAKFERT | 323.00  | -3.81 |
| IBVENTURES | 259.55  | -3.76 |
| BBTC       | 1293.00 | -3.73 |

## Technical View



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