

Dated: 20th April 2018

Indices	CMP	%1D
Sensex	34427	0.28
Nifty	10565	0.37
BSE-Midcap	16873	0.63
BSE-Smallcap	18174	0.60
SGX Nifty	10535	-0.51

Market Outlook

Indian markets are expected to open on flat negative note backed by mixed global sentiments. As long as it holds above 10,480, it could extend the gains above 10600 then 10,650 while supports at 10,480 and 10,440. On overall basis direction for the markets are on positively consolidation focusing on better than expected results season.

Index	FY18	FY19E	FY20E
Sensex EPS	1468	1769	2251
P/E	23	19	15
Nifty EPS	462	564	705
P/E	23	19	15

Top Domestic News

- TCS: Q4 profit up 5.7 percent QoQ at Rs 6,904 crore, EBIT margin at 25.4 percent; approves 1:1 bonus.
- Cyient: Q4 net up 16.2 percent to Rs 121.5 crore.
- Defence stocks start rising after Expo boost.
- Fortis Health: Company focusing on binding offers only, advisory panel to meet on April 25.
- Thomas Cook: The company has purchased 4.4 percent in Travel Corporation of India.
- Indian Metals & Ferro Alloys: Company gets Rs 123 crore notices for excessive mining.
- ABG Shipyard: Liberty House UK moves NCLT to challenge resolution professional's decision.
- Kakatiya Cement: Company resumes operation at Telangana plant after its closure on pollution grounds.
- JB Chemicals: Company gets orders from pollution control board directing closure of formulation unit at Daman.
- TCS Q4 profit rises 4.5%; approves 1:1 bonus issue.
- Oil soars to 3-yr high as Saudi withholds supply, seeking \$80-100 a barrel.
- Net interest income boosts IndusInd Bank net profit up 27%.
- Religare Enterprises: Company raises Rs 145 crore via issue of 11.14 crore warrants at Rs 52.30 each on preferential basis.
- SC allows Sahara to sell properties in Aamby Valley by May 15.
- Stocks on radar for March quarter numbers: Indiabulls Housing Finance, Saskaen Technologies.
- Godrej Security eyes 20% growth in home safes biz.
- Metal stocks shine as LME aluminium hits near 7-year high.

Global Indices	Current Value	%1D
DowJones	24664	-0.34
Nasdaq	7238	-0.79
DAX	12567	-0.19
Nikkei 225	22157	-0.15
FTSE 100	7328	0.16
Hang Seng	30589	-0.39
Shanghai	3105	-0.38
Straits Times	3569	-0.81

Trading activity in cash Rs Cr			
Date	19 April	Net	MTD
FII		-625	-5814
DII		449	5490
			FY19
			-5814
			5490

Forex Rate

USD/INR	65.78	0.15%
EUR/INR	81.38	0.10%
GBP/INR	93.41	-0.61%
JPY/INR	61.22	0.02%

Corporate Action

Stock Name	Purpose	Ex Date
GRUH FINANCE LTD	Dividend	Rs.3.3 23rd April
CASTROL INDIA	Final Div	Rs.2.5 25th April
MINDTREE	Int Div	Rs.2 25th April
NBCC	Stock Split	25th April
HUHTAMAKI PPL	Dividend	Rs.3.3 25th April

Global News

Wall Street's three major indexes closed lower on Thursday, with tobacco stocks leading a tumble in consumer staples while concerns about smartphone demand hurt the technology sector and rising bond yields and earnings helped financials rebound. The Dow Jones Industrial Average fell 83.18 points, or 0.34 %, to 24,664.89, the S&P 500 lost 15.51 points, or 0.57 %, to 2,693.13 and the Nasdaq Composite dropped 57.18 points, or 0.78 %, to 7,238.06. Asian shares slipped on Friday as a warning on smartphone demand from the world's largest contract chipmaker slugged the tech sector, while lofty oil prices stirred inflation fears and undermined sovereign bonds. Stocks in South Korea took an early 0.4 % dip with the tech sector losing 1.6 %. Japan's Nikkei fell 0.5 % with tech down 0.9 %. MSCI's broadest index of Asia-Pacific shares outside Japan shed 0.4 %.

G-Sec Yield

Price	Change%
1yr Bond Yield	6.62 0.39
10yr Bond Yield	7.63 1.26

Results Calender

Date
20-Apr-18
20-Apr-18
21-Apr-18
23-Apr-18
23-Apr-18
23-Apr-18
23-Apr-18

F&O Ban List

BALRAMCHINI, IRB, JETAIRWAYS, JPASSOCIATE, RCOM, TV18BRDCST.



MSEARCH

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Technical View

NIFTY



BANK NIFTY





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