

Dated: 30th May 2018

Indices	CMP	%1D
Sensex	34949	-0.61
Nifty	10633	-0.52
BSE-Midcap	16047	-0.44
BSE-Smallcap	17380	-0.26
SGX Nifty	10536	-0.68

Market Outlook

Indian markets are expected to open on unconstructive note backed by global sentiments and volatile expiry due tomorrow. It formed a bullish candle on the daily scale and made higher highs - higher lows for 3rd consecutive session. As long as it holds above 10,620, it may extend its gains towards 10,735 and then max to 10,800 while supports are seen at 10,620 then 10,550. On overall basis direction for the markets are on range consolidation focusing on results season.

Index	FY18	FY19E	FY20E
Sensex EPS	1528	1751	2249
P/E	23	20	16
Nifty EPS	477	557	702
P/E	22	19	15

Top Domestic News

- Avenue Supermarts: Incorporates Reflect Wholesale and Retail on May 28, 2018.
- Fortis Healthcare: The firm has started fresh bidding process; Munjal-Burman's offer stands mutually terminated.
- ICICI Bank: Appoints MD Mallya as an additional independent director on board w.e.f May 29.
- Wheels India: Q4 net at Rs 19.5 crore
- Glenmark Pharma: Q4 net profit at Rs 151.6 crore and revenue at Rs 2,279.8 crore
- Dilip Buildcon Q4: Net profit at Rs 217.4 crore and revenue up 46% at Rs 2,557.9 crore
- Greenply Industries: Q4 net profit at Rs 32.6 crore
- Eveready Industries: Q4 net loss at Rs 16.2 crore
- Balmer Lawrie: Q4 net profit at Rs 87.9 crore
- Reliance Infratel settles dispute with investor; withdraws petition for asset sales
- IndiGo to levy up to Rs 400 fuel surcharge; fares to rise
- ITI eyeing FPO in July-August: Official
- ICICI Prudential Mutual Fund bought 27,50,000 shares of Tata Motors DVR at Rs 170.97
- HDFC Mutual Fund bought 5,73,000 shares of Vardhman Textiles at Rs 1,245
- Rcom clearing way for deal with Jio - ET
- JSW Steel, Vedanta vie for Usha Martin's specialty steel business - ET

Global Indices	Current Value	%1D
DowJones	24361	-1.58
Nasdaq	7396	-0.50
DAX	12666	-1.53
Nikkei 225	21958	-1.79
FTSE 100	7632	-1.26
Hang Seng	30005	-1.57
Shanghai	3064	-1.78
Straits Times	3440	-2.20

Trading activity in cash Rs Cr				
Date	29 May	Net	MTD	FY19
FII		-407	-11050	-20330
DII		578	14819	23331

Forex Rate		
USD/INR	67.82	0.56%
EUR/INR	78.69	-0.39%
GBP/INR	90.16	0.30%
JPY/INR	62.27	0.84%

Corporate Action		
Stock Name	Purpose	Ex Date
TCS	BONUS	1:1 31st May
TCS	Dividend	Rs 29 31st May
HDFC BANK	Dividend	Rs 13 31st May
HATSUN AGRO	Int Div	Rs 3 31st May
HATSUN AGRO	Right Iss	31st May
PAGE IND	Int Div	Rs 35 31st May

G-Sec Yield	Price	Change%
1yr Bond Yield	7.12	0.74
10yr Bond Yield	7.76	0.25

Global News

The S&P 500 and the Dow Jones Industrial Average registered their biggest one-day %age drops in a month on Tuesday as political turmoil in Italy sparked concerns about the stability of the euro zone and shares of US banks tumbled. Italy has been unable to assemble a coalition government since inconclusive elections in March, which saw the rise of anti-establishment parties that support leaving the euro. The most recent nominee for prime minister failed to secure support from the country's major political parties. Asian shares extended a global sell-off in early trading Wednesday as Italy's political crisis provoked a heavy retreat on Wall Street, sent the euro to a 10-month low and pushed up borrowing costs for the government in Rome. MSCI's broadest index of Asia-Pacific shares outside Japan was down 1.1 %, while Japan's Nikkei average shed 1.7 % to hit a six-week low. South Korea's KOSPI and the Australian stock benchmark slipped 1.6 % and 0.7 %, respectively.

Results Calender

30-May-18

8KMILES, AEGIS, ALKEMLABS, APOLLOHOSP, APARIND, BANCO, BERGERPAINTS, BHARATDYNA, BHARATRASAY, CANARABK, BOROSILGLASS, MIDHANI, MTNL, MAYUR UNIQOUTERS, INFOEDGE, NAVABHARAT, OPTIEMUS, ONGC, RCOM, SAIL, SATINCREDITCARE, CGPOWERBBPH, DEEPAKFERT, EIH, FORTISHEALTH, GAYATRIPROJ, GARWAREWALL, GOCL, GMRINFR, GRINDWELL, HAL, HAWKINSOOCK, V2RETAIL, V-GUARD, HUDCO, HSIL, HINDCOPPER, INDOSTARCAP, HGS, INFIBEAM, ITDC, JKBANK, KAMAHOLD, KNRCONS, LAOPALA, KUSHALLTD, MANPASANDBEV, MCLEOD, SUZLONIND, SWANENRGY, TORRENTPHRM

F&O Ban List

BALRAMCHIN, DHFL, IDBI, JETAIRWAYS, JPASSOCIAT, JUSTDIAL



MSEARCH

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Technical View

NIFTY



NIFTY BANK





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