

| Indices | CMP | %1D |
|--------------|-------|------|
| Sensex | 33788 | 0.48 |
| Nifty | 10379 | 0.46 |
| BSE-Midcap | 16622 | 0.16 |
| BSE-Smallcap | 17951 | 0.38 |
| SGX Nifty | 10426 | 0.33 |

| Sector | CMP | %1D |
|---------------|-------|-------|
| Capital Goods | 18926 | 0.67 |
| Realty | 2291 | -0.13 |
| Consumer Dur | 22570 | 1.70 |
| Metal | 13656 | 0.19 |
| Oil & Gas | 15048 | 1.52 |
| Teck | 6489 | -0.99 |

| 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 9 April | Net | MTD | FY19 |
| FII | -1300 | -2662 | -2662 |
| DII | 360 | 3020 | 3020 |

| Global Indices | Current Value | %1D |
|----------------|---------------|-------|
| DowJones | 23979 | 0.19 |
| Nasdaq | 6950 | 0.51 |
| DAX | 12261 | 0.17 |
| Nikkei 225 | 21718 | 0.18 |
| FTSE 100 | 7194 | 0.15 |
| Hang Seng | 30336 | 0.35 |
| Shanghai | 3140 | 0.08 |
| Straits Times | 3436 | -0.39 |

| Forex Rate | | |
|------------|-------|---------|
| | Price | Change% |
| USD/INR | 64.92 | -0.09% |
| EUR/INR | 79.68 | 0.21% |
| GBP/INR | 91.49 | 0.59% |
| JPY/INR | 60.66 | 0.20% |

| G-Sec Yield | | |
|-----------------|-------|---------|
| | Price | Change% |
| 1yr Bond Yield | 6.45 | -0.09 |
| 10yr Bond Yield | 7.17 | 0.67 |

Market Outlook

Indian markets are expected to open with a flat positive note backed by stable global sentiments. We expect Markets has to sustain at these levels to be stable. On overall basis direction for the markets are on sideways consolidation. Technically Nifty has major resistance near 10440 while We expect there would be some profit booking attempts near the resistance. Hence We need to focus on quality companies and start building portfolio for long term.

Top Domestic News

- Axis Bank: Shikha Sharma asks Board to reconsider period of her re-appointment as Bank Head. Board has accepted Shikha Sharma's request pending approval from RBI.
- HDFC hikes retail prime lending rate by 20 bps w.e.f April 1
- Alembic to buyback 1,02,50,000 equity shares at Rs 80 per share
- Wipro: Telecom client in India filed petition to initiate CIRP with NCLT. Company likely to see negative impact of 65-75 bps on net income level
- HealthCare Global Enterprises approved the allotment of 9,34,500 equity shares at Rs 321 per share on Preferential basis to promoter of the company
- ICICI Bank: Fitch has said that allegations pose reputational risks and will take appropriate action if risks to reputation and financial profile rise
- IDFC Bank: The lender has cut MCLR across all tenors by 5bps effective April 8
- Gravita starts commercial production of PPCP Granules from its Chittoor plant
- Max Financial Services approves fund raising proposals
- Unitech: It has submitted a List Of Assets As Directed By SC
- SpiceJet: The airline said that it is not considering partnership with foreign airline to bid for Air India
- Merrill Lynch buys ICICI Bank shares worth Rs 823 cr
- Syndicate Bank keeps MCLR unchanged across all tenors
- Ashok Leyland to invest Rs 400cr in LCV push - ET
- Jet Airways not to bid for Air India - BS
- Indian Overseas Bank signs MoU with SMC Global Securities - FE

Global News

Wall Street's major indexes rose on Monday as a softer stance by U.S. policymakers on China tariffs powered a rebound from last week's selloff, but stocks pared much of their gains late in the session after a report that the Federal Bureau of Investigation raided the office of President Donald Trump's lawyer, Reuters reported. Asian shares edged lower on Tuesday as Wall Street retreated from its highs. The Nikkei 225 edged down by 0.59 percent and the Topix slipped 0.44 percent. South Korea's Kospi index, meanwhile, lost 0.68 percent, Reuters reported.

NSE Top Gainers

| Script | LTP | %1D |
|-----------|--------|------|
| BPCL | 450.35 | 3.78 |
| AXISBANK | 517.40 | 3.44 |
| HINDPETRO | 366.00 | 3.40 |
| HINDALCO | 221.00 | 3.27 |
| IOC | 179.75 | 3.16 |

NSE Top Losers

| Script | LTP | %1D |
|------------|---------|-------|
| ZEEL | 572.00 | -2.14 |
| LUPIN | 794.50 | -1.80 |
| TATAMOTORS | 358.25 | -1.61 |
| INFY | 1111.45 | -1.38 |
| BHARTIARTL | 380.00 | -1.29 |

BSE Top Gainers

| Script | LTP | %1D |
|-------------|---------|------|
| IBVENTUREPP | 132.35 | 8.53 |
| ABAN | 176.80 | 8.47 |
| LINDEIND | 499.85 | 6.00 |
| BALKRISH | 1281.75 | 5.02 |
| BOMBDYEING | 261.75 | 4.91 |

BSE Top Losers

| Script | LTP | %1D |
|-----------|--------|-------|
| VIDEOIND | 14.12 | -6.49 |
| VAKRANGEE | 162.65 | -4.99 |
| JUSTDIAL | 446.80 | -3.68 |
| MGL | 979.25 | -3.32 |
| MPHASIS | 891.45 | -2.91 |

Technical View



There is a negative divergence in RSI. So a short up move can be seen on monday. Resistance at 10175(100 day moving average).

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