

| Indices      | CMP   | %1D   |
|--------------|-------|-------|
| Sensex       | 34297 | 0.41  |
| Nifty        | 10545 | 0.42  |
| BSE-Midcap   | 16803 | -0.46 |
| BSE-Smallcap | 18258 | -1.27 |
| SGX Nifty    | 10584 | 0.26  |

| Sector        | CMP   | %1D   |
|---------------|-------|-------|
| Capital Goods | 19459 | -0.83 |
| Realty        | 2501  | -0.85 |
| Consumer Dur  | 21119 | -0.86 |
| Metal         | 15366 | 0.72  |
| Oil & Gas     | 15733 | 0.96  |
| Teck          | 6550  | 0.22  |

| 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 15 February               | Net  | MTD   | FY18   |
| FII                            | -240 | -7991 | -75802 |
| DII                            | 50   | 6658  | 97087  |

| Global Indices | Current Value | %1D   |
|----------------|---------------|-------|
| DowJones       | 25034         | 0.57  |
| Nasdaq         | 7208          | 0.90  |
| DAX            | 12331         | -0.07 |
| Nikkei 225     | 21464         | 1.45  |
| FTSE 100       | 7226          | 0.17  |
| Hang Seng      | 31115         | 1.93  |
| Shanghai       | 3199          | 0.45  |
| Straits Times  | 3443          | 1.18  |

| Forex Rate |       |        |
|------------|-------|--------|
|            |       |        |
| USD/INR    | 63.98 | -0.33% |
| EUR/INR    | 79.86 | 0.68%  |
| GBP/INR    | 89.93 | 1.05%  |
| JPY/INR    | 60.03 | 0.47%  |

| G-Sec Yield     |       |         |
|-----------------|-------|---------|
|                 | Price | Change% |
| 1yr Bond Yield  | 6.71  | 0.10    |
| 10yr Bond Yield | 7.57  | 1.01    |

## Market Outlook

Indian markets are expected to open with a flat positive note backed by mixed global sentiments. On overall basis direction for the markets are on consolidation note. Nifty major supports near 10300. We advise investors to start accumulating quality counters and watch strategy for the time being.

## Top Domestic News

- Daiichi-Fortis Case SC lifts stay on sale of encumbered Fortis health shares by Singh brothers.SC allows sale of Fortis health shares pledged with lenders.
- Supreme Court Says: Daiichi-Fortis Case Status quo to not apply to Fortis shares encumbered before Aug 11, 2017.
- PNB Fraud- DFS Secy Says Nobody Will Be Spared In The PNB Fraud Case .PNB Fraud Case Is An Isolated One. PNB Matter Was Not Rolled Over Because Of Pressure To Clean Up Banks. PNB Case Is A Systemic Issue & Needs To Be Looked Into.
- CNBC-TV18 Exclusive ED Sources Say: (Confirmed Minutes Later By ED Tweet) ED Seizes Diamonds, Jewelry, Gold Worth `5,100 Cr During Searches In Nirav Modi Case. ED Raided 17 Locations In Cities Incl Delhi, Mumbai, Hyderabad, Jaipur. Raids Continue, Valuation Of Tangible & Intangible Assets Seized To Increase Further.
- Idea Cellular board to meet on Feb 21 to consider the issue price of shares to be allotted under the QIP.
- TV18 Home shopping network ltd and NW18 HSN Holding Plc cease to be subsidiaries of the Co Home shop 18 and Shop CJ aggregate their business operations.
- Capital First to consider and approve private placement of NCDs on Feb 21
- Indgrid Trust to acquire three power transmission assets from Sterlite Power Grid Ventures Ltd
- Future Consumer To allot NCDs for an amount not exceeding 150cr. Raises Rs200cr debt from UK's CDC Group.
- IDBI Bank divested 30% stake in NSDL E-governance Infrastructure
- Indoco Remedies granted EU FMP Certification for Goa plant III
- Sunteck Realty issuance of commercial paper of Rs 50cr
- Yes Bank to consider proposal to raise funds via debt securities or on private placement basis on Feb 20
- PNB may be liable to pay foreign branches.

## Global News

Wall Street surged on Thursday to notch its fifth straight session of gains, led by Apple and other technology stocks as investors shrugged off recent inflation worries that sent the market into a sell-off at the start of the month. The Dow Jones Industrial Average rose 306.88 points, or 1.23 %, to 25,200.37, the S&P 500 gained 32.57 points, or 1.21 %, to 2,731.2 and the Nasdaq Composite added 112.82 points, or 1.58 %, to 7,256.43, Reuters reported. Gains on Wall Street lifted Asian equities on the last day of the week, but trading in the region was subdued with many markets shut for the Lunar New Year holiday. Japan's benchmark Nikkei rallied 1.26 % as the yen weakened, CNBC reported.

## NSE Top Gainers

| Script    | LTP    | %1D  |
|-----------|--------|------|
| BPCL      | 475.65 | 3.38 |
| HINDALCO  | 251.40 | 3.35 |
| ICICIBANK | 328.75 | 3.07 |
| VEDL      | 324.20 | 2.68 |
| HINDPETRO | 390.85 | 2.14 |

## NSE Top Losers

| Script     | LTP     | %1D   |
|------------|---------|-------|
| IBULHSGFIN | 1311.75 | -2.70 |
| AUOPHARMA  | 592.00  | -1.68 |
| CIPLA      | 606.05  | -1.64 |
| BHARTIARTL | 428.70  | -1.40 |
| ZEEL       | 571.00  | -0.97 |

## BSE Top Gainers

| Script     | LTP     | %1D  |
|------------|---------|------|
| BOMBDYEING | 281.30  | 7.88 |
| VAKRANGEE  | 233.80  | 4.98 |
| RELIGARE   | 57.65   | 4.91 |
| NESTLEIND  | 7585.35 | 4.48 |
| PRESTIGE   | 324.50  | 3.77 |

## BSE Top Losers

| Script     | LTP    | %1D    |
|------------|--------|--------|
| PNB        | 128.35 | -11.97 |
| REPCOHOME  | 554.45 | -7.95  |
| MAXINDIA   | 104.65 | -6.60  |
| JETAIRWAYS | 756.15 | -5.89  |
| TWL        | 133.25 | -5.80  |

## Technical View

Nifty 50, India  
 MA (200, close, 0) 9866.8793  
 MA (100, close, 0) 10180.2700  
 MA (50, close, 0) 10351.4070

Nifty has achieved DOUBLE BOTTOM patterns target. Nifty made a doji candlestick pattern. It is very important that Nifty closes above 10660 for more bullish upmove.



Nifty Bank, India  
 MA (200, close, 0) 24041.8720  
 MA (100, close, 0) 24945.1030  
 MA (50, close, 0) 25464.6169

Bank Nifty has made a doji candlestick pattern. One can expect a small down fall. Strong support at 100DMA and 24850.



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