

KEY LEVELS

Support 1 :10730
Support 2 :10686

Resistance 1:10786
Resistance 2 : 10830

Event Today

Dividend

AMJLAND Rs.0.2

CCL Rs.2.5

HITEHCORP Rs.0.9

INDIANHUME Rs.3.4

JSWSTEEL Rs.3.2

PDMJEPAPER Rs.0.15

ROLCOEN Rs.0.5

VIPIND Rs. 2.0

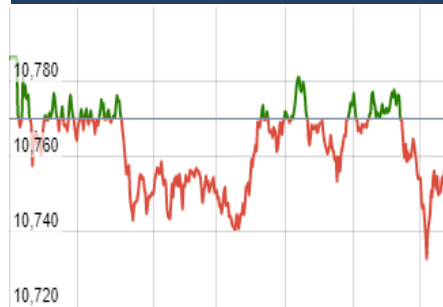
Ex- Date: 6th July 2018

Bonus

SRESTHA 1:10

Ex- Date: 6th July 2018

Nifty Intraday Chart



Market Outlook

Yesterday, Nifty opened in positive, where open & high remained the same. From there it started moving towards the downside to hit the low & closed in negative at 10750 by discounting by 20 points. It hit the high of 10786 & low of 10726 levels. On sectoral front AUTO, FMCG, PVT BANK, FIN SERVICE, Media flat to positive, whereas PSU BANK, IT, PHARMA, Metals, REALTY traded negative. India vix fell down by -0.41% to 12.60. Nifty gave zigzag move in the range of 10730-10787 throughout yesterday. The immediate crucial resistances of the index are 10840 & 10930. The stochastic is approaching towards overbought zone. Therefore profit booking is likely to emerge in the extreme short term. So it would be the prudent decision to book profit of the long positions around the stiff resistance areas of Nifty. However key resistance s are around 10786-10830 and immediate supports are seen around 10730-10686.

Market

Market	Value	% Change
Morning Traded Market		
SGX NIFTY	10,721.00	-0.34%
NIKKEI	21,686.00	0.65%
HANG SENG	28,075.00	-0.38%
Yesterday Closing Market		
Sensex	10,750.00	-0.19%
Nifty	35,574.00	-0.20%
DOW	24,357.00	0.75%
NASDAQ	7,586.00	1.12%
CAC	5,336.00	0.86%
DAX	12,464.00	1.19%
FTSE	7,603.00	0.40%
EW ALL SHARE	18,858.00	-0.25%

% Change in 1 day

Commodity Price (Yesterday Closing)

Commodity/Currencies	Value	% Change
GOLD	30650.00	0.12%
SILVER	39881.00	-0.10%
CRUDEOIL	77.03	-0.40%
NATURALGAS	196.50	0.15%
RS./DOLLAR	68.94	0.29%
RS./EURO	80.65	0.84%
RS./POUND	91.40	0.72%

% Change in 1 day

Institutional Turnover

FII			
Investor	Buy(Cr.)	Sale(Cr.)	Net(Cr.)
05-Jul-18	3871	4030	(159)
Jul-18	10374	12781	(2408)
2018	687707	723615	(35909)
DII			
Investor	Buy(Cr.)	Sale(Cr.)	Net(Cr.)
05-Jul-18	3387	3684	(297)
Jul-18	9673	9325	349
2018	500612	436585	64027

Quote of the Day : "Only buy something that you'd be perfectly happy to hold if the market shut down for 10 years."

FMCG

"Result Pre View"

6th July 2018

With two consecutive good monsoon, pro rural budget, higher MSP's , government's rural infrastructure initiatives and upcoming election , we see strong rural demand going ahead which will help FMCG companies in garnering strong volume growth. Gross margin is likely to be impacted due to inflation in input prices but cost efficiency measures and price hike taken by company will help in maintaining EBITDA margin. From here on, pricing has to play greater role. On International business front, the companies which have higher presence in the MENA region will be benefitted due to improving macro condition there. We are optimistic on FMCG as whole for coming 2-3 years. Our top picks are Britannia and GODREJCP while we are also bullish on Dabur, Hindunilvr and Baiaicorp considering rural demand revival.

Information Technology

"Result Pre View"

5th July 2018

Post a mixed revenue and margin performance by IT sector(TCS , INFOSYS, CYIENT and PERSISTENT) in 2018 ,mainly impacted by weakness in BFSI /Retail vertical ,softness in North America and Tax issue , FY19 looks promising for most of the IT companies. Companies like TCS, LTI and PERSISTENT are expected to show double digit growth in revenue FY19E. With Improving macro in the US like low unemployment, rising interest rate ,Tax rebate , increased retail spending, higher outsourcing from European clients and rising digital proportion will lead to positive outlook for the IT sector as a whole. However, revenue growth in Q1FY19 will be mixed for our coverage companies as the banking vertical will continue to be a challenge and we expect to see upswing in growth to start towards 2HFY19E. We expect margins to fall marginally as wage hikes and visa costs are envisaged, however it is expected to be partially offset by INR depreciation and operational efficiencies.

*For details, refer to our daily report- *India Equity Analytics***Top News**

- Apollo Hospitals bought 50% stake in Medics International Life sciences.
- India Infoline Finance raising Rs 325 crore from CDC Group (A UK Govt-owned development finance institution) via rupee denominated Tier II bonds.
- ICRA has reaffirmed the long term rating of BBB- assigned earlier to the Rs 34 crore line of credit of the company Umang Dairies and has also assigned a long-term rating of BBB- to the additional limit of Rs 17 crore. The outlook on the long term rating is stable.
- Talwalkars Better Value Fitness has made investment in company in India - Zorba Renaissance Private Limited, which is registered with the Registrar of Companies, Chennai.
- Varroc Engineering to make stock market debut on July 06
- Goldcrest Corporation has fixed July 17 as record date to determine the equity shareholder(s)/eligible equity shareholder(s) of the company who shall be eligible to participate in the buy-back offer.
- Berger Paints has signed a shareholders' agreement with Rock Paint Co for the purpose of setting up of a joint venture company in India by the name of 'Berger Rock Paints Private Limited' or any other name as may be approved by the Registrar of Companies. The joint venture company shall be engaged in developing, producing and selling superior automotive refinish paints in India and Nepal.
- Phoenix Mills Island Star Mall Developers (ISMDPL), a strategic investment alliance owned by the company and Canada Pension Plan Investment Board (CPPIB) has now further acquired an additional adjoining land parcel in Wakad, Pune for a consideration of Rs 1.36 crore on July 4.
- Ind-Swift Laboratories: There is a minor fire incident at research and development centre of the company located at Mohali, Punjab. There is no loss of life.
- Barak Vally Cement's Miss Saakshi Manchanda has resigned from the post of company secretary & compliance officer of the company with effect from closure of working hours of July 04.
- Qess Corp has entered into a Memorandum of Understanding (MOU) with the East Bengal Club (EBC). The partnership will help Qess to improve its brand awareness and at the same time also contribute to sports participation and the development of football in the country.
- Info Edge, MacRitchie Investments to invest Rs 190.51 cr in PolicyBazaar.
- Welspun bags four laning contract from NHAI.
- Eicher gets BS-VI certification for CNG engine from ICAT
- Jasmine Capital Investments Pte bought 1,35,00,000 shares of Indiabulls Ventures
- Parag Milk Foods ties up with ColoPlus AB for 'colostrum'
- Tata Global Beverages to exit loss-making subsidiaries
- Indian Bank revises FCNR (Banking) term deposit rates
- CEAT inks MoU with TN govt to set up manufacturing unit

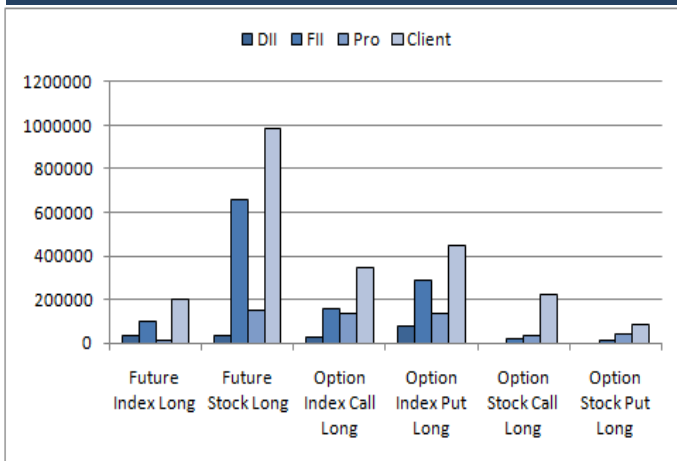
KEY Highlights:-

- *Jio and Retail's share in overall EBITDA has gone up to 13 percent from 2 percent.*
- *RIL's profits are up by 20.6 percent to Rs 36,075 crore FY18.*
- *Reliance has launched advanced fiber-based broadband connectivity service called JioGigaFibre. The new fibre service will redefine 24/7 emergency help for all homes across India.*
- *As per Mr. Mukesh Ambani, data usage increased to 240 crore GB per month from 125 crore.*
- *RIL has launched high-end variant of JioPhone, named JioPhone 2, featuring horizontal screen viewing and a QWERTY keypad. The phone is priced at Rs 2,999. JioPhone 2 will be available at Jio stores across India from August 15.*
- *Reliance has continued to be India's largest exporter accounting for 8.9 percent of India's total merchandise exports with a value of Rs 176,117 crore with access to markets in 113 countries.*
- *The company has paid Rs.42553 crore of GST*
- *Mr. Mukesh Ambani has announced Monsoon Hungama offer for JioPhone, users can exchange their existing feature phones for a new JioPhone at just Rs 500.*
- *On Reliance Retail, Reliance Trendz has continued to be the largest apparel seller in India, while Reliance Digital is the largest seller of electronics and digital products in the country.*
- *The company sees the maximum scope in creating a unique online-to-offline platform, adding to that Mukesh Ambani said, this will be done by combining the resources of Reliance Retail and Jio's digital infrastructure.*
- *7,500 Jio stores saw over 350 million footfalls this year.*
- *The company opened over 4,000 new stores within the Reliance Retail this year.*
- *The company wants to more than double income of farmers. On adding to this Mr. Mukesh Ambani said that Jio can usher a smart green revolution in India.*
- *Reliance Industries has stabilised the world's largest paraxylene complex and commissioned largest off-gas cracker complex.*
- *Reliance Industries is now the largest recycler of PET bottles in the country.*
- *The company is proposing a cross-border merger of RHUSA with Reliance.*
- *Mr. Mukesh Ambani said, that along with their partner BP, they will deploy various technologies to ensure that they start gas production from KG-D6 by 2020. The company aims to achieve production of 30-35 million cubic meters of per day by 2022.*
- *Reliance Foundation's rural transformation initiatives is focused on establishing strong market linkages for farmers and leveraging technology for better reach and impact. These initiatives have reach out to over 13,500 villages in 15 states.*
- *The Company's largest ever cycle of investment in hydrocarbon business is nearly complete.*
- *All these initiatives will enhance the capabilities and competencies, making the company future-ready.*
- *Jio will be present in every district, taluka and gram panchayat of India claimed Mukesh Ambani. He added that Jio can multiply capacity utilisation, which is currently at 20 percent, without additional investments.*

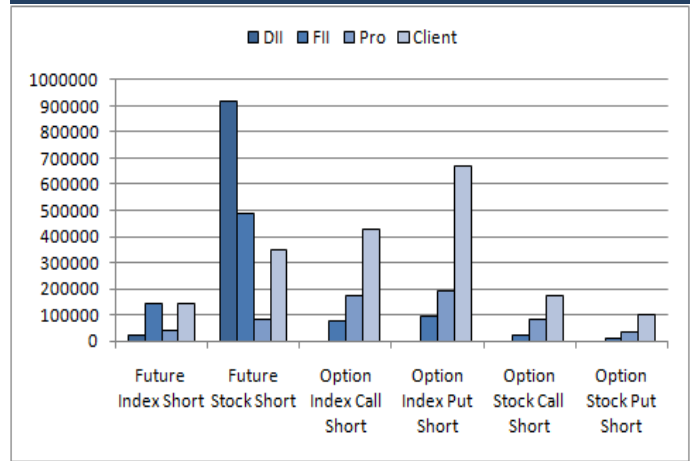
Bulk Deal						
Exchange	Deal Date	Company	Client Name	Deal Type	Quantity	Price
BSE	05-Jul-18	IBVENTURES	ORIENT GLOBAL CINNAMON CAPITAL LIMITED	S	13500000	478
BSE	05-Jul-18	IBVENTURES	JASMINE CAPITAL INVESTMENTS PTE LTD	B	13500000	478
BSE	05-Jul-18	ESHAMEDIA	STONERIDGE ADVISORS PVT LTD	S	749100	5
BSE	05-Jul-18	PARVATI	R.K. TANKERS PVT LTD.	S	735000	4
BSE	05-Jul-18	ESHAMEDIA	SHRIDHAR PARAMESHWARAN IYER	B	650200	5
BSE	05-Jul-18	PARVATI	AKRAM KHAN	S	461000	4
BSE	05-Jul-18	PARVATI	MUBARIK KHAN	S	401545	4
BSE	05-Jul-18	PARVATI	NINTH MILE RECREATION PVT LTD	S	400000	4
BSE	05-Jul-18	ESHAMEDIA	SHRIDHAR P IYER (HUF)	B	100000	5
BSE	05-Jul-18	TAHL	KIRAN BABULAL SHAH .	B	100000	39
BSE	05-Jul-18	SHIVAEXPO	RIKHAV SECURITIES LIMITED	S	70000	10
BSE	05-Jul-18	SYBLY	PRAVINABEN SAVJIBHAI MENPARA .	B	68500	14
BSE	05-Jul-18	SYBLY	SAVJIBHAI MANJIBHAI MENPARA .	B	58365	15
BSE	05-Jul-18	WAA	RAM BALLABH KATTA	S	55200	57
BSE	05-Jul-18	RELICAB	ROHITBHAI MAHENDRABHAI DESAI	S	51000	40
BSE	05-Jul-18	RELICAB	NOPEA CAPITAL SERVICES PRIVATE LIMITED	B	51000	40
BSE	05-Jul-18	OMNIAX	SAJANKUMAR RAMESHWARLAL BAJAJ	B	50000	2
BSE	05-Jul-18	BHARATAGRI	GIRDHAR TRANSPORT COMPANY	B	49027	149
BSE	05-Jul-18	BHARATAGRI	GIRDHAR TRANSPORT COMPANY	S	49026	150
BSE	05-Jul-18	KUBERJI	SYKES AND RAY EQUITIES (INDIA) LIMITED	S	33500	9
BSE	05-Jul-18	KUBERJI	ASHOK AMRATLAL SHAH	B	27200	9
BSE	05-Jul-18	COSBOARD	MADHU BANSAL	S	24943	25
BSE	05-Jul-18	COSBOARD	MADHU BANSAL	B	22000	27
BSE	05-Jul-18	KAPASHI	ROOPESH CHAITANYA PATEL	S	15000	76
BSE	05-Jul-18	SHIVAEXPO	RIKHAV SECURITIES LIMITED	B	10000	9
BSE	05-Jul-18	KUBERJI	SYKES AND RAY EQUITIES (INDIA) LIMITED	B	3500	9

F&O OPEN INTEREST (Number of Contracts)

LONG POSITION

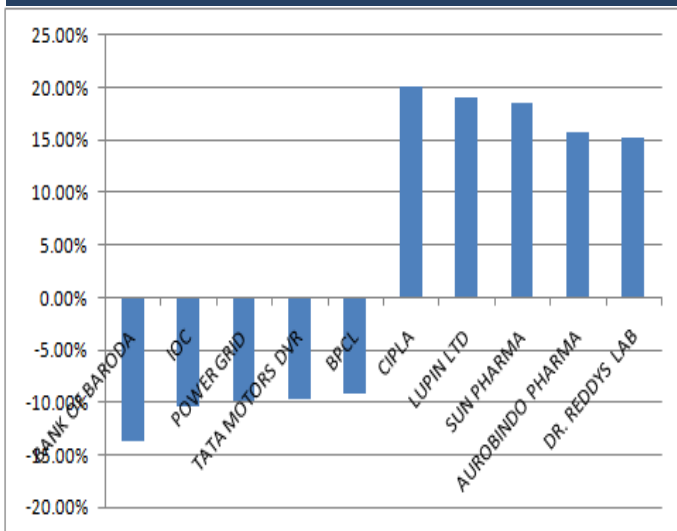


SHORT POSITION

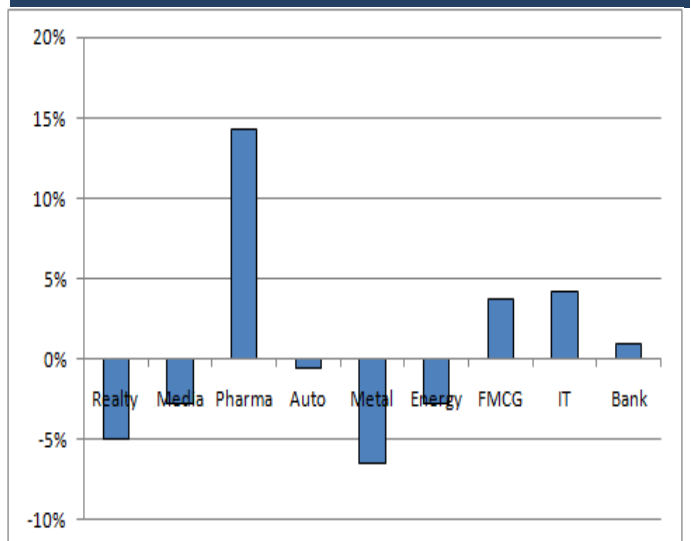


MARKET MOVERS (1 MONTH CHANGE)

Nifty Movers



NSE Sectoral Indices Performance



Result Calendar Q4FY18

BSE Code	Company Name	Date
531882	KWALITY	03-Jul-18
513303	MDRNSTL	03-Jul-18
517228	TRENDELEC	03-Jul-18
500945	VALUEIND	03-Jul-18
506087	ANUPMAL	04-Jul-18
531247	ALPHA	05-Jul-18
507488	GMBREW	05-Jul-18
532886	SELMCL	05-Jul-18
500399	STEELCO	05-Jul-18
511493	VCKCAP	06-Jul-18
524488	SVCIND	07-Jul-18

Economic Calendar

Country	Monday 2nd July 18	Tuesday 3rd July 18	Wednesday 4th July 18	Thursday 5th July 18	Friday 6th July 18
US	ISM Manufacturing PMI (Jun)	United States - Independence Day, Cap Goods Ship Non Defense Ex Air (MoM) ,Durable Goods Orders (MoM), Factory Orders (MoM) (May),API Weekly Crude Oil Stock	United States - Independence Day	ADP Nonfarm Employment Change (Jun),ISM Non-Manufacturing PMI (Jun),Crude Oil Inventories,FOMC Meeting Minutes.	Exports,Imports,Average Hourly Earnings (MoM) (Jun),Nonfarm Payrolls (Jun).Trade Balance (May),Unemployment Rate (Jun),U.S. Baker Hughes Oil Rig Count,CFTC Crude Oil speculative net positions,CFTC Gold speculative net positions
UK/EURO ZONE	Manufacturing PMI (Jun), Unemployment Rate (May),	Construction PMI (Jun), Retail Sales (MoM) (May),ECB's Praet Speaks	Markit Composite PMI (Jun),Services PMI (Jun),BoE Saporta Speaks	BoE Gov Carney Speaks,ECB's Mersch Speaks	Halifax House Price Index (YoY) (Jun)
INDIA					

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