



LAST SESSION DATA MATRIX

Index	Current	Change
NIFTY 50 Pre Open	10,732.35	18.05
NIFTY 50	10,657.30	-57.00
NIFTY NEXT 50	28,042.45	-249.25
NIFTY 100	10,929.85	-63.60
NIFTY 200	5,679.70	-33.50
NIFTY 500	9,109.00	-53.45
NIFTY MIDCAP 50	4,820.75	-29.95
INDIA VIX	13.45	0.51
S&P BSE SENSEX	35264.41	-159.07
S&P BSE SENSEX 50	11172.54	-51.64
S&P BSE 100	10932.79	-54.92
S&P BSE MidCap	15335.47	-115.43
S&P BSE SmallCap	15920.44	-111.71
S&P BSE 200	4585.16	-23.13
S&P BSE 500	14450.23	-78.31
S&P BSE AllCap	4151.53	-22.73
S&P BSE LargeCap	4138.64	-19.96
TURNOVER		
Product	No. of contracts	Turnover (cr.)*
Index Futures	2,08,971	18,725.30
Stock Futures	7,31,305	47,476.53
Index Options	47,31,748	4,63,126.67
Stock Options	4,88,176	33,473.18
F&O Total	61,60,200	5,62,801.68
GAINERS		
Symbol	LTP	% chng
INFY	1,337.80	2.34
ASIANPAINT	1,293.00	2.26
TITAN	894.25	1.79
UPL	624.4	0.9
BAJAJ-AUTO	2,833.00	0.81
LOSERS		
BHARTIARTL	368.5	-3.52
NTPC	154.05	-3.51
HINDALCO	222.55	-3.45
ADANI PORTS	362.5	-2.85
IBULHSGFIN	1,113.00	-2.58

FIRST LIGHT HEADINGS

-  **Sensex ends lower; financials, energy stocks drag**
-  **MBL Infrastructures Q4 net profit zooms 2085.73% at Rs 301.85 cr**
-  **Ashok Leyland sales rise 28% in June**
-  **Dr Reddy's recalls 2.36 lakh bottles of cholesterol lowering tablets from US**
-  **Niti Aayog, GNFC to use blockchain technology for subsidy payments**
-  **IVRCL posts Q4 net loss of Rs 1152.42 cr**

MARKET INSIGHT

 **On Jul 2** : Monday turned out to be a disappointing session of trade for Indian equity benchmarks where frontline gauges ended the session with a cut of around half a percent amid weak global cues. Domestic indices made a slightly positive start but soon erased gains as sentiments turned pessimistic with report of the Reserve Bank of India stating that India's external debt stood at \$529.7 billion at the end of March 2018, recording an increase of \$58.4 billion year-on-year, primarily on account of a rise in commercial borrowings, short-term debt and non-resident Indian (NRI) deposits. Market participants also remained worried on a report from Department of Industrial Policy and Promotion (DIPP) which highlighted that India's foreign direct investment (FDI) growth rate hit five-year low of 3% in 2017-18. According to the latest data of the Department of Industrial Policy and Promotion (DIPP) inflows grew by only 3% to \$44.85 billion in 2017-18. There was also caution among investors with reports that India's fiscal deficit has exceeded 55% of Budget estimate in first two months of Fy19.

 However, key indices gave up most of their losses in last leg of trade to come off their intraday low points, due to some buying witnessed in IT and TECK stocks. Traders also found some support with a private survey showing that India's manufacturing conditions improved in June at the strongest pace in 2018 so far, as favourable demand conditions led to greater output. The Nikkei India Manufacturing Purchasing Managers' Index, or PMI, rose to 53.1 in June from 51.2 in May. Some comfort came with a report that Indian economy is set for a surge and in the next decade, probably even by 2025, India is expected to double the size of the GDP to \$ 5 trillion. Traders failed to draw any sense of relief from a report that the revenue collections for May from the goods and services tax (GST) have come in at Rs 95,610 crore, of which Rs 31,645 crore will flow into central kitty and Rs 36,683 crore will go to the states. The collections for April were Rs 94,016 crore while the average for the last fiscal stood at just below Rs 90,000 crore. .

 On the global front, Asian markets ended in red, after surveys showed a deteriorating outlook for Chinese manufacturing ahead of higher tariffs expected to be imposed by Beijing and Washington starting Friday. In Japan, confidence among large manufacturers weakened for the second straight quarter in three months to June amid growing concerns about the potential impact of trade friction on the global economy. European markets were trading in red in early deals on Monday, as investors questioned the stability of the German government and wider trade links between the European Union and the U.S.

 Back home, select Pharma stocks ended higher amid report that Indian pharmaceutical market returned to double digit growth of 10.8 percent in May for the first time in over a year indicating the pangs of transitioning to the Goods and Service Tax (GST) regime have been left behind. Besides, auto stocks were also in limelight as companies report their sales number today.

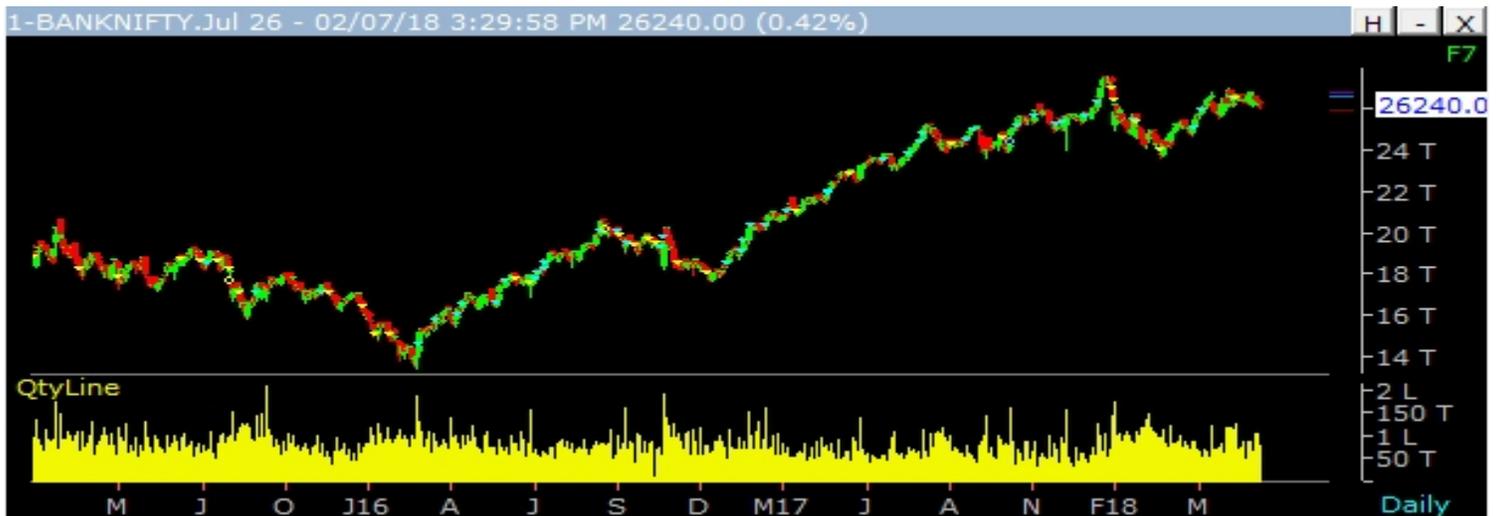
MARKET OUTLOOK- CAUTIOUSLY OPTIMISTIC



Quantitative Analysis : The BSE Sensex ended at 35273.25, down by 150.23 points or 0.42% after trading in a range of 35106.57 and 35578.24. There were 11 stocks advancing against 20 stocks declining on the index. The broader indices ended in red; the BSE Mid cap index was down by 0.80%, while Small cap index was down by 0.71%. The CNX Nifty is currently trading at 10659.45, down by 54.85 points or 0.51% after trading in a range of 10604.65 and 10736.15. There were 18 stocks advancing against 32 stocks declining on the index. The top gainers on Nifty were Infosys up by 2.45%, Asian Paints up by 2.31%, Titan Co up by 1.79%, Bajaj Auto up by 1.06% and UPL up by 0.96%. On the flip side, NTPC down by 3.85%, Bharti Airtel down by 3.64%, Hindalco down by 3.23%, Adani Ports & SEZ down by 2.71% and Indiabulls Housing Finance down by 2.49% were the top losers.

For upcoming sessions, 10900-950 could be the near term resistance zone however we believe domestic markets may continue its splendid performance in upcoming weeks. Any negative outcome from global or domestic markets may shatter this euphoria however at current juncture no such possibility is expected. On the down side 10000-10050 could provide important cushions.

Index	Support 2	Support 1	Previous Close	Resistance 1	Resistance 2	Trend
SENSEX	34276	34770	35264	35705	36146	Rangebound
NIFTY 50	10359	10508	10657	10790	10923	Rangebound
NIFTY BANK	25506	25873	26240	26568	26896	Rangebound





CORPORATE ACTIONS

Symbol	Face Value(Rs.)	Purpose	Ex-Date	Record Date
CENTENKA	10	Dividend- Rs 7 Per Share	2-Jul-18	-
SHRIPISTON	10	Dividend Rs 6/- Per Share	2-Jul-18	-
IOB	10	Annual General Meeting	2-Jul-18	-
SOUTHBANK	1	Annual General Meeting/Dividend Re 0.40 Per Share	3-Jul-18	-
RIIL	10	Dividend Rs 3.50 Per Share	3-Jul-18	4-Jul-18
SELAN	10	Annual General Meeting	3-Jul-18	-
21STCENMGM	10	Annual General Meeting/Dividend Rs 2.50/- Per Share	4-Jul-18	-
DABUR	1	Annual General Meeting/ Final Dividend- Rs 1.25 Per Share/ Special Dividend- Rs 5 Per Share	4-Jul-18	-
ICICIGI	10	Annual General Meeting/Dividend- Rs 2.50 Per Share	4-Jul-18	-
HAVELLS	1	Annual General Meeting/Dividend- Rs 4 Per Share	4-Jul-18	-
SUNDARMHLD	5	Annual General Meeting / Dividend- Rs 1.50 Per Share	4-Jul-18	-
INOXWIND	10	Annual General Meeting	4-Jul-18	-
MAYURUNIQ	5	Annual General Meeting/Dividend- Re 0.25 Per Share	4-Jul-18	-
SUNDARMFN	10	Annual General Meeting/Dividend- Rs 7 Per Share	4-Jul-18	-
HCC	1	Annual General Meeting	4-Jul-18	-
BAJAJ-AUTO	10	Annual General Meeting / Dividend- Rs 60 Per Share	5-Jul-18	-
BAJAJFINSV	5	Annual General Meeting / Dividend- Rs 1.75 Per Share	5-Jul-18	-
BAJAJHLDNG	10	Annual General Meeting / Dividend- Rs 40 Per Share	5-Jul-18	-
BAJAFINANCE	2	Annual General Meeting / Dividend- Rs 4 Per Share	5-Jul-18	-
CYIENT	5	Annual General Meeting/Dividend- Rs 4 Per Share	5-Jul-18	-
BANKBARODA	2	Annual General Meeting	5-Jul-18	-
TATASTEEL	10	Annual General Meeting / Dividend- Rs 10 Per Share	5-Jul-18	-
HITECH	10	Annual General Meeting/Dividend- Re 0.25 Per Share	5-Jul-18	-
KDDL	10	Annual General Meeting/Dividend- Rs 2.50 Per Share	5-Jul-18	-
KESORAMIND	10	Annual General Meeting	5-Jul-18	-
ORIENTPPR	1	Dividend- Re 0.60 Per Share	5-Jul-18	-
MAHSCOOPER	10	Annual General Meeting/Dividend- Rs 33 Per Share	5-Jul-18	-
BANKINDIA	10	Annual General Meeting	5-Jul-18	-
5PAISA	10	Annual General Meeting	6-Jul-18	-
CCL	2	Dividend- Rs 2.50 Per Share	6-Jul-18	-
AMJLAND	2	Annual General Meeting/Dividend- Rs 0.20 Per Share	6-Jul-18	-
VIPIND	2	Annual General Meeting / Dividend- Rs 2 Per Share	6-Jul-18	-
JSWSTEEL	1	Annual General Meeting / Dividend- Rs 3.20 Per Share	6-Jul-18	-
INDIANHUME	2	Annual General Meeting/Dividend- Rs 3.40 Per Share	6-Jul-18	-
PDMJEPAPER	1	Annual General Meeting/Dividend- Re 0.15 Per Share	6-Jul-18	-
HITECHCORP	10	Annual General Meeting / Dividend-Re 0.90 Per Share	6-Jul-18	-
ASHOKLEY	1	Dividend- Rs 2.43 Per Share	9-Jul-18	-
BALKRISIND	2	Annual General Meeting/Dividend- Rs 1.50 Per Share	9-Jul-18	-
BATAINDIA	5	Annual General Meeting/Dividend- Rs 4 Per Share	9-Jul-18	-
GOACARBON	10	Annual General Meeting/Dividend- Rs 10 Per Share	9-Jul-18	-
ZEEL	1	Annual General Meeting / Dividend- Rs 2.90 Per Share	9-Jul-18	10-Jul-18
MINDTREE	10	Annual General Meeting/Dividend- Rs 3 Per Share	9-Jul-18	-
NELCO	10	Annual General Meeting	9-Jul-18	-
LUMAXIND	10	Dividend- Rs 23 Per Share	9-Jul-18	-

Data Source-Ace Equity, NSE,BSE

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