



LAST SESSION DATA MATRIX

Index	Current	Change
NIFTY 50 Pre Open	10,754.70	-103.55
NIFTY 50	10,599.25	-259.00
NIFTY NEXT 50	26,539.15	-420.20
NIFTY 100	10,794.30	-251.50
NIFTY 200	5,567.45	-128.20
NIFTY 500	8,854.85	-201.85
NIFTY MIDCAP 50	4,553.30	-97.15
INDIA VIX	19.5775	1.46
S&P BSE SENSEX	35169.16	-806.47
S&P BSE SENSEX 50	11084.73	-272.04
S&P BSE 100	10819.08	-257.09
S&P BSE MidCap	14392.53	-283.95
S&P BSE SmallCap	14126.16	-298.25
S&P BSE 200	4501.09	-102.65
S&P BSE 500	14047.35	-318.08
S&P BSE AllCap	4020.81	-90.39
S&P BSE LargeCap	4097.94	-94.86

TURNOVER

Product	No. of contracts	Turnover (cr.)*
Index Futures	4,44,502	38,789.06
Stock Futures	10,45,537	67,319.15
Index Options	1,92,74,688	18,74,484.87
Stock Options	6,22,776	45,661.34
F&O Total	2,13,87,503	20,26,254.41







GAINERS

Symbol	LTP	% chng
ICICIBANK	316	4.05
INFRATEL	258.1	2.54
ULTRACEMCO	3,940.00	2.06
AXISBANK	583.85	2.03
LT	1,256.00	0.85


LOSERS


HINDPETRO	194.8	-22.44
BPCL	306.5	-18.88
IOC	129.5	-18.24
ONGC	163.35	-9.98
RELIANCE	1,108.50	-8.02


FIRST LIGHT HEADINGS


-  Sensex, Nifty slump over 2 percent, energy stocks top losers
-  Surge in U.S. yields drives emerging markets into a tailspin
-  L&T Hydrocarbon Engineering consortium bags contract from ONGC
-  Chanda Kochhar quits as ICICI Bank CEO, Sandeep Bakhshi to replace her
-  Apollo Tyres board to seek shareholders' guidance for MD salary
-  JB Chemicals buyback offer to open on Oct 10

MARKET INSIGHT

 **On Oct 04** : Indian equity benchmarks witnessed a bloodbath for second straight session and ended with losses of more than two percent, as a steady decline in the domestic currency and concerns that the central bank would raise the policy interest rate soured investor sentiments. Both the S&P BSE Sensex and the NSE Nifty 50 settled below crucial 35,150 and 11,000 levels, respectively. Markets opened with heavy losses, following weak Asian peers. Traders remained cautious with Exporters' body Federation of Indian Export Organisations' (FIEO) statement that the growth of country's exports is likely to slow in the coming months owing to various domestic and global factors. It said Indian exports have always been influenced by the growth in global trade and therefore, the subdued global trade forecast of 3.9% in 2018 and 3.7% in 2019 will have adverse bearing on export.

 Key indices continued its free fall during the final hour of trade, as traders reacted negatively to a private report stating that new investment announcements have declined in the July-September period for the second quarter in a row. As per the report, private and public sector companies together announced new projects worth Rs 1.49 trillion in the quarter which ended in September, 41% lower than the preceding quarter. On a year-on-year basis, the decline was less pronounced at 12%. Adding to the pain, Nitin Gadkari said that India is facing an economic crisis due to its huge oil imports. Investors failed to draw any sense of relief with Finance Ministry indicating that gross direct tax collection in the first six months of the financial year grew 16.7 per cent to Rs 5.47 lakh crore. The broader indices were too capitulating to selling pressure with heavy losses of around 2%.

 On domestic front, the FIEO President said flow of credit to the export sector is a huge issue as export credit declined by over 41% in April-June. He said such mismatch does not augur well for exports and thus needs to be addressed immediately and effectively and the GST refund pendency should be resolved immediately. However, he expressed optimism that the country's exports would touch \$350 billion exports in 2018-19. Last time in March, exports entered negative zone. It dipped by 0.66% in that month. Besides, exports were up by 16.13% to \$136.10 billion in April-August 2018-19.

 Asian markets ended lower on Thursday, after a spike in US treasury yields overnight spooked investors. European markets were trading in red, led lower by defensive stocks. Back home, Shares of state-run oil marketing companies such as HPCL, BPCL and IOC ended with heavy losses after Finance Minister Arun Jaitley said the government cut excise duty on petrol & diesel by Rs 1.50 per litre. Besides, Cement stocks fell despite Icria in its report stating that Cement production is expected to grow at 6-7 percent in the current fiscal year, driven by pick-up in affordable and rural housing segments and infrastructure.

MARKET OUTLOOK- CAUTIOUSLY OPTIMISTIC



Quantitative Analysis : The BSE Sensex ended at 35127.70, down by 847.93 points or 2.36% after trading in a range of 35063.13 and 35820.53. There were 6 stocks advancing against 25 stocks declining on the index. The broader indices were trading in red; the BSE Mid cap index dipped 2.11%, while Small cap index was down by 2.20%. The CNX Nifty ended at 10575.80, down by 282.45 points or 2.60% after trading in a range of 10568.15 and 10754.70. There were 11 stocks advancing against 39 stocks declining on the index. The top gainers on Nifty were ICICI Bank up by 3.77%, Ultratech Cement up by 2.54%, Axis Bank up by 2.11%, Bharti Infratel up by 1.75% and Larsen & Toubro up by 0.92%. On the flip side, HPCL down by 14.97%, BPCL down by 13.91%, Indian Oil Corp. down by 13.19%, Reliance Industries down by 7.41% and Eicher Motors down by 6.61% were the top losers.

For the upcoming sessions we believe dollar and crude continue to remain in upward trajectory . Hence we expect some more downside in domestic indices near to 10200-250 however probability of bounce back near to 11000-11050 will never be ruled out

Index	Support 2	Support 1	Previous Close	Resistance 1	Resistance 2	Trend
SENSEX	34185	34677	35169	35609	36049	Rangebound
NIFTY 50	10303	10451	10599	10731	10863	Rangebound
NIFTY BANK	24045	24391	24737	25046	25355	Rangebound



CORPORATE ACTIONS

Symbol	Face Value(Rs.)	Purpose	Ex-Date	Record Date
CUPID	10	Bonus 1:5	11-Oct-18	12-Oct-18
ATLASCYCLE	5	Annual General Meeting	17-Oct-18	-
IEX	10	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Re 1/- Per Share	19-Oct-18	22-Oct-18
VASWANI	10	Annual General Meeting	19-Oct-18	-
ICICIGI	10	Interim Dividend	29-Oct-18	30-Oct-18
DABUR	1	Interim Dividend	9-Nov-18	12-Nov-18

Data Source-Ace Equity, NSE,BSE

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