

**Bloomberg Page: SCSM**

Indices	Prvcls	1D(%)	1M(%)	3M(%)	1Y(%)
Sensex	35575	-0.2	1.1	5.8	13.4
Nifty	10750	-0.2	0.6	4.0	11.1
Dow Jones	24357	0.8	-3.1	1.8	14.2
S&P 500	2737	0.9	-1.3	5.1	13.6
Nadaq	7586	1.1	-1.3	9.7	24.6
FTSE	7603	0.4	-1.4	5.8	3.6
Nikkei	21547	0.7	-4.1	0.6	8.5
HangSeng	28182	-0.4	-10.2	-6.0	10.2
Shanghai	2734	-0.7	-12.9	-13.3	-15.5
Russia	1172	2.1	-0.5	-5.2	15.8
Brazil	74553	-0.3	-2.1	-12.1	19.3

Sectoral	Prvcls	1D(%)	1M(%)	3M(%)	1Y(%)
Mid-cap	15306	-0.7	-2.7	-7.8	2.4
Small-Cap	15986	-0.4	-2.9	-10.6	1.2
Auto	24364	0.2	-1.9	-4.1	2.1
Healthcare	14152	-1.2	10.1	3.4	-0.6
FMCG	11381	1.0	2.1	7.9	6.1
IT	13882	-1.6	4.3	13.5	40.8
PSU	7166	-0.3	-7.6	-10.8	-13.2
Bankex	29368	0.1	-0.3	5.4	10.6
Oil & Gas	13597	-0.5	-5.5	-8.3	1.2
Metal	12611	-1.4	-8.1	-7.5	7.1
CG	17324	-0.6	-5.6	-7.9	0.4
Realty	2026	-1.7	-5.7	-11.7	-4.6

₹/ US \$	05-July	1D(%)	1MFwd	3MFwd	1Yfwd
Spot	68.94	-0.29	0.36%	1.10%	4.34%

F&O Statistics	05-July	04-July
Open Interest Index (Cr.)	29832	29909
Open Interest Stock (Cr.)	120154	120860
Nifty Implied Volatility	11%	11%
Nifty Put Call Ratio (OI)	1.42	1.46
Resistance (Nifty Fut.)	10830	10830
Support (Nifty Fut.)1	10700	10700
Resistance (Sensex)	35850	35850
Support (Sensex)	35450	35450

Turnover Data, ₹Cr.	05-July	04-July
BSE (Cash)	2883	2890
NSE (Cash)	26064	25100
F & O (NSE)	15181	8721
Total T/O (NSE)	41245	33821
Adv./ Decl. (NSE)	688/1110	835/942

₹Cr	Buy	Sell	Net
MF (04-July)	3909	1556	2353
FII cash (04-July)	5212	4138	1074
DII Prov. (05-July)	3387	3684	-297
FII Prov. (05-July)	3870	4030	-160
FII F&O (05-July)	140415	138643	1772

GDR /ADR (USD)	Price	% Chg	Prem/Disc
Reliance	27.9	-2.1	0%
SBI	37.2	0.3	400%
ICICI Bank	8.0	-0.5	1%
Infosys	19.3	-1.8	4%
Wipro	4.9	2.5	27%
Dr Reddy's Lab	32.9	0.6	-1%
Tata Motors	19.3	-1.7	2%

	Close	Prev.Cl
CPI YoY (%)	4.9	4.6
10 Year G-Sec	7.9	7.9
Nymex (USD/barrel)	72.9	74.1

**Global News**

- U.S. stocks closed solidly higher on Thursday, with major indexes advancing in a broad rally that was led by the technology sector, which enjoyed its best session in more than a month. Hopes that geopolitical tensions surrounding trade policy were easing also supported the market. The centrality of this issue to the economy was underlined after minutes from the Federal Reserve's most recent gathering acknowledged intensifying risks from trade policies emanating from the Trump administration. The Dow Jones Industrial Average gained 181.92 points, or 0.8%, to 24,356.74. The S&P 500 added 23.39 points to 2,736.61, a gain of 0.9%. The Nasdaq Composite Index rose 83.75 points, or 1.2%, to 7,586.43. The day's gains were widespread, with 28 of the 30 Dow components ending in positive territory, along with 10 of the 11 primary S&P 500 sectors. Technology stocks climbed 1.5% in their biggest one-day percentage gain since June 1, while the health-care, consumer-staples, real estate, and materials sectors all rose 1% or more. Energy was the only declining group, dropping less than 0.2%. Asian stock markets closed mostly lower, with the tech-heavy China Shenzhen ChiNext Composite tumbling 2.2%. Equities in Europe traded higher, with the Stoxx Europe 600 index gaining 0.4%. The ICE Dollar Index declined 0.2% to 94.451, while gold prices settled higher at \$1,258.80 an ounce. Crude-oil prices fell 1% to \$73.42 a barrel. (Dow Jones Newswires)
- Trump says U.S. tariffs could be applied to Chinese goods worth \$500 billion** : US President Donald Trump said on Thursday the United States may ultimately impose tariffs on more than a half-trillion dollars' worth of Chinese goods as the world's two largest economies hurtled toward the start of a trade war. Trump confirmed that the United States would begin collecting tariffs on \$34 billion in Chinese goods at 12:01 a.m. Washington D.C. time (0401 GMT) on Friday and warned that subsequent rounds could see tariffs on more than \$500 billion of goods, or roughly the total amount that the United States imported from China last year. "You have another 16 (billion dollars) in two weeks, and then, as you know, we have \$200 billion in abeyance and then after the \$200 billion, we have \$300 billion in abeyance. Ok? So we have 50 plus 200 plus almost 300," Trump told reporters aboard Air Force One. (Reuters)
- Fed policy makers saw negative risks from U.S. trade policy, saying it "had intensified," indicating that a tit-for-tat tariff clash could have negative effects on business sentiment and investment spending, according to the minutes of the June 12-13 Federal Open Market Committee released Thursday. Despite the headwinds from trade clashes, the Fed said there was broad support for continued "gradual" rate increases. Officials noted that the benchmark federal-funds rate could be at or above its "neutral" level "sometime next year." (Dow Jones Newswires)

**Corporate News**

- MEP Infrastructure** announced that its four Special Purpose Vehicles (SPVs) have signed concession agreements worth ₹4,100 crore with the National Highways Authority of India (NHAI). The concession period is fixed at 15 years (excluding the 2-year construction period).
- Parag Milk Foods (PMFL)** said that it is collaborating with Swedish research organisation ColoPlus AB to launch a colostrum-based nutrition product in India. Under this collaboration, PMFL will manufacture colostrum-based health food product GO Colo Power by acquiring the patent rights for this technology from the Swedish company.(BL)
- Apollo Hospitals Enterprise Ltd** has acquired a 50% stake in Medics International Lifesciences Ltd, a 330-bed super-speciality hospital in Lucknow, for ₹91 crore. The acquisition is through a primary issuance of shares by Medics for ₹91 crore to be utilised for hospital commissioning and related expenses.(BL)
- DCM Shriram Industries** has received a licence from the government for manufacturing about 3,500 unmanned aerial vehicles (UAVs), bullet proof vehicles and other products, annually. the company informed that it has got the 'industrial licence' for the life-time from the Arms Licence Authority under the Department of Industrial Policy and Promotion (DIPP).(BS)



- **Tata projects Limited** said its 'Smart Cities Business Unit' has been awarded Bharat Net project worth Rs 30.57 billion in Chhattisgarh. The project involves laying of Optical Fibre Network that follows ring architecture with Internet Protocol - Multi Protocol Label Switching (IP-MPLS) technology.(BS)
- **Zydus Cadila** has inked an agreement with the Council of Scientific and Industrial Research (CSIR) - Institute of Microbial Technology - to identify new drug candidates for treatment of drug resistant infections.(BL)
- **Berger Paints** has signed a shareholder agreement with Rock Paint Co of Japan for setting up a joint venture company in India - Berger Rock Paints Pvt Ltd or any other name as may be approved by the Registrar of Companies. The JV will be engaged in developing, producing and selling superior automotive refinish paints in India and Nepal. Berger Paints will hold 51 per cent in the joint venture.(BL)
- **Ceat** has signed an agreement with the Tamil Nadu government for establishing a tyre manufacturing facility near Chennai at an investment of ₹4,000 crore. (BL)



Mkt. Movers (₹)	Close	PtChg	% Chg
<b>Top Gainers (BSE200)</b>			
NAUKRI	1222.3	55.5	4.8
DALMIABHA	2337.0	95.9	4.3
CESC	915.0	37.3	4.2
YESBANK	348.8	13.3	4.0
MOTILALOFS	871.0	31.4	3.7
<b>Top loser (BSE200)</b>			
IDBI	48.2	-3.6	-7.0
SHRIRAMCIT	1939.1	-135.2	-6.5
TITAN	837.9	-49.5	-5.6
VAKRANGEE	54.6	-2.9	-5.0
INFY	1284.5	-60.1	-4.5

Mkt. Buzzers (₹)	Close	PtChg	% Chg
<b>Top Gainers</b>			
BHARATAGRI	150.0	18.1	13.7
SPENTA	135.6	15.4	12.8
PTIL	147.3	15.1	11.4
RASOI	32111.0	3111.0	10.7
GOPALA	130.0	12.1	10.2
<b>Top Losers</b>			
SHREEGANES	346.1	-54.0	-13.5
TINNARUBR	52.0	-4.5	-8.0
TANVI	55.0	-4.8	-8.0
VANTABIO	66.0	-5.4	-7.5
ITDC	380.7	-30.4	-7.4

Comdty Prices	Cls	1D(%)	1M(%)	3M(%)	1Y(%)
Gold (₹/10gm)	30650	0.1	-1.3	-0.2	--
Silver (₹/Kg)	39881	-0.1	-1.3	1.7	--
Copper (\$/MT)	6345	-0.6	-10.6	-6.9	8.6
Alum (\$/MT)	2080	-0.4	-10.0	3.5	7.8
Zinc (\$/MT)	2700	0.0	-15.6	-16.6	-2.9
Nickel (\$/MT)	14195	0.4	-9.9	6.5	55.0
Lead (\$/MT)	2355	1.4	-6.4	-1.1	3.5
Tin (\$/MT)	19425	-0.9	-5.9	-7.7	-1.3
Crude(\$/Bbl)	72.94	-0.2	12.5	18.1	52.2
N.Gas (\$)	2.837	-0.2	-2.6	0.2	0.4

Currencies	Cls	1D(%)	1M(%)	3M(%)	1Y(%)
EUR-USD	1.17	0.3	-0.7	-4.8	2.3
USD-JPY	110.64	0.1	-0.5	-3.4	2.3
GBP-USD	1.32	-0.1	-1.5	-6.2	1.9
USD- Aud	0.74	0.0	-3.7	-3.9	-2.7
USD-CAD	1.31	-0.1	-1.5	-2.8	-1.3
USD-INR	68.94	-0.3	-2.6	-5.8	-6.0

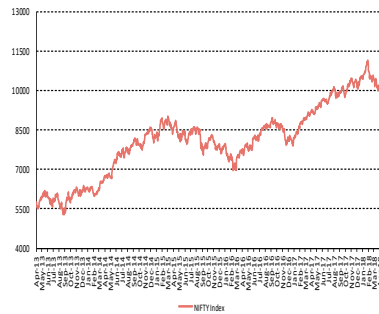
Shipping Index	Cls	1D(%)	1M(%)	3M(%)	1Y(%)
Baltic Dry	1567	6.2	16.9	65.3	89.0
Baltic CapeSize	3013	9.8	44.3	265.7	268.3
Baltic Panamax	1339	0.4	3.8	1.7	26.0

Valuation Snapshot

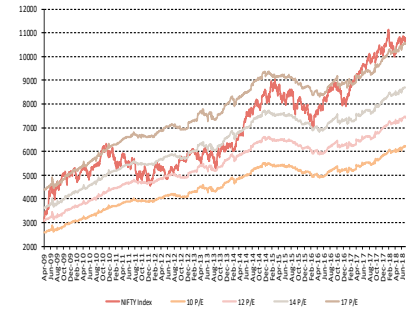
Indices	P/E		P/BV	EV/EBITDA	ROE
	FY19E	FY20E	FY19E	FY19E	FY19E
Nifty	18.2	15.1	2.7	10.9	14.2
Sensex	18.6	15.3	2.7	10.9	14.0
CNX 500	18.7	15.3	2.6	11.9	13.1
CNX Midcap	21.6	16.7	2.6	14.5	6.2
BSE Small cap	21.2	16.9	2.7	15.0	7.5
BSE 200	18.9	15.5	2.6	11.9	13.3
Bank Nifty	24.5	16.1	2.5	--	8.1
NSE CNX IT	17.8	16.0	3.9	12.3	22.8
CNX Pharma	24.5	19.9	3.0	16.0	11.8
CNX Infra	20.6	16.4	1.9	10.7	8.2
CNX FMCG	37.0	32.5	9.3	24.5	24.1

Source: Bloomberg

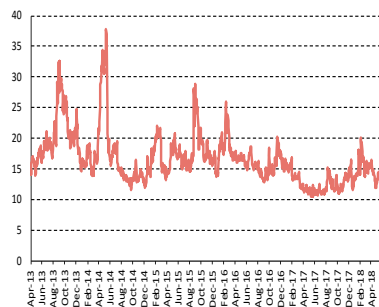
Nifty



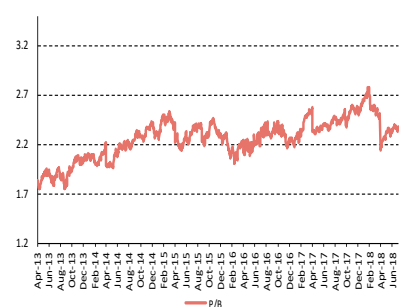
Nifty-One year forward P/E



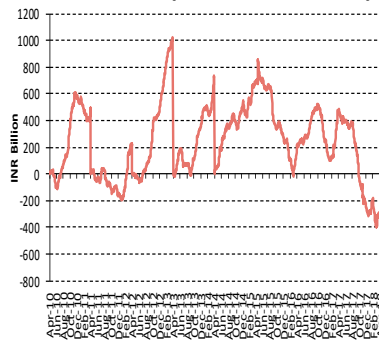
INDIA VIX



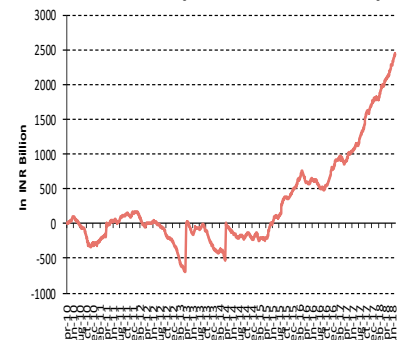
Nifty-One year forward P/BV



FII Provisional (Cumulative FYTD)



DII Provisional (Cumulative FYTD)



Source: Bloomberg



### Technical

NSE NIFTY [N59901] 10786.05,10786.05,10726.25,10753.75, 1134869248 -0.15%  
Price



- Nifty index closed flat in yesterday's session.
- The index has taken a breather after rallying 230 points in the last 6 sessions.
- The index has resistance at 10830.
- On the downside, the index has support at 10700.
- 20-dma : 10755; 50-dma : 10703 ; 100-dma : 10535 ; 200-dma : 10452
  
- Nifty fut. : Resistance : 10830 ; Support : 10700
- Sensex : Resistance : 35850 ; Support : 35450



**Detailed Report Links**

- Bulk Deals - [http://www.sunidhi.com/ResearchReports/522548911\\_Bulkdeals-05.07.18.pdf](http://www.sunidhi.com/ResearchReports/522548911_Bulkdeals-05.07.18.pdf)
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Member: National Stock Exchange (Capital, F&O & Debt Market) & The Stock Exchange, Mumbai

SEBI Registration Numbers: INZ000169235

Kalpataru Inspire, Unit 1, 8th Floor, Opp. Grand Hyatt Hotel, Santacruz (East), Mumbai 400 055

Tel: (+91-22) 6677 1777 Web-site: <http://www.sunidhi.com>