



Index	Previous Close	Open	High	Low	Close	Change	Change%
Sensex	35,884.41	35,694.25	35,707.23	35,266.76	35,312.13	-572.28	-1.59
Nifty	10,782.90	10,718.15	10,722.65	10,588.25	10,601.15	-181.75	-1.69

## Markets make a catastrophic move

The 30-share BSE Sensex was down 572.28 points or 1.59% to settle at 35,312.13 and the Nifty was down 181.75 points or 1.69% to settle at 10,601.15. The BSE Mid-Cap lost 1.54%. The BSE Small-Cap index lost 1.36%. Indian Bourses BSE Sensex and NSE's Nifty 50 ended deep in red on Thursday, marking their worst closing levels in two weeks amid weak cues from global equity markets. Investors were also cautious ahead of the assembly election results, which might set tone for the 2019 general elections. Stocks in Europe and Asian fell along with US futures after Canada arrested Huawei Technologies CFO for extradition to the US, raising fears of a fresh flashpoint in tensions between the US and China. Oil prices dipped as traders eyed an OPEC meeting expected to result in a supply cut. On the Sectoral front there was no major gaining indices on BSE while on the flip side Auto, Metal, Bank, FMCG, Realty and Capital Goods were major losing indices on BSE. The top gainer on the Sensex was Sun Pharma while on the flip side; Maruti Suzuki, Tata Motors, Yes Bank, Adani Ports and Reliance were the top losers. On global Front; Asian markets shut the day on a red note and European indices were trading red.

The market breadth indicating the overall health of the market was negative. On BSE 740 shares rose and 1809 shares fell. A total of 148 shares were unchanged.

BSE Sector	Current	Last	% Change
<b>Realty Sector</b>			
DLF	167.55	176.55	-5.10
DBREALTY	23.50	24.50	-4.08
PRESTIGE	199.85	207.45	-3.66
IBREALEST	77.30	79.95	-3.31
MAHLIFE	375.75	388.30	-3.23
ANANTRAJ	34.15	35.15	-2.84
SOBHA	442.95	453.25	-2.27

### Comment

The S&P Realty Index ended at 1,775.99 down by 41.02 points or by 2.26%. DLF, DB Realty, Prestige and IB Real Estate were among the major losers.

### Most active (by value)

Rs. Cr (NSE)

Name	Qty	Pr.	Vol.
SUNPHARMA	5,60,87,131	417.55	2369.68
MARUTI	13,39,030	7201.00	974.52
HDFC	42,78,616	1941.00	838.66
RELIANCE	58,66,108	1119.05	666.48
TATASTEEL	1,29,66,714	510.70	663.54

### Most active (by Qty)

Rs. Cr (NSE)

Name	Qty	Pr.	Vol.
RCOM	13,77,74,119	16.35	218.23
SUNPHARMA	5,60,87,131	417.55	2369.68
VAKRANGEE	3,96,08,925	39.05	150.23
YESBANK	3,88,67,660	168.35	659.89
GMRINFRA	2,85,91,828	15.20	43.91

### Top gainers

(NSE)

Name	Closing Price	Previous Price	%change
SUNPHARMA	417.55	412.95	1.11
JSWSTEEL	306.00	304.35	0.54
GAIL	350.00	349.35	0.19
POWERGRID	183.55	183.50	0.03

### Top losers

(NSE)

Name	Closing Price	Previous Price	%change
IBULHSGFIN	730.00	776.35	-5.97
MARUTI	7201.00	7554.05	-4.67
BAJAJFINSV	5641.00	5902.50	-4.43
TECHM	695.00	726.85	-4.38
TATAMOTORS	162.50	169.20	-3.96

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
<b><u>Auto Sector</u></b>			
MARUTI	7209.70	7559.55	-4.63
ESCORTS	631.50	659.75	-4.28
TVSMOTOR	531.60	554.75	-4.17
TATAMOTORS	162.40	169.20	-4.02
EICHERMOT	22295.05	22823.60	-2.32
ASHOKLEY	101.90	103.65	-1.69
BAJAJ-AUTO	2719.05	2761.90	-1.55

### *Comment*

The S&P Auto Index ended at 19,824.18 down by 457.98 points or by 2.26%. Maruti, Escorts, TVS Motors and Tata Motors were among the top losers.

### *Other Corporate News:*

- **Eveready Industries India Ltd** has signed an agreement with Alwarpet Properties Pvt Ltd for sale of its land situated Triuvottiyur Road, in Chennai, Tamil Nadu, for a consideration of Rs 100 crores. The sale is expected to be completed within 4 -10 months.
- **Muthoot Finance Ltd** reported a profit of Rs 484 crore in the quarter ended September 30 versus Rs 446 crore a year ago. Total revenue from operations fell marginally to Rs 1,650 crore in the September 2018 quarter from Rs 1,662 crore in the same period last year. Muthoot Finance shares fell as much as 9.98%
- **Mindtree** surged 4.6% in the morning trade as Mindtree Ltd's largest investor and Café Coffee Day's (CCD) founder V.G. Siddhartha, two firms controlled by him and a few other large shareholders are looking to sell their stakes . Private equity firm KKR and Co. has evinced interest in buying a large stake in Mindtree.
- **Lemon Tree Hotels Ltd** rose 2.6% after the company opened a 201-room hotel property in Pune.
- **Info Edge (India) Ltd** signed an agreement to invest about Rs 13.40 crore in Shop Kirana E Trading Private Ltd.
- The Cabinet will Thursday consider the proposal for **PFC** acquiring entire government holding in state-owned **REC**, which will fetch the government around ₹15,000 crore. The government held 57.99% in REC, and 65.64% in PFC at September-end. However, government holding in REC has come down to 52.63% following stake sale through ETF.
- **Aurobindo Pharma** shares fall 4% as the company faces a class action lawsuit in the U.S. over carcinogenic elements in its blood pressure drug. The drugmaker has been named in the lawsuit for alleged contamination of its irbesartan active ingredient (API) used in treatment of high blood pressure.
- Shares of **metal companies** declined as prices of non-ferrous metals extended losses, as worries over weak demand caused by Sino-US trade tensions persisted. The Nifty Metal Index was down nearly 2%. JSW Steel, Tata Steel, Vedanta and Jindal Steel were major losers.

HEM SECURITIES LIMITED

MEMBER-BSE,CDSL, SEBI REGISTERED CATEGORY I MERCHANT BANKER

Sebi Registration No For Research Analyst: INH100002250

MUMBAI OFFICE: 904, A WING, 9 FLOOR, NAMAN MIDTOWN, SENAPATI BAPAT MARG,  
PRABHADEVI STATION, LOWER PAREL, MUMBAI-400 013 PHONE- +912249060000

JAIPUR OFFICE: 203-204, JAIPUR TOWERS, M I ROAD, JAIPUR-302001  
PHONE- 0091 1414051000

GROUP COMPANIES

HEM FINLEASE PRIVATE LIMITED  
MEMBER-NSE  
HEM MULTI COMMODITIES PRIVATE LIMITED  
MEMBER-NCDEX, MCX  
HEM FINANCIAL SERVICES LIMITED  
NBFC REGISTERED WITH RBI

***Disclaimer & Disclosure:*** This document is prepared for our clients only, on the basis of publicly available information and other sources believed to be reliable. Whilst we are not soliciting any action based on this information, all care has been taken to ensure that the facts are accurate, fair and reasonable. This information is not intended as an offer or solicitation for the purchase or sell of any financial instrument and at any point should not be considered as an investment advise. Reader is requested to rely on his own decision and may take independent professional advise before investing. Hem Securities Limited, Hem Finlease Private Limited, Hem Multi Commodities Pvt. Limited, Directors and any of its employees shall not be responsible for the content. The person accessing this information specifically agrees to exempt Hem Securities Limited, Hem Finlease Private Limited, Hem Multi Commodities Pvt. Limited or any of its affiliates or employees from, any and all responsibility/liability arising from such misuse and further agrees to hold Hem Securities Limited, Hem Finlease Private Limited, Hem Multi Commodities Pvt. Limited or any of its affiliates or employees free and harmless from all losses, costs, damages, expenses that may be suffered by the person accessing this information due to any errors and delays. The companies and its affiliates, officers, directors, and employees, including persons involved in the preparation or issuance of this material may from time to time, have long or short positions in, and buy or sell the securities there of, company (ies) mentioned here in and the same have acted upon or used the information prior to, or immediately following the publication.

***Analyst Certification***

*The views expressed in this research report accurately reflect the personal views of the analyst(s) about the subject securities or issues, and no part of the compensation of the research analyst(s) was, is, or will be directly or indirectly related to the specific recommendations and views expressed by research analyst(s) in this report.*