



HEM SECURITIES
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END DAY COMMENTARY

9th January 2019

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Indian bourses gained after a rollercoaster ride

The 30-share BSE Sensex was up 231.98 points or 0.64% to settle at 36212.91 and the Nifty was up 53.00 points or 0.49% to settle at 10855.15. The BSE Mid-Cap lost 0.04%. The BSE Small-Cap lost 0.17%. On the Sectoral front FMCG, Information Technology, Auto, Bank and Healthcare were major gaining index on BSE while on the flip side Oil & Gas and Metal were major losing indices on BSE. The top gainers on the Sensex were Axis Bank, ITC, Tata Motors, Bharti Airtel and HDFC while on the flip side; Yes Bank, Tata Steel, Hero Motocorp, ONGC and Bajaj Finance were the top losers. On global Front; Asian markets shut the day on a green note and European indices were trading in green.

Index	Previous Close	Open	High	Low	Close	Change	Change%
Sensex	35,980.93	36,181.37	36,250.54	35,863.29	36,212.91	+231.98	+0.64
Nifty	10,802.15	10,862.40	10,870.40	10,749.40	10,855.15	+53.00	+0.49

Benchmark indices closed in green after a highly volatile day of trade. Key indices remained upbeat for the most part of the session. However, in last hour of trade markets witnessed volatility by reversing all of their gains to enter into red terrain for brief period of time, as sentiments got hurt with a private reports stating that the battered Indian rupee will take another bruising this year, despite a recent revival, weighed down by uncertainty around national elections in May and an expected economic slowdown. However, last leg of the trade was a game changer as indices gave away all their earlier losses to end near day's high.

Moreover, positive cues from global markets and continued buying by local investors also boosted sentiment. Investors turned their focus to December-quarter earnings, with IT majors TCS and Infosys reporting their results later this week.

NEWS BULLETIN

- IndusInd Bank reported a 4.6% rise in its December-quarter net profit due to higher provisions and contingencies. Net profit for the quarter stood at Rs 985.03 crore against Rs 936.25 crore a year ago.
- Tera Software Ltd has bagged a work order worth Rs 324.89 crore from Andhra Pradesh State Fiber Net Limited to establish optical fibre grid network in 3394 Gram Panchayats in the state.
- NMDC Ltd approved the proposal to buyback of upto 102,040,815 equity shares, representing 3.23% of the total shares, at a price of Rs 98 per share for an aggregate consideration of Rs 1,000 crore.

BSE Sector	Current	Last	% Change
FMCG SECTOR			
ITC	290.70	284.20	+2.29
NESTLEIND	11252.20	11016.80	+2.14
DABUR	421.05	417.50	+0.85
HINDUNILVR	1783.20	1770.60	+0.71
MARICO	383.95	382.35	+0.42
BRITANNIA	3094.90	3093.00	+0.06
COLPAL	1303.80	1308.90	-0.39

Comment

The S&P FMCG Index ended at 11,886.61 up by 130.73 points or by 1.10%. ITC, Nestle Industries, Dabur and Hindustan Unilever were among the major gainers.

Most active (by Value)

Rs. Cr (NSE)

Name	Quantity	Price	Volume
INFY	1,81,30,292	675.60	1229.95
YESBANK	6,36,73,200	186.55	1201.06
AXISBANK	1,80,03,387	671.20	1195.06
INDUSINDBK	64,47,772	1599.70	1016.19
ICICIBANK	2,17,30,142	382.25	827.83

Most active (by Volume)

Rs. Cr (NSE)

Name	Quantity	Price	Volume
YESBANK	6,36,73,200	186.55	1201.06
RCOM	5,81,66,357	13.90	80.44
GMRINFRA	3,51,68,601	16.90	58.37
GRUH	3,32,82,424	233.55	795.51
ASHOKLEY	2,75,48,584	94.55	260.77

Top Gainers

(NSE)

Name	Current Price	Previous Price	% Change
AXISBANK	671.20	650.90	3.12
ITC	291.50	284.25	2.55
TATAMOTORS	183.55	179.95	2.00
UPL	765.00	752.20	1.70
HDFC	1991.30	1958.95	1.65

Top Losers

(NSE)

Name	Current Price	Previous Price	% Change
HINDPETRO	238.15	247.95	-3.95
GAIL	341.00	354.60	-3.84
BPCL	340.00	351.95	-3.40
YESBANK	186.55	192.35	-3.02
ULTRACEMCO	3810.10	3916.30	-2.71

A/D Ratio – Negative

Advance	1108
Decline	1490
No Change	149

Technical Snapshot

Put call Ratio	0.96
PE multiple of Nifty	26.15

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MEMBER-BSE, CDSL, SEBI REGISTERED CATEGORY I MERCHANT BANKER
SEBI Registration No For Research Analyst: INH100002250

MUMBAI OFFICE

NAMAN MIDTOWN, SENAPATI BAPAT MARG,
PRABHADEVI STATION,
LOWER PAREL, MUMBAI-400 013
PHONE- +91 22 49060000

JAIPUR OFFICE

203-204, JAIPUR TOWERS,
M I ROAD, JAIPUR-302001
PHONE- + 91 1414051000