

End Day Commentary**Market Snap**04th May 2018

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Index	Previous Close	Open	High	Low	Close	Change	Change%
Sensex	35227.26	35503.24	35555.59	34982.25	35011.89	-215.37	-0.61%
Nifty	10696.20	10765.95	10770.30	10618.35	10628.50	-67.70	-0.63%

Indices settle with modest losses.

The 30-share BSE Sensex lost 215.37 points or 0.61% to settle at 35011.89 and the Nifty lost 67.70 points or 0.63% to settle at 10628.50. The BSE Mid-Cap lost 0.82%. The BSE Small-Cap index lost 2.09%. Both Indices has underperformed the Sensex in percentage terms. Indian equity benchmarks traded on volatile note throughout the day and ended the session with modest losses, dragged by heavy losses in banking and realty stocks. Key Indices opened on higher note but it could not sustain it. Meanwhile investors were also cautious ahead of the Reserve Bank of India's three-day monetary policy meeting begins today. The outcome of the policy meeting will be announced on 6 June. However, economists surveyed expect the central bank to keep the repo rate unchanged at 6%. On the sectoral front, Information Technology was sole top gaining indices on BSE while on the flip side; Realty, Consumer Durables, Auto, FMCG, Bank and Capital Goods were top losing indices on BSE. The top gainers on the Sensex were Dr Reddy, Infosys, M&M, Tata Steel and Reliance while on the flip side; HDFC Bank, Bharti Airtel, Adani Ports, Power Grid and HUL were the top losers. On global Front; Asian markets shut the day on green note while European indices were trading in green.

The market breadth indicating the overall health of the market was weak. On BSE, 566 shares rose and 2,122 shares fell. A total of 184 shares were unchanged.

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
Realty Sector			
HDIL	24.35	26.10	-6.70
DB Realty	46.00	48.35	-4.86
IB Real Estate	176.00	184.45	-4.58
Phoenix Mills	653.85	684.60	-4.49
Prestige Estates	229.65	239.55	-4.13
DLF	199.10	206.95	-3.79
Unitech Ltd	4.27	4.42	-3.39

Comment

The S&P Realty index ended at 2138.80 down by 71.87 points or by 3.25%. HDIL, DB realty, IB Real Estates and Phoenix Mills were among the major losers.

Most active (by value)*Rs. Cr (NSE)*

Name	Qty	Pr.	Vol.
HDFCBANK	2,21,99,081	2,045.00	4657.43
PCJEWELLER	5,00,42,802	130.60	682.03
RELIANCE	56,00,357	941.50	526.28
YESBANK	1,45,01,600	343.00	502.00
ICICIBANK	1,71,88,567	287.00	496.42

Name	Qty	Pr.	Vol.
RCOM	10,44,14,076	15.85	165.71
PCJEWELLER	5,00,42,802	130.60	682.03
GMRINFRA	4,11,94,550	16.50	68.38
SUZLON	3,05,67,213	8.10	24.88
SAIL	2,41,06,642	75.50	180.20

Top gainers*(NSE)*

Name	Closing Price	Previous close	%change
DRREDDY	1,988.00	1,941.40	2.40
INFY	1,241.00	1,220.80	1.65
LUPIN	774.95	764.45	1.37
HINDALCO	241.60	238.50	1.30
M&M	913.00	901.60	1.26

Top losers*(NSE)*

Name	Closing Price	Previous close	%change
IBULHSGFIN	1,177.95	1,233.35	-4.49
HDFCBANK	2,045.00	2,110.60	-3.11
BHARTIARTL	373.20	383.70	-2.74
ADANIPTS	378.50	387.60	-2.35
INFRATEL	294.05	300.65	-2.20

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
Consumer Durables Sector			
PC Jeweller	129.95	156.45	-16.93
Symphony	1438.80	1492.30	-3.58
Rajesh Exports	587.50	603.00	-2.57
Blue Star	678.75	696.45	-2.54
Titan Company	886.10	901.40	-1.69
Bajaj Electricals	530.25	539.00	-1.62
TTK Prestige	5965.25	6010.35	-0.75

Comment

The S&P Consumer Durables index ended at 20198.14 down by 376.37 points or by 1.83%. PC Jeweller, Symphony, Rajesh Exports and Blue Star were among the top losers.

Other Corporate News:

- **Lupin Ltd** shares rose 1.43% after the company ANNOUNCED it has launched generic Methylergonovine Maleate tablets in US.
- **Deep Industries Ltd** shares fell 19.94% after the company announced the Central Bureau of Investigation has registered a case against 13 officials of the ONGC Ltd and Deep Industries based on complaint filed by vigilance department of ONGC.
- **Tata Motors Ltd** shares were up 1.5% after the company registered a strong growth of 58% in May 2018. It sold 54,295 units as against 34,461 units last year and the company is continuing its strong sales performance in the Commercial and Passenger Vehicles Businesses in the domestic market.
- **Dr. Reddy's Laboratories Ltd** rose 3% after the USFDA completed inspection at the company's Srikakulam Plant with no observations.
- **Dilip Buildcon** announced that the order is for four laning of Bellary to Byrapura Section of NH-150A on Hybrid Annuity Mode under Bharatmala Pariyojana in Karnataka on Hybrid Annuity Mode Pkg - 1. The construction period of the project is 24 months.
- **Shivam Autotech** rose 1.56% after the company announced that it has achieved about 8% increase in sales in May 2018 over May 2017.



www.hemsecurities.com

research@hemsecurities.com

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, ELPHINSTONE ROAD, LOWER PAREL, MUMBAI-400 013

PHONE- +91 22 49060000

FAX- 0091 22 2262 5991

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

PHONE- 0091 141 405 1000

FAX- 0091 141 510 1757

GROUP COMPANIES

HEM FINLEASE PRIVATE LIMITED

MEMBER-NSE

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