

End Day Commentary

Market Snap

05th October 2017

Index	Previous Close	Open	High	Low	Close	Change	Change%
Sensex	31671.71	31725.85	31772.41	31562.25	31592.03	-79.68	-0.25%
Nifty	9914.90	9927.00	9945.95	9881.85	9888.70	-26.20	-0.26%

Indices snapped four day winning streak.

The 30-share BSE Sensex lost 79.68 points or 0.25% to settle at 31592.03 and the Nifty lost 26.20 points or 0.26% to settle at 9888.70. The BSE Mid-Cap rose 0.49%. The BSE Small-Cap index rose 0.79%. Both the Indices have outperformed the Sensex in percentage terms. Indian equity benchmarks traded on lackluster note throughout the day and ended the session with small losses as investors booked profits in oil refiners and worries about sustained capital outflows by foreign funds remained. Key Indices nudged higher in early trade on positive global stocks but it trimmed all early gains in last trading session. Meanwhile, services sector activity expanded for the first time in three months in September. On the sectoral front, Healthcare, Realty and Metal were top gaining indices on BSE while on the flip side Oil & Gas, Consumer Durables, Bank, Capital Goods and Auto were losing indices on BSE. The top gainers on the Sensex were NTPC, Coal India, M&M, Tata Motors (D) and Reliance while on the flip side ICICI Bank, Hero Motocorp, Bajaj Auto, Axis Bank 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 indicating the overall health of the market was positive. On the BSE, 1,503 shares rose and 1,151 shares fell. A total of 106 shares were unchanged.

BSE Sector	Current	Last	% Change
Realty Sector			
Phoenix Mills	549.95	510.90	+7.64
HDIL	56.65	55.20	+2.62
DLF	170.90	166.60	+2.58
Anant Raj	54.35	53.50	+1.58
DB Realty	35.65	35.25	+1.13
Prestige Estates	278.60	276.55	+0.74
Unitech Ltd	6.63	6.60	+0.45

Comment

The S&P Realty index ended at 2103.66 up by 18.01 points or by 0.86%. Phoenix Mills, HDIL, DLF and Anant Raj were among the major gainers.

Most active (by value)

Rs. Cr (NSE)

Name	Qty	Pr.	Vol.
Diamond	91,44,860	1,190.00	1130.43
Axis Bank	93,49,884	501.05	469.34
Graphite	88,90,304	480.95	422.71
DHFL	71,14,195	559.75	402.72
Reliance	48,60,479	824.00	400.18

Name	Qty	Pr.	Vol.
JP Associates	9,79,68,179	19.15	187.81
Suzlon	7,13,33,835	15.20	108.28
RCOM	2,48,64,059	17.05	42.34
BEPL	1,90,82,937	104.10	205.20
Fconsumer	1,80,48,415	64.85	116.00

Top gainers

(NSE)

Name	Closing Price	Previous close	%change
Auro Pharma	744.25	724.95	2.66
Ambuja Cement	274.75	269.55	1.93
NTPC	170.40	168.05	1.40
Yes Bank	359.95	355.80	1.17
Coal India	273.10	270.00	1.15

Top losers

(NSE)

Name	Closing Price	Previous close	%change
Tech Mahindra	450.00	465.05	-3.24
Bharti Infratel	404.55	416.50	-2.87
Power Grid	205.00	209.05	-1.94
Hind Petroleum	436.00	444.15	-1.83
ICICI Bank	272.00	276.10	-1.48

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
<u>Oil & Gas Sector</u>			
Hind Petroleum	435.65	444.05	-1.89
GAIL	430.90	436.35	-1.24
Bharat Petroleum	480.15	485.70	-1.14
IOC	405.85	408.90	-0.74
OIL	349.05	351.30	-0.64
ONGC	170.95	172.00	-0.61
Castrol	355.55	356.90	-0.37

Comment

The S&P Oil & Gas index ended at 15150.49 down by 84.59 points or by 0.56%. Hind Petroleum, GAIL and Bharat Petroleum and IOC were among the top losers.

Other Corporate News:

- **Maruti Suzuki India** announced that its total sales rose 9.3% to 1.63 lakh units in September 2017 over September 2016. Domestic sales rose 10.3% at 1.51 lakh units in September 2017 over September 2016. Export sales fell 1.3% at 11,671 units in September 2017 over September 2016. The announcement was made on Sunday, 1 October 2017.
- **Insilco** announced that the plant will continue to remain shut down till 07 October 2017 and is expected to restart on 08 October 2017. The Company had earlier intimated that the plant would remain shut from 21 September 2017 to 05 October 2017.
- **Vakrangee** announced its tie-up with IndusInd Bank for Bharat Bill Payment System platform to deliver wide range of bill payment services from Vakrangee Kendra outlets. Vakrangee shall be part of Bharat Bill Payment System's ecosystem, as National level partner, as Agent Institution (AI), to deliver nation-wide Electricity, Utility Bill Payments, DTH, Post-paid, Water Bills, Gas Bills along with Postpaid telecom bills from BSNL, MTNL, Vodafone, Airtel etc.
- **Confidence Petroleum India** announced that its subsidiary, Blueflame Industries, has commenced new cylinder manufacturing unit at Village Gutjora, Dhanbad, Jharkhand. The unit has capacity of 5 lakh cylinders per annum.
- **Glenmark Pharmaceuticals** rose 2.52% after reports that the UK drug regulator has renewed a manufacturing certificate for the company's Baddi unit. Czech drug body has also renewed the manufacturing certificate of Glenmark Pharmaceuticals' Fibichova unit in Czechia, reports added.

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