

End Day Commentary

Market Snap

17th October 2017

Index	Previous Close	Open	High	Low	Close	Change	Change%
Sensex	32633.64	32654.41	32699.86	32556.74	32609.16	-24.48	-0.08%
Nifty	10230.85	10227.65	10251.85	10212.60	10234.45	+3.60	+0.04%

Indices remained sideways after range bound session.

The 30-share BSE Sensex down 24.48 points or 0.08% to settle at 32609.16 and the Nifty rose 3.60 points or 0.04% to settle at 10234.45. The BSE Mid-Cap rose 0.40%. The BSE Small-Cap index rose 0.53%. Both the Indices have outperformed the Sensex in percentage terms. Indian equity benchmarks traded on volatile note throughout the day and ended the session almost near on flat line as investors turned cautious ahead of key corporate results and as profit booking in index heavyweights such as Reliance Industries and Tata Motors capped gains. Meanwhile market sentiment was subdued ahead of a long Diwali weekend. Positive global cues were also boosted domestic sentiment. On the sectoral front, Realty, Oil & Gas, Capital Goods and Healthcare were top gaining indices on BSE while on the flip side; Bank, Consumer Durables and Information Technology were losing indices on BSE. The top gainers on the Sensex were Cipla, Bharti Airtel, Asian Paints, Bajaj Auto and Hero Motocorp while on the flip side Axis Bank, Tata Motors, Infosys, Dr Reddy and SBI 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, 1,377 shares rose and 1,299 shares declined. A total of 129 shares were unchanged.

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
Realty Sector			
DB Realty	36.45	34.25	+6.42
DLF	178.85	172.95	+3.41
IB Real Estate	214.90	208.50	+3.06
Anant Raj	53.70	53.35	+0.65
Omaxe	202.45	201.60	+0.42
HDIL	55.80	55.70	+0.17
Phoenix Ltd	557.45	558.75	-0.23

Comment

The S&P Realty index ended at 2171.63 up by 16.96 points or by 0.79%. DB Realty, DLF, IB Real Estate and Anant Raj were among the major gainers.

Most active (by value)

Rs. Cr (NSE)

Name	Qty	Pr.	Vol.
DHFL	1,76,75,001	584.75	1027.04
Bharti Airtel	1,69,83,113	465.00	783.60
Reliance	63,54,084	874.80	555.87
Axis Bank	94,43,230	511.50	488.39
Federal Bank	3,64,47,919	126.00	460.92

Name	Qty	Pr.	Vol.
JP Associates	5,95,77,555	19.30	116.06
IDEA	4,25,75,442	89.75	372.19
Federal Bank	3,64,47,919	126.00	460.92
RCOM	2,91,03,796	17.00	49.45
JP Power	2,47,70,409	8.40	21.38

Top gainers

(NSE)

Name	Closing Price	Previous close	%change
Cipla	631.85	606.75	4.14
BPCL	514.00	498.40	3.13
Bharti Airtel	465.00	453.30	2.58
Hindalco	277.70	271.40	2.32
IB Housing Fin	1,324.60	1,295.10	2.28

Top losers

(NSE)

Name	Closing Price	Previous close	%change
ZEEL	495.80	514.45	-3.63
Axis Bank	511.50	520.35	-1.70
Dr Reddy	2,380.10	2,403.50	-0.97
Infosys	930.75	939.00	-0.88
UPL	806.00	812.35	-0.78

<i>BSE Sector</i>	<i>Current</i>	<i>Last</i>	<i>% Change</i>
<u>Oil & Gas Sector</u>			
Petronet	260.55	250.85	+3.86
BPCL	512.00	499.00	+2.78
Hind Petro	470.20	460.30	+2.15
Castrol Industry	378.75	373.75	+1.33
IOC	414.00	413.20	+0.19
Reliance	874.25	875.20	-0.10
GAIL	437.15	437.90	-0.17

Comment

The S&P Oil & Gas index ended at 15807.38 up by 116.18 points or by 0.74%. Petronet, BPCL, Hind Petro and Castrol Industry were among the top gainers.

Other Corporate News:

- **Panacea Biotec** announced that it has received the Certificate of GMP Compliance from State Service of Ukraine on Medicines and Drugs Control with Manufacturing Authorization for 22 medicinal products, including 4 oncology products for a period valid till 24 June 2020.
- **ACC** rose 0.79% after consolidated net profit vaulted 102.22% to Rs 182 crore on 25.42% rise in net sales to Rs 3054 crore in Q3 September 2017 over Q3 September 2016.
- **TCS** gained 0.65% after the company announced that BMB Investment Bank, Bahrain selected TCS BaNCS for Treasury to drive innovation and enhance customer experience.
- **DCB Bank** fell 3.4% after the bank's bad loans rose in Q2 September 2017 over Q2 September 2016. DCB Bank's net profit rose 21.47% to Rs 58.90 crore on 14.85% increase in total income to Rs 652.25 crore in Q2 September 2017 over Q2 September 2016.
- **Sasken Technologies** jumped 9.92% after consolidated net profit rose 8.5% to Rs 18.77 crore on 6.2% rise in revenue to Rs 124.84 crore in Q2 September 2017 over Q1 June 2017. Sasken Technologies' earnings before interest, tax, depreciation and amortization (EBITDA) rose 46.1% to Rs 18.73 crore in Q2 September 2017 over Q1 June 2017. Software services revenue rose 6.2% to Rs 124.84 crore in Q2 September 2017 over Q1 June 2017.
- **Aurobindo Pharma** gained 1.55% after the company announced that it has received final approval from the USFDA to manufacture Esomeprazole Magnesium Delayed-Release Capsules OTC, 20mg.
- **Godawari Power & Ispat** hit 5% upper circuit after the company announced that it received additional 28,700 metric tonnes of long-term coal linkage in coal linkage auction concluded on 16 October 2017 by Coal India.

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