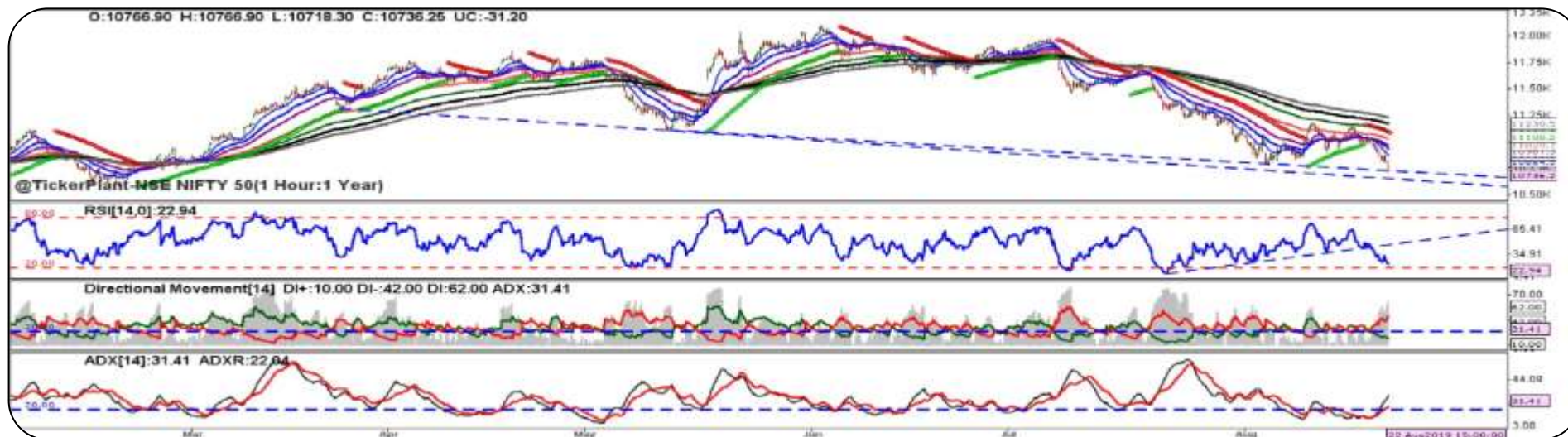


## Outlook



The Nifty ended 1.62% down at 10,741.35. It opened on an extremely weaker note followed by aggressive sell off towards ending the day with a huge bearish candle, which implies the Nifty may challenge 10,700 in tomorrow's trade. Next support is placed around 10,590. On the flipside intraday pullback towards 10,810 may again find sellers for lower lows towards 10,700 and 10,590.

On the Nifty hourly chart: ascending trend line breakdown is RSI took its toll that resulted in the benchmark index got hammered down brutally towards settling off the day nearer to day's low. Minor pullback from 10,700 may again find sellers around 10,810 levels. Hence, staying cautious on rise is advised.

Nifty patterns on multiple time frames suggest: breaking down recent established bottom around 10,800 implies current down trend is likely to persist. Intraday pullback may again find sellers around 10,810.

**Nifty Crucial Supports & Resistances for tomorrow-**  
Supports- 10700, 10590 Resistances- 10810, 10860

### Open Positional Calls-

#### T+3 Positional Sell-

**Futures Segment: JSW STEEL Fut @ 220-221, TGT- 211, SL- above 226**

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### Market Turnover (In Crore) 22-08-2019

| Name     | Last       | Previous   |
|----------|------------|------------|
| NSE Cash | 32893.3    | 28056.72   |
| NSE F&O  | 2517204.99 | 1316964.46 |
| BSE Cash | 3,915.80   | 1,969.18   |
| BSE F&O  | *NA        | 0.61       |

### FII Derivatives Flow (In Crore) 21-08-2019\*

| Instrument   | Purchase  | Sale      | Net     |
|--------------|-----------|-----------|---------|
| Index Future | 3372.62   | 3509.78   | -137.16 |
| Index Option | 269868.62 | 270800.50 | -931.88 |
| Stock Future | 12357.96  | 12685.58  | -327.62 |
| Stock Option | 5279.00   | 5386.25   | -107.25 |

### Institutional Flow (In Crore) 22-08-2019

| Institution | Purchase | Sale    | Net     |
|-------------|----------|---------|---------|
| FII         | 5345.72  | 6248.71 | -902.99 |
| DII         | 4967.25  | 3248.18 | 1719.07 |

### NIFTY Top Gainers

| Name          | %1D  | %5D   | Day Vol | Avg 5 Day Vol |
|---------------|------|-------|---------|---------------|
| Britannia     | 2.36 | -1.54 | 1252406 | 932552        |
| Dr. Reddy'S   | 1.69 | 1.33  | 529785  | 915822        |
| Tech Mahindra | 1.48 | 3.59  | 3353812 | 2917255       |
| TCS           | 1.36 | 0.53  | 2131601 | 1946682       |
| HUL           | 1.19 | 1.80  | 2543055 | 1490040       |

### NIFTY Top Losers

| Name               | %1D    | %5D    | Day Vol   | Avg 5 Day Vol |
|--------------------|--------|--------|-----------|---------------|
| Bajaj Finance      | -4.52  | -5.35  | 2506194   | 1840550       |
| Bajaj Finserv      | -5.30  | -8.74  | 710196    | 420603        |
| Indiabulls Finance | -6.82  | -18.28 | 29104118  | 27849830      |
| Vedanta            | -7.79  | -11.94 | 18923757  | 9295048       |
| Yes Bank           | -13.91 | -26.45 | 314692568 | 168085000     |

### Bulk and Block Deals

<https://www.nseindia.com/products/content/equities/equities/bulk.htm>  
<http://www.bseindia.com/markets/equity/EQReports/BulknBlockDeals.aspx>

### Market in Retrospect

Indian equity benchmarks declined for the third-straight session driven by losses in Yes Bank and private lenders. The Nifty slipped to a six-month low as investors anticipated stimulus to support businesses currently facing a slowdown.

The NIFTY 50 declined as much as 1.62% to 10,741.35. The broader markets represented by the NIFTY 500 Index fell 1.64%. NIFTY IT was the top gainer, gaining by 0.35%. NIFTY Realty was the top loser, losing by 6.17%.

Britannia was the top gainer, gaining by 2.36%, followed by Dr. Reddy & Tech Mahindra, which gained by 1.69% & 1.48 respectively. Yes Bank was the top loser, losing by 13.91%, followed by Vedanta, Indiabulls Housing Finance which fell by 7.79% & 6.82% respectively.

The Advance Decline ratio stood at 368:1433.

\*Data not updated till 5:50PM

**Market in Detailed (Updated after 4:00 PM)**

| Indian Indices |          |          |       |       |        |         |         | Global Indices |           |          |       |       |       |        |        | LME              |         |          |        |        |        |        |        |
|----------------|----------|----------|-------|-------|--------|---------|---------|----------------|-----------|----------|-------|-------|-------|--------|--------|------------------|---------|----------|--------|--------|--------|--------|--------|
| Name           | Index    | Net Chng | %1D   | %5D   | %1M    | %3M     | %1Y     | Name           | Index     | Net Chng | %1D   | %5D   | %1M   | %3M    | %1Y    | Name             | Index   | Net Chng | %1D    | %5D    | %1M    | %3M    | %1Y    |
| Sensex         | 36472.93 | -587.44  | -1.59 | -2.25 | -4.10  | -6.74   | -4.73   | Dow Jones      | 26202.73  | 240.29   | 0.93  | 2.84  | -3.57 | 1.65   | 1.82   | Gold(\$/Ounce)   | 1496.09 | -6.21    | -0.41  | -1.76  | 5.02   | 17.53  | 25.14  |
| Nifty          | 10741.35 | -177.35  | -1.62 | -2.61 | -5.33  | -8.49   | -7.17   | Nasdaq         | 8020.21   | 71.65    | 0.90  | 3.17  | -2.24 | 3.48   | 1.66   | Silver(\$/Ounce) | 17.00   | -0.14    | -0.80  | -1.64  | 3.78   | 17.53  | 15.06  |
| BSE M Cap      | 13080.60 | -178.88  | -1.35 | -2.94 | -6.53  | -10.85  | -21.03  | S&P 500        | 2924.43   | 23.92    | 0.82  | 2.95  | -2.03 | 2.39   | 2.19   | Aluminium        | 1750.25 | -1.25    | -0.07  | 0.37   | -4.03  | -0.68  | -13.76 |
| BSE S Cap      | 12119.43 | -270.89  | -2.19 | -3.59 | -7.88  | -15.66  | -28.49  | FTSE100        | 7160.31   | -43.81   | -0.61 | 1.32  | -4.72 | -2.37  | -5.47  | Copper           | 5706.75 | 24.00    | 0.42   | -0.56  | -5.76  | -4.33  | -5.17  |
| Nifty MC 100   | 15174.70 | -307.20  | -1.98 | -3.75 | -7.12  | -12.53  | -22.71  | CAC40          | 5413.67   | -17.62   | -0.32 | 3.45  | -2.68 | 0.72   | -0.05  | Zinc             | 2290.50 | 74.00    | 3.34   | 1.82   | -5.10  | -15.93 | -5.59  |
| BSE Auto       | 15489.74 | -252.48  | -1.60 | -0.51 | -5.08  | -16.68  | -37.06  | DAX            | 11797.57  | 1.35     | 0.01  | 3.43  | -3.95 | -3.00  | -4.69  | Lead             | 2083.25 | 25.75    | 1.25   | 1.78   | 1.91   | 16.12  | 4.95   |
| BSE Capgoods   | 16477.75 | -173.31  | -1.04 | -2.74 | -8.25  | -12.29  | -11.28  | Mexico IPC     | 40076.04  | 375.99   | 0.95  | 3.69  | -2.75 | -6.67  | -19.66 | Currency         |         |          |        |        |        |        |        |
| BSE FMCG       | 10796.48 | -12.81   | -0.12 | -1.29 | -1.21  | -7.68   | -13.58  | Brazil Bovespa | 101201.90 | 1979.65  | 2.00  | 0.94  | -2.64 | 7.25   | 31.60  | Name             | Rate    | Net Chng | %1D    | %5D    | %1M    | %3M    | %1Y    |
| BSE Metal      | 8200.10  | -296.11  | -3.49 | -8.70 | -21.41 | -23.04  | -37.68  | Russian RTS    | 1280.97   | 0.59     | 0.05  | 2.45  | -4.50 | -0.93  | 20.22  | INR              | 71.84   | 0.28     | -0.39  | -0.79  | -4.07  | -3.02  | -2.81  |
| BSE Oil&Gas    | 12401.86 | -335.29  | -2.63 | -5.68 | -11.76 | -18.44  | -17.18  | Japan Nikkei   | 20628.01  | 9.44     | 0.05  | 1.09  | -3.68 | -3.08  | -7.76  | USD Index        | 98.37   | 0.08     | 0.08   | 0.23   | 1.15   | 0.34   | 3.39   |
| BSE Healthcare | 12347.70 | -59.85   | -0.48 | -1.32 | -3.71  | -7.09   | -19.31  | Hang Seng      | 26048.72  | -221.32  | -0.84 | 2.17  | -8.19 | -5.98  | -6.73  | YUAN             | 7.09    | 0.02     | -0.33  | -0.74  | -2.89  | -2.54  | -3.45  |
| BSE Power      | 1843.06  | -25.34   | -1.36 | -2.26 | -8.12  | -4.11   | -8.83   | Taiwan Index   | 10529.78  | 3.98     | 0.04  | 1.96  | -3.79 | 0.69   | -2.54  | GBP              | 1.22    | 0.00     | 0.35   | 0.69   | -2.44  | -3.89  | -5.72  |
| BSE Realty     | 1871.93  | -119.63  | -6.01 | -8.09 | -11.39 | -9.48   | -11.61  | Shanghai Comp  | 2883.44   | 3.11     | 0.11  | 2.40  | -0.12 | -0.29  | 6.22   | EUR              | 1.11    | 0.00     | -0.07  | -0.27  | -1.18  | -0.65  | -4.48  |
| BSE ConsDur    | 22603.41 | -24.09   | -0.11 | -0.55 | -0.80  | -7.49   | 3.48    | KOSPI          | 1951.01   | -13.64   | -0.69 | 0.65  | -6.80 | -5.51  | -14.18 | YEN              | 106.45  | -0.17    | 0.16   | -0.31  | 1.33   | 3.67   | 3.86   |
| BSE Bank       | 30538.22 | -788.00  | -2.52 | -3.52 | -7.42  | -10.73  | -4.46   | Malaysia KLCI  | 1602.47   | 7.88     | 0.49  | 0.14  | -3.20 | -0.08  | -10.88 | Agro Commodities |         |          |        |        |        |        |        |
| BSE IT         | 15820.80 | 47.81    | 0.30  | 1.39  | 2.04   | 4.04    | 5.68    | Jakarta Comp   | 6239.25   | -13.72   | -0.22 | -0.29 | -3.02 | 5.04   | 4.96   | Name             | Price   | Net Chng | %1D    | %5D    | %1M    | %3M    | %1Y    |
| Bond Markets   |          |          |       |       |        |         |         | Indian Indices |           |          |       |       |       |        |        | Coffee           | 95.95   | -0.70    | -0.72  | -2.09  | -11.93 | -1.74  | -16.49 |
| Name           | Yield    | Net Chng | %1D   | %5D   | %1M    | %3M     | %1Y     | Name           | Index     | Net Chng | %1D   | %5D   | %1M   | %3M    | %1Y    | Cotton           | 59.63   | -0.31    | -0.52  | 0.02   | -5.89  | -9.90  | -22.83 |
| US             | 1.59     | 0.00     | 0.11  | 4.20  | -22.25 | -33.21  | -43.56  | Philippine SE  | 7848.83   | -38.08   | -0.48 | -0.12 | -5.09 | 1.65   | 4.64   | Sugar            | 11.40   | 0.01     | 0.09   | -1.98  | -1.38  | -5.32  | -3.31  |
| UK             | 0.50     | 0.02     | 5.01  | 23.28 | -28.96 | -50.44  | -60.46  | Thai Exch      | 1633.56   | -4.68    | -0.29 | 1.84  | -5.44 | 0.41   | -3.81  | Wheat            | 468.25  | 0.25     | 0.05   | -1.32  | -6.16  | -5.26  | -20.77 |
| Brazil         | 4.44     | 0.00     | -0.02 | 0.23  | -1.73  | -12.98  | -23.06  | Indian Indices |           |          |       |       |       |        |        | Soybean          | 874.00  | 1.00     | 0.11   | 0.37   | -3.51  | 2.19   | -4.40  |
| Japan          | -0.24    | 0.00     | 0.00  | -1.29 | -73.53 | -321.43 | -338.38 | Name           | Index     | Net Chng | %1D   | %5D   | %1M   | %3M    | %1Y    | Freight          |         |          |        |        |        |        |        |
| Australia      | 0.91     | -0.02    | -2.25 | 2.59  | -31.61 | -44.28  | -64.13  | NYMEX Crude    | 56.14     | 0.39     | 0.70  | 2.94  | -0.27 | -8.71  | -17.37 | Name             | Index   | Net Chng | %1D    | %5D    | %1M    | %3M    | %1Y    |
| India          | 6.55     | -0.01    | -0.21 | 0.12  | 2.10   | -9.74   | -16.29  | BRENT Crude    | 60.75     | 0.42     | 0.70  | 4.28  | -3.66 | -11.32 | -16.71 | Baltic Dry       | 2061.00 | 2.00     | 0.10   | 5.69   | -5.93  | 94.62  | 18.79  |
| Switzerland    | -0.94    | 0.03     | 2.90  | 16.25 | -49.60 | -147.49 | -745.05 | Natural Gas    | 2.15      | -0.01    | -0.46 | -3.23 | -5.80 | -16.02 | -20.38 | Baltic Dirty     | 659.00  | 2.00     | 0.30   | 4.44   | 5.61   | -1.93  | -16.69 |
| Germany        | -0.65    | 0.02     | 3.28  | 9.12  | -87.28 | -653.49 | -288.37 |                |           |          |       |       |       |        |        | SG Dubai HY      | 3.08    | -0.37    | -10.72 | -31.10 | -59.53 | 55.56  | -53.47 |

## **Domestic News**

### **L&T arm, EMAS AMC PTE consortium bags order from Saudi Aramco**

Larsen & Toubro has announced that a consortium of its arm LTHE, and EMAS AMC PTE Ltd has been awarded a project by Saudi Aramco for offshore jackets. The project is for installing 28 offshore jackets in Zuluf, Marjan, Sfaniya and Ribyan offshore fields of Saudi Arabia. The award demonstrates Saudi Aramco's trust on LTHE's capability to deliver to a challenging schedule with excellent safety and quality performance. LTHE's fabrication facilities in the Middle East and India are fully equipped to execute these challenging projects.

### **Biocon's Malaysian arm gets EU GMP certification for insulin manufacturing facility**

Biocon announced that its Malaysian arm has received the European Union Good manufacturing practice (EU GMP) certification for its insulins facility in Malaysia. Biocon Sdn Bhd, the company's subsidiary in Malaysia has received the Certificate of GMP compliance from the European Medicines Agency from the representative European inspection authority, Health Products Regulatory Authority (Ireland). The integrated insulins facility in Malaysia manufactures drug substance and drug products in vials, cartridges, and insulin delivery devices was inspected in May 2019. The recombinant human Insulin (rh-Insulin) and Insulin Glargine manufactured at this facility are addressing the needs of over 3,50,000 diabetic patients in Malaysia. Co.'s rh-Insulin is registered in over 40 countries worldwide and has been commercialised in many emerging markets. The company's biosimilar Insulin Glargine has been approved in over 60 countries and is commercialised in several key emerging markets.

### **France's Total drops out of HPCL's second LPG cavern project**

HPCL will go solo in building its second liquefied petroleum gas (LPG) cavern in Mangalore, Karnataka. HPCL, which was in talks with France's national oil company Total SA to partner in building an underground LPG storage facility, said the French multinational has dropped out of the project but did not provide a reason for the same. Total SA is HPCL's partner in the first LPG cavern in Visakhapatnam, Andhra Pradesh. The cavern will be the second such facility in India and will cost INR800 crore for 80,000 metric tonne capacity. HPCL already has an LPG import facility in Mangalore. Looking at growing demand for LPG, HPCL thinks a new cavern is a commercially viable option. HPCL expects to complete the project in four years.

## Events

### CORPORATE ACTION BONUS / RIGHTS / STOCK SPLIT / DIVIDEND / FCCB / M&A / WARRANTS ETC.

| Company                    | Record Date | Ex-Date | Details                                       |
|----------------------------|-------------|---------|---|
| Dhampur Sugar Mills Ltd    |             |         | Cash dividend of INR3 effective 23/08/2019    |
| Bhageria Industries Ltd    |             |         | Cash dividend of INR2.25 effective 23/08/2019 |
| Manappuram Finance Ltd     |             |         | Cash dividend of INR0.55 effective 23/08/2019 |
| Grasim Industries Ltd      |             |         | Corporate meeting effective 23/08/2019        |
| Divi's Laboratories Ltd    |             |         | Corporate meeting effective 23/08/2019        |
| Lumax Industries Ltd       |             |         | Corporate meeting effective 23/08/2019        |
| Bosch Ltd                  |             |         | Corporate meeting effective 23/08/2019        |
| JK Paper Ltd               |             |         | Corporate meeting effective 23/08/2019        |
| Speciality Restaurants Ltd |             |         | Corporate meeting effective 23/08/2019        |
|                            |             |         |   |
|                            |             |         |   |
|                            |             |         |   |
|                            |             |         |   |

#### Domestic Events

- India Foreign Exchange Reserve for August 16, 2019.

#### Global Events

- Japan Inflation for July 2019.,
- The U.S. New Home Sales for July 2019.

Source of News : The content may have been taken from The Economic Times, Business Standard, Business Line, Mint and other leading financial newspapers and financial portals BSE,NSE, Bloomberg, Moneycontrol & others.



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