



The Nifty ended 0.26% down at 15,680.00. It opened on a flat note and remained range-bound with a negative bias throughout the session towards finishing off with another bearish body candle. Short-term trend suggests it may retest most critical support placed around 15,600 levels. However, breaking down 15,600 is unlikely at this juncture. Chart pattern suggests, the benchmark index might get into the trading range of 15,600-15,900. On the flipside, sharp decline towards 15,450 is likely if the benchmark index breaks down 15,600 decisively.

On the Nifty hourly chart, oversold leading indicators brightens the possibility of intraday pullback from around 15,600 levels.

Nifty patterns on multiple periods suggest; it ended the day with a bearish candle for the fourth consecutive session. However, immediate pivotal support is placed around 15,600 is still intact.

### Nifty Crucial Supports & Resistances-

**Supports- 15700, 15600 Resistances- 15850, 15900**

### Open Positional Calls-

T+10 Positional Buy-  
|Cash Segment| BHEL @ 64-60, TGT - 80, Closing SL- 50

T+5 Positional Buy-  
|Cash Segment| GLENMARK on dips around @ 665-660, TGT- 700, SL- closing below 640

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## Nifty Intraday Chart



## Market in Retrospect

Indian equities declined for a fourth day as a rebound in auto, pharma and FMCG was overshadowed by profit booking in financials and IT space.

Nifty index ended 0.26% lower at 15,680. The broader markets represented by the NIFTY 500 Index ended 0.14% lower, ending at 13,454. Among the sectorial indices, NIFTY Pharma was the top gainer, gaining by 0.93%, followed by NIFTY Auto which was gaining by 0.82%. NIFTY IT was the top loser, losing by 0.57%

Dr. Reddy's Lab was the top gainer, gaining by 2.50%, followed by Hindalco Industries and Bajaj Auto gained by 1.98% & 1.71% respectively. Bajaj Finserv was the top loser, losing by 2.42%, followed by Shree Cement and Britannia Industries which fell by 1.62% & 1.48% respectively.

The Advance : Decline ratio stood at 968:1008

## Market Turnover (In Crore) 01-07-2021

Name	Last	Previous
NSE Cash	*NA	58495.85
NSE F&O	8409744.70	4950416.46
BSE Cash	4,462.15	5,628.80
BSE F&O	*NA	110.35

## FII Derivatives Flow (In Crore) 30-06-2021\*

Instrument	Purchase	Sale	Net
Index Future	3964.62	3517.94	446.68
Index Option	392653.72	392248.75	404.97
Stock Future	10592.87	11138.55	545.68
Stock Option	8313.26	8462.88	149.62

## Institutional Flow (In Crore) 30-06-2021\*

Institution	Purchase	Sale	Net
FII	6057.48	7704.14	1646.66
DII	6171.14	4650.96	1520.18

\*Data not update till 5:40pm

## NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Dr. Reddy'S Lab	2.50	5.32	831550	493513
Hindalco Industries	1.98	2.80	8232292	11123660
Bajaj Auto	1.71	0.53	755502	262415
Tata Motors	1.37	2.87	27944816	19318140
Sun Pharmaceutical	1.29	2.91	4102748	3304023

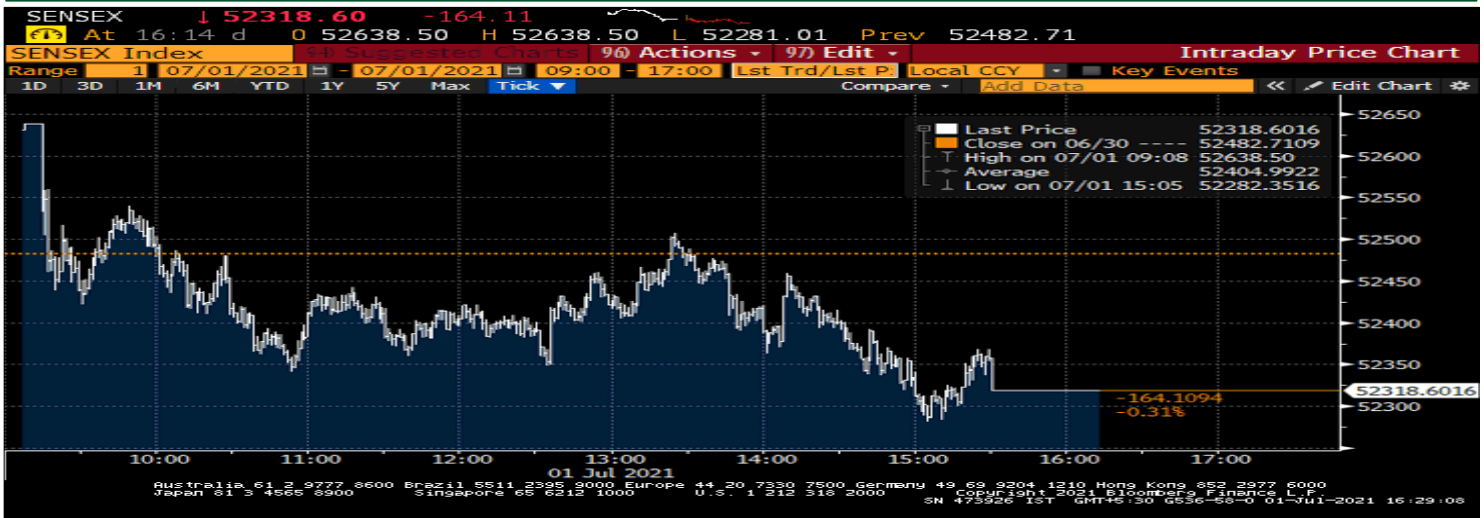
## NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Wipro	1.15	1.77	4329374	5837907
Infosys	1.29	0.08	4814317	7511369
Britannia Industries	1.48	2.53	612678	305921
Shree Cement	1.62	5.62	67327	29324
Bajaj Finserv	2.42	4.19	321521	210306

## Bulk and Block Deals

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

## Sensex Intraday Chart



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

Indian Indices							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	52318.60	164.11	0.31	0.72	0.74	4.57	47.73
Nifty	15680.00	41.50	0.26	0.70	0.68	5.47	50.33
BSE M Cap	22494.14	22268.78	9881.45	0.78	3.37	9.64	71.99
BSE S Cap	25312.59	25060.27	9931.87	1.67	7.61	20.13	103.66
Nifty MC 100	26882.60	88.15	0.33	1.06	4.40	11.46	81.91
BSE Auto	23960.25	188.49	0.79	0.88	2.06	6.06	57.07
BSE Capgoods	22858.30	90.68	0.40	0.23	1.56	6.58	79.89
BSE FMCG	13569.00	51.05	0.38	0.26	3.31	5.46	19.85
BSE Metal	18651.47	13.28	0.07	2.50	0.44	23.30	157.98
BSE Oil&Gas	16145.95	29.56	0.18	3.19	2.67	7.03	26.48
BSE Healthcare	25753.46	164.44	0.64	3.84	4.96	19.62	59.28
BSE Power	2715.87	39.61	1.44	3.43	3.56	6.77	74.17
BSE Realty	2731.45	9.23	0.34	0.71	2.45	1.99	73.66
BSE ConsDur	35619.31	43.88	0.12	0.74	6.41	8.57	75.72
BSE Bank	39269.11	80.87	0.21	0.40	2.12	2.69	57.46
BSE IT	29961.02	174.91	0.58	0.29	8.86	11.92	101.48

Bond Markets							
Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	1.47	0.01	0.46	1.15	8.19	11.69	118.22
UK	0.74	0.02	2.93	0.54	10.78	7.30	249.29
Brazil	3.76	0.05	1.21	1.54	0.32	13.45	23.80
Japan	0.04	0.02	27.59	25.00	49.40	62.83	10.64
Australia	1.52	0.01	0.65	2.88	10.17	17.44	62.57
India	6.04	0.01	0.20	0.17	0.25	2.06	3.43
Switzerland	0.22	0.01	3.15	5.91	47.26	29.97	45.84
Germany	0.19	0.02	10.15	1.06	4.49	43.29	52.91

Currency							
Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	74.56	0.23	0.31	0.52	2.23	1.94	1.39
USD Index	92.49	0.05	0.06	0.73	2.96	0.47	4.84
YUAN	6.47	0.01	0.16	0.06	1.34	1.51	9.32
GBP	1.38	0.01	0.38	1.03	2.63	0.40	10.44
EUR	1.19	0.00	0.06	0.56	2.85	0.75	5.46
YEN	111.50	0.39	0.35	0.57	1.81	0.79	3.61

Freight							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	3383.00	35.00	1.02	7.50	31.74	63.27	87.63
Baltic Dirty	598.00	7.00	1.16	4.17	0.00	14.45	28.88
SG Dubai HY	0.29	0.05	14.71	39.58	63.75	164.44	281.25

Global Indices							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	34502.51	210.22	0.61	1.85	0.21	4.07	34.07
Nasdaq	14503.95	24.38	0.17	1.63	5.59	7.60	42.83
S&P 500	4297.50	5.70	0.13	1.31	2.27	6.91	37.92
FTSE100	7078.96	37.88	0.54	0.49	0.07	5.02	14.90
CAC40	6518.55	6.13	0.09	1.77	0.38	6.73	32.21
DAX	15540.00	0.65	0.00	0.37	0.23	2.81	26.68
Mexico IPC	50289.75	47.61	0.09	0.24	0.85	6.44	33.68
Brazil Bovespa	126801.7	525.70	0.41	1.27	1.14	10.02	31.81
Russian RTS	1667.89	14.32	0.87	0.19	3.34	14.46	37.56
Japan Nikkei	28707.04	84.49	0.29	0.58	0.37	2.32	29.77
Hang Seng	28827.95	166.15	0.57	0.04	2.17	0.38	18.02
Taiwan Index	17713.94	41.52	0.23	1.76	3.21	6.90	51.36
Shanghai Comp	3588.78	2.42	0.07	0.62	0.99	3.53	18.60
KOSPI	3282.06	14.62	0.44	0.12	1.87	6.30	55.79
Malaysia KLCI	1534.23	1.60	0.10	1.38	3.26	3.06	1.31
Jakarta Comp	6005.96	20.47	0.34	0.10	0.98	0.09	22.21
Philippine SE	6964.01	62.10	0.90	1.13	5.08	8.08	12.15
Thai Exch	1593.75	5.96	0.38	0.51	1.53	0.09	18.10

Indian Indices							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	74.94	1.41	1.92	2.16	10.57	21.86	88.05
BRENT Crude	75.96	1.29	1.73	1.47	8.68	19.11	71.94
Natural Gas	3.73	0.08	2.11	8.44	19.23	33.97	45.93

LME							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1775.54	4.82	0.27	0.01	6.60	2.64	0.27
Silver(\$/Ounce)	26.23	0.10	0.40	1.09	5.96	5.04	45.62
Aluminium	2509.50	28.50	1.12	3.99	2.07	14.72	56.67
Copper	9351.50	39.25	0.42	1.07	8.75	6.42	55.74
Zinc	2966.75	17.25	0.58	3.08	2.52	5.76	45.66
Lead	2265.00	69.50	2.98	3.91	3.13	16.01	28.46

Agro Commodities							
Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	162.60	2.85	1.78	6.00	0.28	29.67	45.37
Cotton	85.53	0.63	0.74	1.38	0.85	9.78	38.62
Sugar	18.13	0.24	1.34	5.16	2.37	23.00	48.61
Wheat	681.50	2.00	0.29	4.52	2.26	11.27	29.62
Soybean	1415.50	16.50	1.18	9.58	1.32	12.01	59.31

## **SpiceJet**

SpiceJet has reported a net loss of INR235.34 crore for the quarter ended March 31, 2021 as business remains under the clutches of Covid-19 pandemic. The domestic carrier had posted a loss of INR807 crore in the corresponding period of the previous fiscal. For the entire financial year 2020-21, the airlines saw its net loss widen to INR998.3 crore from INR934.76 crore in the previous fiscal. Total income declined to INR2,194.7 crore in Q4 FY21 from INR3,057.34 crore Q4 FY20. For the full fiscal, total income halved to INR6,120.8 crore from INR13,206.42 crore. While passenger business suffered due to the Covid-mandated restrictions, SpiceJet's cargo business "continued to provide much required lifeline" to its overall operations. On a segment basis, the revenue from cargo operations increased over 514 per cent to INR416.5 crore for Q4 FY21 with profit of INR67.8 crore in corresponding previous quarter ending March 2020. SpiceJet claimed to have posted industry's highest domestic load factor at 77.3 per cent during the last quarter of FY21, while its passenger revenue grew 15 per cent sequentially.

## **Coffee Day Enterprises**

Coffee Day Enterprises reported a consolidated net loss of INR272.09 crore for the fourth quarter ended March 2021. The company had posted a net profit of INR554.80 crore in the January-March period a year ago, Coffee Day Enterprises Ltd. CDEL's revenue from operations dropped 69 per cent to INR165.16 crore as against INR533.55 crore in the corresponding quarter last fiscal. According to CDEL, profit after tax (PAT) for Q4 FY21 includes INR151 crore loss on account of market valuation of its holding of equity shares in Sical Logistics. Its total expenses were at INR378.52 crore, down 70.3 per cent from INR1,273.46 crore earlier. Revenue from coffee and related business fell 61.4 per cent to INR141.05 crore, as against INR365.33 crore. Revenue from hospitality services rose 39.79 per cent to INR10.68 crore compared to INR7.64 crore earlier. For the full fiscal 2020-21, CDEL reported a net loss of INR652.10 crore. It had posted a net profit of Rs 1,848.51 crore in the previous year. Revenue from operations declined 66.6 per cent to INR853.42 crore from INR2,552.44 crore in FY20.



### **L&T Construction bags 'significant' orders for various businesses**

Larsen and Toubro announced that its construction arm has secured 'significant' orders for its various businesses. The company did not provide the value of the contracts, but said the orders fall under the “significant” category, which ranges between Rs 1,000 crore and Rs 2,500 crore. The water and effluent treatment business has won a repeat order from the Uttar Pradesh State Water & Sanitation Mission (SWSM) to implement rural water supply projects providing functional house tap connection under the Jal Jeevan Mission. The buildings and factories business has secured an order from a reputed developer to construct residential towers in Mumbai's suburb of Mulund. The scope of the work includes construction of the civil structure including waterproofing, masonry and plastering for seven residential towers with a built-up area of 4.3 million square feet comprising a basement, ground plus 55 floors. The project is to be executed within stringent timelines.

### **Chemical manufacturer Sajjan India is up for sale, promoters eye Rs 8000 cr deal**

Sajjan India Ltd is exploring to sell a controlling stake in the family-driven entity as it looks to reap benefits of a post-pandemic capital inflow into core industrial assets across emerging markets. The Gujarat-based firm, controlled by Madhav Prasad Aggarwal, has hired investment bank JP Morgan to run the sale process, according to multiple people aware of the development. The company is expected to be valued at around Rs8000 crore.

### **Temasek-owned Olam to sell Maharashtra Sugar plant to Wilmar-Renuka for Rs 350-500 crore**

Olam International, controlled by Singaporean state investor, Temasek Holdings is in advance talks with Indian sugar maker Renuka-Wilmar to sell its plant in Maharashtra for around Rs 350-400 crore as part of getting out from non-core business verticals. The transaction is part of Olam's strategic decision to exit from Sugar business globally.

### **Alembic Pharma gets USFDA nod for generic Nitrofurantoin capsules**

Alembic Pharmaceuticals has received approval from the US health regulator for its generic Nitrofurantoin capsules indicated for the treatment of urinary tract infections. The company has received final approval from the US Food & Drug Administration (USFDA) for its abbreviated new drug application (ANDA) for Nitrofurantoin capsules, USP in the strengths of 25 mg, 50 mg and 100 mg. The product is a generic version of Alvogen Malta Operations Ltd's Macrochantin capsules in the same strengths. Nitrofurantoin capsules, USP (Macrocrystals), 25 mg, 50 mg and 100 mg have an estimated market size of USD 23 million for the twelve months ending March 2021. It is specifically indicated for the treatment of urinary tract infections when due to susceptible strains of escherichia coli, enterococci, staphylococcus aureus, and certain susceptible strains of klebsiella and enterobacter species. The company has a cumulative total of 146 abbreviated new drug application (ANDA) approvals (128 final approvals and 18 tentative approvals) from USFDA.

### **Power consumption grows nearly 10 pc to 115.39 BU in June**

Power consumption in the country grew by nearly 10 per cent in June to 115.39 billion units (BU) compared to a year ago, but is still lower than the pre-COVID level, according to power ministry data. Power consumption had slumped to 105.08 BU in June 2020, mainly due to fewer economic activities amid COVID-induced restrictions. Notwithstanding the improvement, the power consumption in June 2021 is still lower than June 2019 (pre-COVID level), when it was at 117.98 BU. On a month-on-month basis power consumption grew by 4.7 per cent in June compared to 110.17 BU in May this year.



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