



The Nifty previous session ended 0.04% down at 17382.00. It opened on a bullish note and remained extremely choppy throughout the session towards ending on a subdued note. Short-term pattern suggesting the Nifty may find difficulty breaking out thick resistance placed in the price range of 17500-17550. Hence, staying cautious on rise is advised. However, intraday retracement may again find buyers on dips around critical supports. Immediate range likely to be 17200-17500.

On the Nifty hourly chart, negative divergence in RSI suggesting upside might be limited up to 17500 and 17550 levels.

Nifty patterns on multiple periods suggesting; ending the day on a subdued note suggesting range-bound oscillation with a positive bias. Overbought index majors may lead to intraday retracement. Hence, staying cautious on rise is advised.

### Nifty Crucial Supports & Resistances-

**Supports- 17200, 17130 Resistances- 17500, 17550**

### Open Positional Calls-

T+30 INST POSITIONAL BUY-  
|Cash Segment| LT @ 1650-1600, TGT- 1850, Closing SL- below 1520

T+15 INST POSITIONAL BUY-  
|Cash Segment| BATA @ 1910-1900, TGT- 2040, Closing SL- below 1830

T+30 INST POSITIONAL BUY-  
|Cash Segment| HDFC BANK @ 1430-1410, TGT- 1550 & 1610, Closing SL- below 1310

T+5 SELL-  
|Fut Segment| GAIL @ 142-144, TGT- 132, Closing SL- above 150

### Key Contents

Result Update

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## Nifty Intraday Chart



## Market in Retrospect

India's stock benchmarks Nifty and Sensex snapped a six-day winning streak to close lower on Thursday, dragged by banking and telecom stocks amid a slew of weak earnings. The decline comes a day ahead of a rate decision by the Monetary Policy Committee of the Reserve Bank of India.

Nifty index ended 0.04% lower at 17,382. The broader markets represented by the Nifty 500 Index ended 0.10% higher, ending at 14,892. Among the sectorial indices, Nifty Pharma was the top gainer gaining by 2.37%, followed by Nifty IT which was gaining 1.24%. Nifty PSU Bank was the top loser losing by 1.75%.

Cipla was the top gainer, gaining by 3.23%, followed by Nestle and Sun pharma which gaining by 2.50% & 2.40%. NTPC was the top loser, losing by 3.10%, followed by Tata Cons Products and Coal India which losing by 2.89% & 2.33% respectively.

## Market Turnover (In Crore) 04-08-2022

Name	Last	Previous
NSE Cash	61346.32	57396.79
NSE F&O	31234157.27	12632038.45
BSE Cash	4,169.82	6,931.90
BSE F&O	*NA	359.00

## FII Derivatives Flow (In Crore) 04-08-2022

Instrument	Purchase	Sale	Net
Index Future	3421.67	4251.52	829.85
Index Option	2495243.95	2494114.63	1129.32
Stock Future	12647.40	11945.70	701.7
Stock Option	9113.12	8949.30	163.82

## Institutional Flow (In Crore) 04-08-2022

Institution	Purchase	Sale	Net
FII	10148.58	9383.41	765.17
DII	5865.37	6383.79	518.42

## NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Cipla	3.23	7.96	2865077	2774155
Nestle India	2.50	3.86	88280	82079
Sun Pharma	2.40	2.64	3151481	4725159
Infosys	2.16	5.44	7402209	5403229
Apollo Hospitals	1.99	4.90	358472	363626

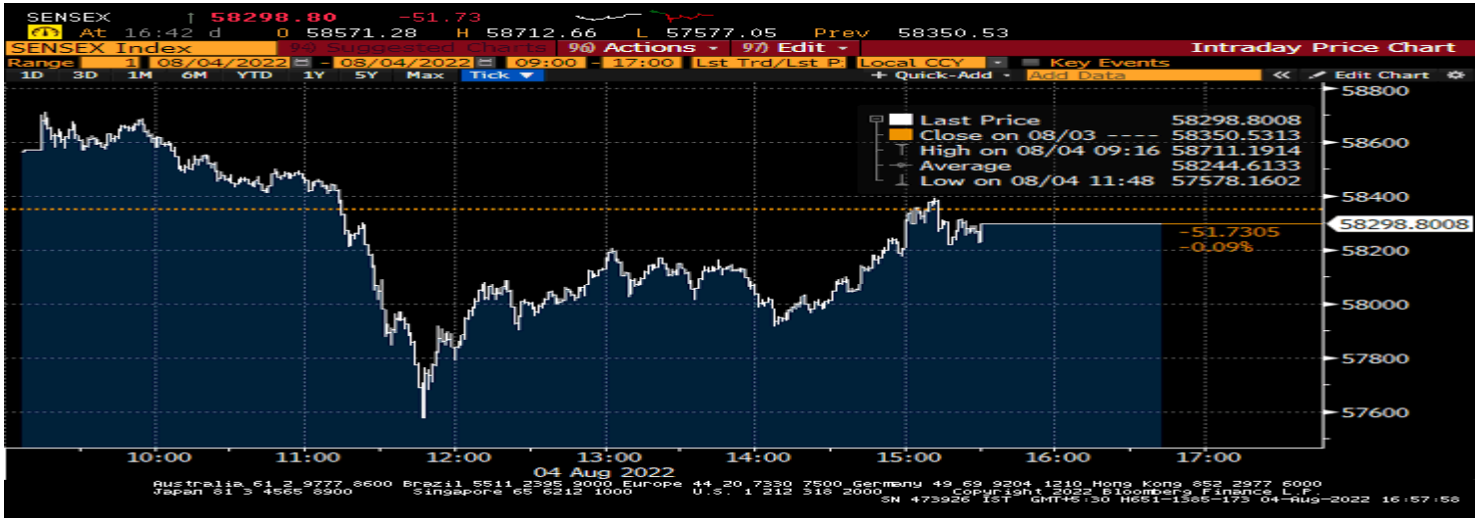
## NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
RIL	1.32	4.67	6676577	6599050
SBI	1.41	0.15	18072293	14696920
Coal India	2.33	2.12	8058280	9597866
Tata Cons Products	2.89	2.15	15358133	1279881
NTPC	3.10	2.89	15754128	12090120

## Bulk and Block Deals

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

## Sensex Intraday Chart



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

### Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	58298.80	51.73	0.09	2.53	9.72	4.66	6.98
Nifty	17382.00	6.15	0.04	2.67	9.94	4.19	6.67
BSE M Cap	24458.22	70.10	0.29	2.72	10.99	3.35	5.74
BSE S Cap	27541.52	69.73	0.25	3.19	10.37	0.80	2.58
Nifty MC 100	30190.85	173.20	0.58	3.32	13.08	3.73	8.09
BSE Auto	29697.67	89.83	0.30	4.71	11.39	21.90	29.45
BSE Capgoods	29742.48	65.62	0.22	0.95	13.34	11.24	24.73
BSE FMCG	15609.12	60.55	0.39	1.39	7.98	12.54	14.59
BSE Metal	18410.54	183.94	1.01	5.86	19.14	13.74	13.39
BSE Oil&Gas	19371.06	33.18	0.17	4.22	11.39	0.44	22.99
BSE Healthcare	23252.34	439.18	1.93	2.59	6.98	0.82	11.83
BSE Power	4762.78	30.53	0.64	5.92	16.80	1.02	79.99
BSE Realty	3477.84	38.97	1.11	2.23	11.51	3.36	6.95
BSE ConsDur	40451.31	271.76	0.68	3.73	15.21	1.32	10.21
BSE Bank	43346.93	311.92	0.71	0.67	11.44	6.81	6.24
BSE IT	30169.25	367.86	1.23	4.05	6.24	3.27	4.06

### Bond Markets

Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	2.72	0.02	0.74	1.82	5.41	7.15	130.51
UK	1.88	0.03	1.62	0.70	14.34	4.32	267.38
Brazil	5.58	0.04	0.78	3.14	11.11	1.64	48.21
Japan	0.18	0.01	5.82	13.17	22.27	22.94	2866.67
Australia	3.14	0.07	2.28	1.93	11.69	11.21	174.59
India	7.16	0.08	1.13	2.19	2.94	3.00	15.49
Switzerland	0.44	0.04	8.18	3.79	54.18	48.95	208.69
Germany	0.85	0.02	2.63	3.03	36.16	12.36	269.86

### Currency

Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	79.47	0.31	0.39	0.36	0.66	3.84	6.65
USD Index	106.29	0.21	0.20	0.06	1.10	3.61	15.20
YUAN	6.76	0.00	0.02	0.14	0.83	2.19	4.30
GBP	1.21	0.00	0.30	0.55	0.04	4.10	12.79
EUR	1.02	0.00	0.23	0.08	2.24	4.08	13.92
YEN	134.22	0.36	0.27	0.04	1.04	3.82	18.43

### Freight

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	1731.00	86.00	4.73	13.75	19.82	30.34	47.83
Baltic Dirty	1454.00	20.00	1.36	0.83	18.99	18.60	139.54
SG Dubai HY	18.74	4.23	29.15	13.00	22.40	44.78	2615.94

### Global Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	32812.50	416.33	1.29	1.91	5.52	3.67	5.69
Nasdaq	12668.16	319.40	2.59	5.28	13.84	2.29	14.29
S&P 500	4155.17	63.98	1.56	3.27	8.62	3.37	5.62
FTSE100	7466.30	20.26	0.27	1.64	3.23	0.37	4.80
CAC40	6531.85	60.46	0.93	3.05	9.70	2.14	3.17
DAX	13730.35	143.08	1.05	3.38	7.49	1.72	12.50
Mexico IPC	46989.61	86.92	0.19	0.31	2.18	8.64	8.22
Brazil Bovespa	103774.7	412.98	0.40	2.30	5.24	4.22	14.80
Russian RTS	1108.97	2.97	0.27	2.54	11.21	0.46	32.39
Japan Nikkei	27932.20	190.30	0.69	0.42	5.71	4.15	0.74
Hang Seng	20174.04	406.95	2.06	2.18	7.68	2.98	23.01
Taiwan Index	14702.20	74.82	0.51	1.27	2.46	11.94	16.48
Shanghai Comp	3189.04	25.37	0.80	2.85	6.32	3.95	8.01
KOSPI	2473.11	11.66	0.47	1.55	5.61	7.64	24.51
Malaysia KLCI	1507.71	17.14	1.15	1.11	4.64	4.75	0.80
Jakarta Comp	7057.35	10.71	0.15	1.45	5.28	2.37	13.73
Philippine SE	6483.11	53.03	0.82	1.63	2.74	5.62	0.98
Thai Exch	1598.75	4.02	0.25	2.93	3.73	2.71	4.65

### Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	91.12	0.46	0.51	5.50	15.96	15.48	33.71
BRENT Crude	96.88	0.08	0.08	4.88	11.51	7.88	47.54
Natural Gas	8.37	0.11	1.27	2.91	46.55	0.49	150.55

### LME

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1781.60	16.37	0.93	1.47	1.47	5.29	1.66
Silver(\$/Ounce)	20.27	0.21	1.03	1.29	1.42	11.80	20.14
Aluminium	2379.85	40.40	1.67	2.02	1.94	17.23	7.83
Copper	7671.75	137.00	1.75	0.58	4.58	18.44	19.43
Zinc	3389.00	23.00	0.67	7.66	10.25	15.04	14.53
Lead	2022.50	26.50	1.29	0.12	4.39	9.98	17.06

### Agro Commodities

Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	218.35	3.70	1.72	0.02	2.80	1.09	18.70
Cotton	94.19	0.24	0.25	2.10	3.38	27.42	15.49
Sugar	17.72	0.05	0.28	0.00	1.94	5.64	6.75
Wheat	763.75	0.00	0.00	6.52	9.72	29.23	6.59
Soybean	1365.25	4.50	0.33	5.22	2.15	8.16	8.94

### Adani Transmission

Adani Transmission Limited (ATL) reported a consolidated net profit after tax (PAT) of Rs 168.46 crore for the quarter ended June 30. The consolidated PAT of the company in the year-ago period stood at Rs 433.24 crore. The company's total income from operations was at Rs 3,249.74 crore in the first quarter of the current fiscal, and Rs 2,935.72 crore in the same period last year. Expenses were at Rs 3,582.59 crore as against Rs 2,380.14 crore earlier.

### Adani Wilmar

Adani Wilmar reported consolidated quarterly numbers, Net Sales at Rs 14,731.62 crore in June 2022 up 30.23% from Rs. 11,311.97 crore in June 2021. Quarterly Net Profit at Rs. 193.59 crore in June 2022 up 10.18% from Rs. 175.70 crore in June 2021. EBITDA stands at Rs. 495.39 crore in June 2022 up 13.94% from Rs. 434.80 crore in June 2021. Adani Wilmar EPS has decreased to Rs. 1.49 in June 2022 from Rs. 1.54 in June 2021.

### Lupin

Net loss of Lupin reported to Rs 89.08 crore in the quarter ended June 2022 as against net profit of Rs 542.46 crore during the previous quarter ended June 2021. Sales declined 14.95% to Rs 3603.96 crore in the quarter ended June 2022 as against Rs 4237.39 crore during the previous quarter ended June 2021.

### Vodafone

Vodafone Idea (Vi) net loss has remained flat year-on-year (YoY) at Rs 7,296 crore in Q1 of FY23 despite 13.7 per cent growth in revenue. In the same period last year, the company had posted a net loss of Rs 7,319 crore. However, on a sequential basis, the net loss widened by 10.6 per cent. In the fourth quarter of FY22, Vi had posted a net loss of Rs 6,563 crore. Gross revenue in the first quarter of FY23 increased by 13.7 per cent YoY to Rs 10,410 crore while earnings before interest, tax, depreciation and amortisation (Ebitda) grew 16.7 per cent to Rs 4,328 crore. Operational expenses rose 11.7 per cent YoY to Rs 6,081 crore. Average revenue per user (ARPU) improved to Rs 128, up 3.2 per cent quarter-on-quarter from Rs 124 in Q4 of FY22. Telecom companies had taken 20 per cent tariff hikes in November 2021.

### Chambal Fertilisers & Chemicals

Net profit of Chambal Fertilisers & Chemicals declined 10.38% to Rs 341.82 crore in the quarter ended June 2022 as against Rs 381.43 crore during the previous quarter ended June 2021. Sales rose 105.99% to Rs 7291.18 crore in the quarter ended June 2022 as against Rs 3539.52 crore during the previous quarter ended June 2021.

### Gulf Oil Lubricants India

Gulf Oil Lubricants India Limited has reported Standalone financial results for the period ended June 30, 2022. The reported total income of Rs. 715.6993 crores during the period ended June 30, 2022 as compared to Rs. 650.6568 crores during the period ended March 31, 2022. The company has posted net profit / (loss) of Rs. 55.3348 crores for the period ended June 30, 2022 as against net profit / (loss) of Rs. 63.3943 crores for the period ended March 31, 2022. The company has reported EPS of Rs. 11.16 for the period ended June 30, 2022 as compared to Rs. 12.35 for the period ended March 31, 2022.

### Prism Johnson

Prism Johnson reported standalone quarterly numbers, Net Sales at Rs 1,639.83 crore in June 2022 up 46.82% from Rs. 1,116.88 crore in June 2021. Quarterly Net Profit at Rs. 32.83 crore in June 2022 down 3.75% from Rs. 34.11 crore in June 2021. EBITDA stands at Rs. 155.77 crore in June 2022 up 2.68% from Rs. 151.71 crore in June 2021.

### P I Industries

Net profit of P I Industries rose 40.17% to Rs 262.40 crore in the quarter ended June 2022 as against Rs 187.20 crore during the previous quarter ended June 2021. Sales rose 29.27% to Rs 1543.20 crore in the quarter ended June 2022 as against Rs 1193.80 crore during the previous quarter ended June 2021.

### Dabur

Dabur India Ltd reported a marginal increase in its consolidated net profit at Rs 441.06 crore for the June quarter as the inflationary headwinds continued during the period. The company had posted a net profit of Rs 438.30 crore in the April-June quarter a year ago. Its revenue from operations was up 8.07 per cent at Rs 2,822.43 crore during the quarter under review as against Rs 2,611.54 crore in the corresponding period of the previous fiscal. The company said its domestic FMCG business reported a 5 per cent volume growth. Dabur India's total expenses were at Rs 2,358.52 crore, up 10.81 per cent in the June quarter. The same stood at Rs 2,128.32 crore last year. In April-June period, Dabur's consolidated revenue from the consumer care business segment was down 1.47 per cent at Rs 2,135.90 crore compared to Rs 2,167.93 crore in the year-ago period. Revenue from its retail business was up two-fold at Rs 25.67 crore from Rs 9.17 crore previous year. While revenue from other segments was up 64.43 per cent at Rs 41.98 crore as against Rs 25.53 crore in the same quarter of FY22.

### Britannia Industries

Britannia Industries on its consolidated net profit fell 13.24 per cent to Rs 335.74 crore in the April-June quarter of FY23 due to impact of inflationary headwinds. The company had posted a net profit of Rs 387.01 crore in the April-June quarter a year ago. However, its total revenue from operations increased 8.74 per cent to Rs 3,700.96 crore during the quarter under review as against Rs 3,403.46 crore in the year-ago period. Britannia Industries' total expenses were at Rs 3,293.15 crore in the first quarter of FY23, up 12.28 per cent from Rs 2,932.96 crore in the year-ago period.

### BHEL

Bharat Heavy Electricals (BHEL) reported a consolidated net loss of Rs 187.99 crore in Q1 FY23 as compared to a consolidated net loss of Rs 448.20 crore in Q1 FY22. Net sales stood at Rs 4,449.49 crore for the quarter ended 30 June 2022 as against Rs 2,723.82 crore during the same period in the previous year, registering a growth of 63.35%. BHEL posted a pre-tax loss of Rs 250.84 crore in Q1 FY23 as against a pre-tax loss of Rs 597.17 crore registered in the same quarter last year. The company's total expenditure surged 40.15% to Rs 5,006.5 crore in Q1 FY23 from Rs 3,572.12 posted in Q1 FY22. Cost of raw material consumed jumped 52.97% to Rs 1,030.77 crore in Q1 FY23 as against Rs 673.83 crore recorded in Q1 FY22. Power business sales stood at Rs 3,526.20 crore, up by 66.57% YoY while industry segment sales was at Rs 923.29 crore higher by 52.13% YoY.

### **Berger Paints India**

Net profit of Berger Paints India rose 80.26% to Rs 253.43 crore in the quarter ended June 2022 as against Rs 140.59 crore during the previous quarter ended June 2021. Sales rose 53.45% to Rs 2759.70 crore in the quarter ended June 2022 as against Rs 1798.49 crore during the previous quarter ended June 2021.

### **Cera Sanitaryware**

Cera Sanitaryware reported 3 times rise in standalone net profit to Rs 39.6 crore in Q1 FY23 from Rs 12.9 crore in Q1 FY22. Revenue from operations increased by 77.6% YoY to Rs 395.8 crore during the quarter. EBITDA surged to Rs 61.2 crore in the first quarter from Rs 19.8 crore recorded in the same period last year. EBITDA margin was 15.5% in Q1 FY23 as against 8.9% in Q1 FY22.

### **Balrampur Chini Mills**

Balrampur Chini Mills Ltd reported 84 per cent fall in consolidated net profit at Rs 12.38 crore for the quarter ended June. Its net profit stood at Rs 76.92 crore in the year-ago period. Total income fell to Rs 1,094.58 crore in the quarter from Rs 1,145.68 crore in the corresponding period of the previous year. Total expenses rose to Rs 1,077.72 crore during April-June 2022-23 from Rs 1,048.83 crore in the year-ago period.

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

Company	Details
Sanofi India Ltd	Cash dividend of INR193 effective 05-08-2022
Century Enka Ltd	Cash dividend of INR10 effective 05-08-2022
Dr Lal PathLabs Ltd	Cash dividend of INR6 effective 05-08-2022
Compugae Infocom Ltd	Cash dividend of INR0.20 effective 05-08-2022
Subros Ltd	Corporate meeting effective 05-08-2022
Akzo Nobel India Ltd	Corporate meeting effective 05-08-2022
Mahindra & Mahindra Ltd	Corporate meeting effective 05-08-2022
Graphite India Ltd	Corporate meeting effective 05-08-2022
eMudhra Ltd	Corporate meeting effective 05-08-2022
Fineotex Chemical Ltd	Corporate meeting effective 05-08-2022
Coral India Finance & Housing Ltd	Corporate meeting effective 05-08-2022
Flex Foods Ltd	Corporate meeting effective 05-08-2022
NIIT Ltd	Corporate meeting effective 05-08-2022
Marico Ltd	Corporate meeting effective 05-08-2022

### Domestic Events

- India Foreign Exchange Reserve for July 29, 2022.

### Global Events

- The Reserve Bank Of India Interest Rate Decision.
- China Current Account Balance Prel for Q2 2022.
- Japan Leading Economic Index for June 2022.
- The U.S. Unemployment Rate for July 2022.

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