

Market Snapshot

KEY INDICES	This Week	Previous Week	Change%
S&P CNX Nifty	11,075.90	10,946.20	1.18
Sensex	37,384.99	36,981.77	1.09
NIFTY MIDCAP 100	15,967.40	15,606.95	2.31
NIFTY SML CAP 100	5,618.70	5,444.50	3.20

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	This Week	Previous Week	Change%
NIFTY FMCG	28,592.05	28,649.75	-0.20
NIFTY BANK	28,098.75	27,247.90	3.12
NIFTY REALTY	268.10	254.30	5.43
NIFTY AUTO	7,360.60	7,102.45	3.63
NIFTY PHARMA	8,033.05	8,068.75	-0.44
NIFTY IT	15,722.90	16,034.55	-1.94
NIFTY METAL	2,444.10	2,357.70	3.66
BSE Cons Durab	23,587.31	22,921.16	2.91
BSECap Goods	17,422.54	16,962.61	2.71
BSEPower	1,943.52	1,924.24	1.00
BSE Oil	13,639.34	13,370.16	2.01

(Source: Investing.com)

Sensex Gainers - Weekly

SCRIPS	This Week	Previous Week	Change%
Yes Bank Ltd	68.6	60.4	13.58
Tata Motors-DVR	59.65	54.9	8.65
Tata Motors Ltd	129.55	121.1	6.98
State Bank of India	291.7	273.95	6.48
ICICI Bank Ltd	413.25	391.5	5.56

(Source: Capitaline)

Nifty regains 11,000

Key indices settled with steady gains in the holiday-shortened week. Upmove was triggered by hopes of interest rate cut by the Reserve Bank of India. Signs of progress in US-China trade talks and aggressive stimulus from the European Central Bank also supported gains. The Nifty finished below 11,000 mark. Mid-Cap and Small-Cap stocks outperformed the Sensex. The Sensex rose 403.22 points or 1.09% to settle at 37,384.99. The Nifty 50 index rose 129.70 points or 1.18% to settle at 11,075.90. The BSE Mid-Cap index rose 300.96 points or 2.25% to settle at 13,665.59. The BSE Small-Cap index rose 418.46 points or 3.32% to settle at 13,013.05.

The Society of Indian Automobile Manufacturers (SIAM) announced the automobile industry sales figures for August 2019. According to SIAM, all vehicle categories witnessed decline in sales during the month. Vehicle sales across categories registered a decline of 23.55% to 18,21,490 units from 23,82,436 units in August 2018, it added. Domestic car sales were down 41.09% to 1,15,957 units as against 1,96,847 units in August 2018. Total two-wheeler sales in August declined 22.24% to 15,14,196 units compared to 19,47,304 units in the year-ago month. Sales of commercial vehicles were down 38.71% to 51,897 units in August.

Fitch Ratings cut its forecast for India's economic growth at 6.6% during the current year, down from 6.8% in the previous year, and said the government has only limited room to ease fiscal policy because of high debt. It said GDP growth is likely to rebound to 7.1% next year.

India's industrial production improved 4.3% in July 2019, while showing acceleration in growth from four-month low of 1.2% in June 2019. The all-India general CPI inflation was nearly steady at 3.21% in August 2019 (new base 2012=100), compared with 3.15% in July 2019.

Overseas, Fed Chairman Jerome Powell described the U.S. economy and labor market as healthy, speaking at a question-and-answer in Switzerland after the jobs report.

The Labor Department said the U.S. economy added 130,000 jobs in August, down from the 159,000 jobs added

Sensex Losers - Weekly

SCRIPS	This Week	Previous Week	Change%
HCL Technologies Ltd	1069.2	1101.5	-2.93
TCS	2141.35	2197.65	-2.56
NTPC Ltd	124.05	127	-2.32
Bharti Airtel Ltd	342.75	349.2	-1.85
Tech Mahindra Ltd	709.15	721.55	-1.72

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	This Week	Previous Week	Change%
Yes Bank Ltd	68.55	60.4	13.49
BPCL	408.55	379	7.80
Tata Motors Ltd	129.55	121.25	6.85
State Bank of India	291.7	273.95	6.48
HINDALCO	200.35	188.4	6.34

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	This Week	Previous Week	Change%
ZEEL	350.5	361.25	-2.98
HCL Technologies Ltd	1068.5	1100.4	-2.90
Wipro Ltd	245.35	252	-2.64
TCS	2141.95	2197.5	-2.53
NTPC Ltd	124.05	127	-2.32

(Source: Capitaline)

Nifty Midcap 100 Gainers - Weekly

SCRIPS	This Week	Previous Week	Change%
Wockhardt	314.65	238.4	31.98
Jindal Steel	108.8	95.6	13.81
Tata Power Co.	64.3	58	10.86
M R P L	51.65	46.65	10.72
Adani Power	64.6	58.35	10.71

in July. The unemployment rate remained steady at 3.7%.

Back home, top gainer on NSE and BSE was Yes bank after media reports indicated that mobile payments major Paytm-owner One97 Communications is in discussions for a deal to pick up a stake in Yes Bank. Top loser on NSE was Zeel and top loser on BSE was HCLTech.

Amongst midcap stocks top gainer was Wockhardt. Top loser was Reliance Nippon life after IRDAI warns the company over expenditure surging past limit. The insurer had incurred expenses of Rs 1,632 cr against the cap of Rs 1,069 Cr.

Sectoral indices gainer was Nifty Realty led by Oberoi Realty. Top loser was Nifty IT due to Oracle over disappointing quarterly numbers.

Outlook and Technical View

In the forthcoming week ahead, spotlight will be on policy meetings at the US Fed and the Bank of Japan (BoJ). Global cues, macroeconomic data, progress of monsoon, movement of rupee against the dollar, Brent crude oil price movement and investments by foreign portfolio investors (FPI) and domestic institutional investors (DII) will also be watched.

From the technical standpoint, Nifty may find support at 10986, 10896, 10847 while levels of 11124, 11174, 11263 may act as resistance with pivot point at 11035.

(Source: Capitaline)

FII & DII Activities (Rs Crore)

06/09/2019 to 13/09/2019

Activities	FIIs	DIIIs
Buy	22625.61	16613.87
Sell	20808.4	13505.04
Net	1817.21	3108.83

(Source: Capitaline)

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	This Week	Previous Week	Change%
Reliance Nip.Lif	262.25	282.9	-7.30
Glenmark Pharma.	368.85	391.25	-5.73
L & T Infotech	1606.55	1694.4	-5.18
Oracle Fin.Serv.	2945.15	3044.1	-3.25
Aditya Bir. Fas.	189.25	194.3	-2.60

(Source: Capitaline)

World Markets

KEY INDICES	This Week	Previous Week	Change%
DJIA	27219.52	26797.46	1.58
Nasdaq	8176.72	8103.07	0.91
Nikkei 225	21988.29	21199.57	3.72
Straits Times	3211.49	3144.48	2.13
Hang Seng	27352.69	26690.76	2.48
FTSE 100	7367.46	7282.34	1.17
DAX	12468.53	12191.73	2.27
ShanghaiComposite	3031.24	2999.6	1.05
CAC 40	5,655.46	5,603.99	0.92
Bovespa	103,501.18	102,935.43	0.55
Moex Russia	2,791.74	2,797.55	-0.21
Jakarta	6,334.84	6,308.95	0.41

(Source: Capitaline, [investing.com](https://www.investing.com))

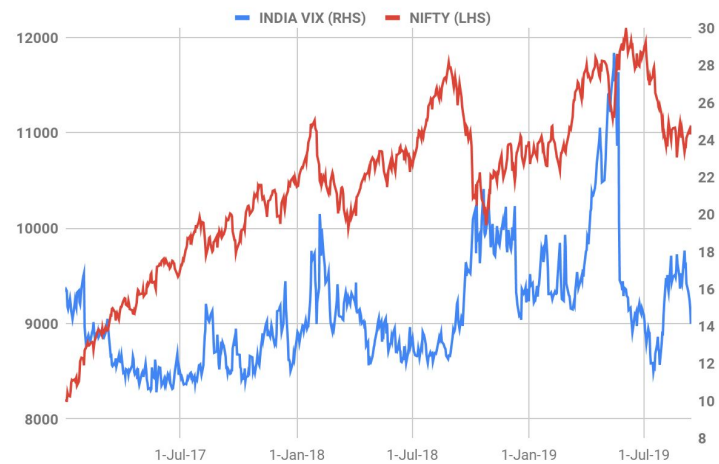
Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Previous LTP	Change	Premium/dis. Over Spot	Open Interest	Prev. Open Interest	Change in OI
NIFTY	26-Sep-19	11114.50	10968.00	1.34%	38.60	223710	228842	-2.24%
BANKNIFTY	26-Sep-19	28170.00	27292.00	3.22%	71.25	79705	79944	-0.30%

(Source: [NSE](https://www.nse.com))

Nifty Vs. INDIA VIX



(Source: [NSE](https://www.nse.com))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
M&MFIN	334.90	339.30	26-Sep-19	39.96%
GRASIM	717.55	721.85	26-Sep-19	18.23%
GMRINFRA	17.05	17.15	26-Sep-19	17.84%
BHEL	51.65	51.95	26-Sep-19	17.67%
TORNTPOWER	280.30	281.90	26-Sep-19	17.36%
NATIONALUM	44.75	45.00	26-Sep-19	16.99%
COALINDIA	198.20	199.30	26-Sep-19	16.88%
RAYMOND	584.65	587.65	26-Sep-19	15.61%
PFC	111.25	111.80	26-Sep-19	15.04%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IBULHSGFIN	442.25	421.65	26-Sep-19	-141.68%
JUSTDIAL	728.55	722.80	26-Sep-19	-24.01%
AMARAJABAT	648.55	645.60	26-Sep-19	-13.84%
IDFCFIRSTB	42.30	42.15	26-Sep-19	-10.79%
RBLBANK	371.15	369.85	26-Sep-19	-10.65%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	59008075	44030250	1.34

(Source: Capitaline)

The Following Stocks displayed surge in Volume during the week and can be one of the triggers for deciding trading/investment stocks:

- | | | |
|--------------------|----------------|--------------------|
| 1. Yes Bank | 2. SAIL | 3. Bank of Baroda |
| 4. GMR Infra | 5. SBI | 6. IDFC First Bank |
| 7. IOC | 8. L&T Finance | 9. ONGC |
| 10. Motherson Sumi | 11. Union Bank | 12. ITC |
| 13. Axis Bank | 14. GAIL | 15. BPCL |
| 16. IDBI Bank | | |

(Source: [Moneycontrol](#))

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