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Particulars	Nifty	Sensex
52 Wk High	11171.55	36443.98
52 Wk Low	8860.10	28716.21
Close	10458.35	34046.94

Currency Update		
	CMP	Net Change
USDINR	65.37	0.98%
EURINR	79.77	0.20%

Institutional Activity ( Cr.)		
	FII	DII
Week	-3535.04	5972.69
Month (March)	241.85	-3.29
Year (2018)	-6759.52	17341.17

Primary Market Update		
Company	Date	Price Band

**Market Outlook**

**THE WEEK THAT WAS**

Stocks end truncated week with small losses

Domestic stock markets logged small losses in the truncated trading week. Gains triggered by better-than-expected domestic economic growth were offset by losses due to negative global stocks. Indices edged lower in three out of four trading sessions of the week.

In the week ended Thursday, 1 March 2018, the Sensex fell 95.21 points or 0.28% to settle at 34,046.94, its lowest closing level since 22 February 2018. The Nifty 50 index fell 32.70 points or 0.31% to settle at 10,458.35, its lowest closing level since 22 February 2018.

The S&P BSE Mid-Cap index rose 0.56 points to settle at 16,562.59. The S&P BSE Small-Cap index gained 131.71 points or 0.73% to settle at 18,127.93. Both these indices outperformed the Sensex.

Domestic stocks suffered modest losses on Tuesday, 27 February 2018 in a volatile session of trade. The barometer index, the S&P BSE Sensex, fell 99.36 points or 0.29% to settle at 34,346.39. The Nifty 50 index fell 28.30 points or 0.27% to settle at 10,554.30.

On the macro front, India's Gross Domestic Product (GDP) growth further accelerated to 7.2% in Q3 December 2017, showing improvement from 6.5% growth in the preceding last quarter and 6.8% in the corresponding quarter last year. The GDP growth stood at 6.4% in April-December 2017, compared with 7.5% recorded in the corresponding period last year. The GDP growth estimate for 2017-18 has been revised upwards to 6.6% at second advances estimates level from 6.5% at first advance estimate level released in early January 2018.

**WEEK AHEAD**

Domestic, global macroeconomic data to provide direction

Domestic and global macroeconomic data, developments in the Budget Session of Parliament, trend in global markets, investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs), the movement of rupee against the dollar and crude oil price movement will dictate the trend on the bourses next week.

Developments in the Budget Session of Parliament will be closely watched. The Budget Session of Parliament commenced on 29 January 2018 and subject to exigencies of government business, will be adjourned sine die on 6 April 2018. Both the Houses of Parliament were adjourned on 9 February 2018 for recess for a period of 23 days and will reassemble on Monday, 5 March 2018. During the recess, the Departmentally related Standing Committees will examine the Demands for Grants relating to various Ministries/Departments.

On the domestic macro front, Markit Economics will unveil the result of a monthly survey on the performance of India's services sector in February 2018 on Monday, 5 March 2018. The Nikkei Services PMI in India increased to 51.7 in January 2018, from 50.9 in the prior month.

On the global macro front, data on Caixin China Composite PMI for February 2018 and Caixin China Services PMI for February 2018 will be announced on Monday, 5 March 2018. Data on Japan Nikkei Services PMI for February 2018 will be announced on Monday, 5 March 2018. Also the data on US Markit Composite PMI for February 2018 and US Markit Services PMI for February 2018 will be announced on Monday, 5 March 2018.

**Technical View**

**Nifty Outlook (10458) :** Nifty staged a smart come back and just missed the 10,650 mark by a small margin. During the last week Nifty has made a lower bottom formation and given a correction from 10631 to 10447 and closed above 100 DEMA of 10420. Its immediate support is likely to be seen around 10320. If it closes below this, next support is likely to be seen around 10220. Its resistance is likely to be seen around 10550 to 10630 for next week.

**Bank Nifty Outlook (24902) :** During the last week Bank Nifty has made a high of 25723 and given a correction from this level up to 24554. Its immediate support is likely to be seen around 24650 and 24200. Its resistance is likely to be seen around 25400 to 25650 for next week.

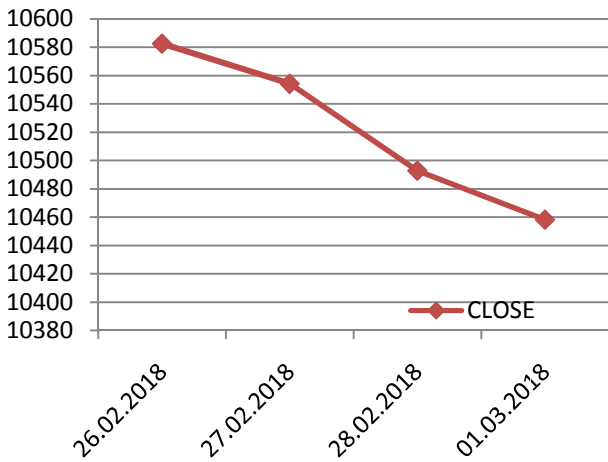
**USDINR Outlook (65.37) :** During the last week USDINR has given a rally from 64.46 to 65.14 and closed at 200 DEMA of 64.75. Its immediate support is likely to be seen around 64.60 and 64.30 for next week. Its resistance is likely to be seen around 65.10 and 65.30 for next week.

**EURINR Outlook (79.77) :** During the last week EURINR has made a lower top formation and given a correction from 80.47 to 79.56. Its support is likely to be seen around 79.40. Closes below this level next support is likely to be seen around 78.75. Its resistance is likely to be seen around 80 and 80.50 for next week.

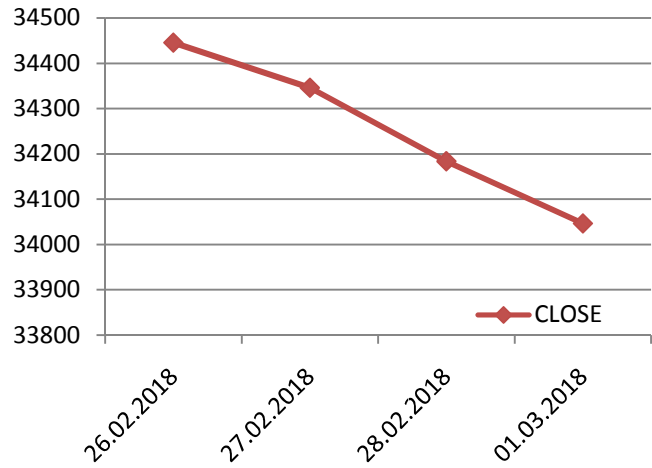
**Dollar Index Outlook (89.90) :** During the last week DX has given a bounce from 88.86 to 90.17 and closed above 20 DEMA of 89.65. Its support is likely to be seen around 89.50 and 89 for next week. Its resistance is likely to be seen around 90.30 and 90.70 for next week.

## CASH MARKET DATA

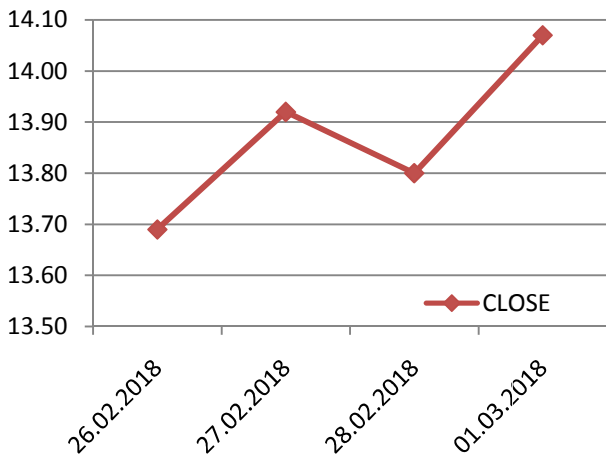
### Nifty



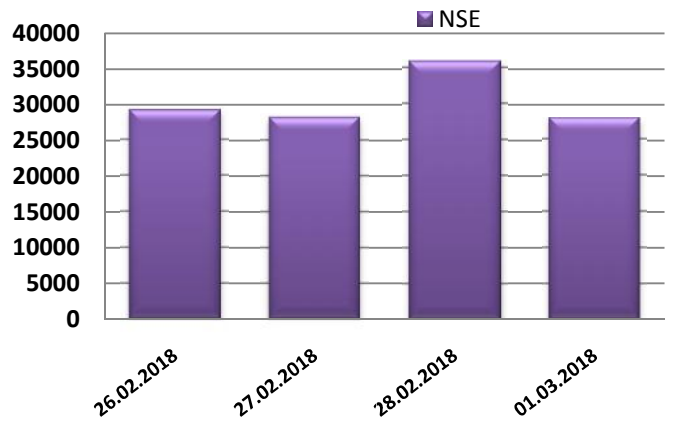
### Sensex



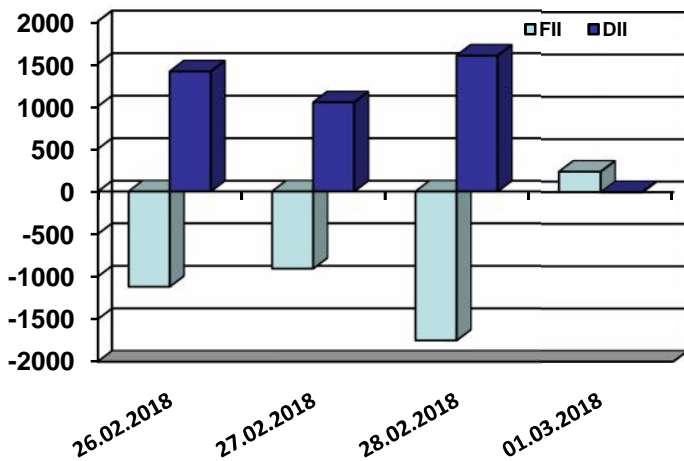
### VIX



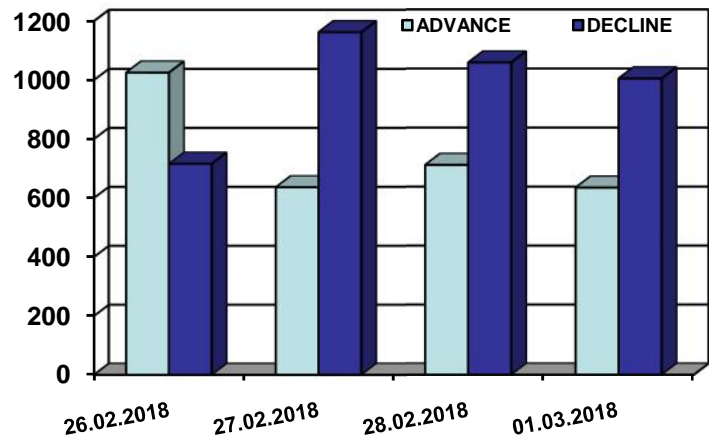
### Turnover (Rs. Cr.)



### FII/DII (Cr)



### Advance/Dcline



## WEEKLY CHANGE IN MARKET INDICATORS

Indices	01.03.2018	23.02.2018	Chg (Pts)	% Chg
NIFTY	10458.00	10491.05	-33.05	-0.32%
SENSEX	34046.94	34142.15	-95.21	-0.28%
BSEMIDCAP	16461.25	16562.02	-100.77	-0.61%
BSESMLCAP	18084.94	17996.22	88.72	0.49%
BSE-100	10821.15	10856.54	-35.39	-0.33%
BSE-200	4572.00	4585.60	-13.60	-0.30%
BSE-IPO	4982.45	4980.25	2.20	0.04%

## WEEKLY CHANGE IN SECTOR INDICES

Indices	01.03.2018	23.02.2018	Chg (Pts)	% Chg
* BSE AUTO INDEX	24819.30	24327.52	491.78	2.02%
* BSE BANKEX	28072.19	28535.80	-463.61	-1.62%
* BSE CAPITAL GOODS	19026.68	18890.97	135.71	0.72%
* BSE CONSUMER DUR	21036.16	20968.96	67.20	0.32%
* BSE FMCG INDEX	10515.05	10562.66	-47.61	-0.45%
* BSE HEALTHCARE	14031.54	14225.36	-193.82	-1.36%
* BSE IT SECTOR	12439.92	12504.84	-64.92	-0.52%
* BSE METAL INDEX	15030.15	15327.90	-297.75	-1.94%

## WEEKLY CHANGE IN WORLD INDICES

Indices	01.03.2018	23.02.2018	Chg (Pts)	% Chg
DOW JONES	24538.07	25309.99	-771.92	-3.05%
NASDAQ COMPOSITE	7257.87	7337.39	-79.52	-1.08%
FTSE	7069.90	7244.41	-174.51	-2.41%
NIKKEI	21181.65	21892.77	-711.12	-3.25%
BOVESPA	85761.35	87293.24	-1531.89	-1.75%
HANG SENG	30583.45	31267.16	-683.71	-2.19%

## PRIMARY MARKET UPDATES

Company	Issue Size (Cr)	Open	Close	Offer Price
-	-	-	-	-

## 52 WEEKS HIGH/LOW

Scrip	Rate	H/L	Prev H/L on
IPCALAB	691.7	H	1-Mar-18
FSL	54.2	H	1-Mar-18
FLFL	424	H	1-Mar-18
MAXINDIA	95.5	L	1-Mar-18
BALRAMCHIN	105.3	L	6-Feb-18
SMLISUZU	787.3	L	6-Feb-18
IDFCBANK	50.25	L	6-Feb-18
ICRA	3751.5	L	6-Feb-18
BGREENERGY	115.05	L	6-Feb-18
TATAMTRDVR	198.75	L	6-Feb-18

## ALL TIME HIGH/LOW

Scrip	Rate	H/L	Prev H/L on
FLFL	424	H	1-Mar-18
CUB	183.9	H	14-Jun-17
AARTIIND	1175	H	15-Feb-18
MRF	73566.6	H	26-Dec-17
INDIGO	1350	H	27-Feb-18
BHARATFORG	785	H	28-Feb-18
GODREJCP	1083.7	H	28-Feb-18
MAXINDIA	95.5	L	1-Mar-18
BSE	795.05	L	6-Feb-18
UNITEDBNK	13.45	L	28-Feb-18

## INCREASE IN OPEN INTEREST

Expiry Date	Last Price	Chg (Rs)	Chg (%)	Open Interest	MWPL Reached (%)	Change in OI (%)
28-Mar-18	78.35	-2.95	-3.63%	108924000	5880000	5.71%
28-Mar-18	353.25	-18.25	-4.91%	74002500	4656000	6.71%
28-Mar-18	304.8	-0.95	-0.31%	78314500	4501750	6.10%
28-Mar-18	27.8	-0.20	-0.71%	98784000	4172000	4.41%
28-Mar-18	119.8	-7.90	-6.19%	37662000	2562000	7.30%

## DECREASE IN OPEN INTEREST

Symbol	Expiry Date	Last Price	Chg (Rs)	Chg (%)	Open Interest	MWPL Reached (%)	Change in OI (%)
JPASSOCIAT	28-Mar-18	17	-0.40	-2.30%	206788000	-21080000	-9.25%
IDBI	28-Mar-18	84.25	3.50	4.33%	56680000	-9450000	-14.29%
AXISBANK	28-Mar-18	523.6	-2.10	-0.40%	46773600	-5269200	-10.12%
HDIL	28-Mar-18	47.2	-0.95	-1.97%	36198000	-2259000	-5.87%
ASHOKLEY	28-Mar-18	140.55	-0.70	-0.50%	55314000	-1617000	-2.84%

## INCREASE IN OI IN CALLS

Symbol	Expiry Date	Option Type	Strike Price	Last Price	Turnover Premium (Lacs)	Open Interest	Open Int Chg
SAIL	28-Mar-18	CE	85	1.3	170.23	5712000	1128000
RCOM	28-Mar-18	CE	30	1.3	190.19	12208000	784000
PNB	28-Mar-18	CE	110	3.25	485.29	9748000	312000
SUZLON	28-Mar-18	CE	12.5	0.6	55.74	5390000	1680000
IDBI	28-Mar-18	CE	85	6.8	593.47	11760000	-560000

## INCREASE IN OI IN PUTS

Symbol	Expiry Date	Option Type	Strike Price	Last Price	Turnover Premium (Lacs)	Open Interest	Open Int Chg
SAIL	28-Mar-18	PE	75	1.95	227.58	3648000	1116000
PNB	28-Mar-18	PE	90	3.5	256.17	9028000	-720000
ICICIBANK	28-Mar-18	PE	300	7.15	497.63	2035000	101750
SBIN	28-Mar-18	PE	260	7.4	394.27	2205000	33000
JINDALSTEL	28-Mar-18	PE	230	7.25	457.22	873000	387000

## LEVELS FOR NIFTY STOCKS

Security Name	HBP	2R	1R	CLOSE	ATP	1S	2S	LBP	Up/Down
ADANIPTS	420.32	417.03	411.57	406.10	408.28	402.82	399.53	394.07	DOWN
AMBUJACEM	260.72	258.48	255.82	253.15	253.58	250.92	248.68	246.02	DOWN
ASIANPAINT	1142.27	1133.23	1126.07	1118.90	1117.03	1109.87	1100.83	1093.67	UP
AUROPHARMA	642.73	635.37	629.73	624.10	622.37	616.73	609.37	603.73	UP
AXISBANK	547.08	541.32	533.53	525.75	527.77	519.98	514.22	506.43	DOWN
BAJAJ-AUTO	3136.53	3108.27	3064.58	3020.90	3036.32	2992.63	2964.37	2920.68	DOWN
BAJFINANCE	1712.23	1689.12	1674.23	1659.35	1651.12	1636.23	1613.12	1598.23	UP
BPCL	460.83	452.37	447.13	441.90	438.67	433.43	424.97	419.73	UP
BHARTIARTL	445.17	440.88	434.32	427.75	430.03	423.47	419.18	412.62	DOWN
INFRATEL	360.80	356.50	350.85	345.20	346.55	340.90	336.60	330.95	DOWN
BOSCHLTD	18921.69	18840.67	18774.09	18707.50	18693.07	18626.49	18545.47	18478.89	UP
CIPLA	603.77	598.83	590.27	581.70	585.33	576.77	571.83	563.27	DOWN
COALINDIA	321.52	317.83	315.37	312.90	311.68	309.22	305.53	303.07	UP
DRREDDY	2295.85	2267.80	2249.65	2231.50	2221.60	2203.45	2175.40	2157.25	UP
EICHERMOT	28786.83	28393.92	28068.13	27742.35	27675.22	27349.43	26956.52	26630.73	UP
GAIL	464.52	461.38	457.82	454.25	454.68	451.12	447.98	444.42	DOWN
HCLTECH	965.28	958.87	950.83	942.80	944.42	936.38	929.97	921.93	DOWN
HDFC	1838.93	1828.72	1821.43	1814.15	1811.22	1803.93	1793.72	1786.43	UP
HDFCBANK	1914.40	1903.85	1889.10	1874.35	1878.55	1863.80	1853.25	1838.50	DOWN
HEROMOTOCO	3625.98	3611.47	3594.18	3576.90	3579.67	3562.38	3547.87	3530.58	DOWN
HINDPETRO	388.60	385.85	381.30	376.75	378.55	374.00	371.25	366.70	DOWN
HINDALCO	253.53	250.27	245.53	240.80	242.27	237.53	234.27	229.53	DOWN
HINDUNILVR	1345.50	1337.25	1330.75	1324.25	1322.50	1316.00	1307.75	1301.25	UP
ICICIBANK	320.97	317.48	311.22	304.95	307.73	301.47	297.98	291.72	DOWN
IBULHSGFIN	1297.87	1285.03	1270.67	1256.30	1257.83	1243.47	1230.63	1216.27	DOWN
IOC	388.72	385.73	383.62	381.50	380.63	378.52	375.53	373.42	UP
INDUSINDBK	1750.48	1729.72	1715.03	1700.35	1694.27	1679.58	1658.82	1644.13	UP
INFY	1181.77	1175.68	1168.22	1160.75	1162.13	1154.67	1148.58	1141.12	DOWN
ITC	269.03	267.57	265.78	264.00	264.32	262.53	261.07	259.28	DOWN
KOTAKBANK	1122.05	1112.90	1104.30	1095.70	1095.15	1086.55	1077.40	1068.80	UP
LT	1347.50	1340.20	1327.70	1315.20	1320.40	1307.90	1300.60	1288.10	DOWN
LUPIN	839.95	832.10	818.00	803.90	810.15	796.05	788.20	774.10	DOWN
M&M	745.87	741.18	736.87	732.55	732.18	727.87	723.18	718.87	UP
MARUTI	9060.58	8998.32	8935.88	8873.45	8873.62	8811.18	8748.92	8686.48	DOWN
NTPC	165.58	164.67	163.83	163.00	162.92	162.08	161.17	160.33	UP
ONGC	193.67	191.93	190.82	189.70	189.08	187.97	186.23	185.12	UP
POWERGRID	201.70	200.10	198.75	197.40	197.15	195.80	194.20	192.85	UP
RELIANCE	970.83	965.37	956.88	948.40	951.42	942.93	937.47	928.98	DOWN
SBIN	276.43	273.22	267.68	262.15	264.47	258.93	255.72	250.18	DOWN
SUNPHARMA	548.43	544.97	540.18	535.40	536.72	531.93	528.47	523.68	DOWN
TATAMOTORS	382.27	379.28	375.02	370.75	372.03	367.77	364.78	360.52	DOWN
TATASTEEL	698.30	691.65	683.35	675.05	676.70	668.40	661.75	653.45	DOWN
TCS	3100.47	3080.83	3059.27	3037.70	3039.63	3018.07	2998.43	2976.87	DOWN
TECHM	627.03	621.47	616.68	611.90	611.12	606.33	600.77	595.98	UP
ULTRACEMCO	4227.13	4203.57	4178.43	4153.30	4154.87	4129.73	4106.17	4081.03	DOWN
UPL	748.60	740.75	727.50	714.25	719.65	706.40	698.55	685.30	DOWN
VEDL	342.65	338.15	330.70	323.25	326.20	318.75	314.25	306.80	DOWN
WIPRO	296.90	295.50	294.00	292.50	292.60	291.10	289.70	288.20	DOWN
YESBANK	332.90	329.45	325.25	321.05	321.80	317.60	314.15	309.95	DOWN
ZEEL	582.97	575.93	565.67	555.40	558.63	548.37	541.33	531.07	DOWN

## COPRPORATE ACTION

Symbol	Series	Face Value(Rs.)	Purpose	Ex-Date	Record Date	BC Start Date	BC End Date
BALRAMCHIN	EQ	1	Buyback	5-Mar-18	6-Mar-18	-	-
TVSMOTOR	EQ	1	Interim Dividend - Rs 1.30 Per Share (Purpose Revised)	6-Mar-18	7-Mar-18	-	-
PFC	EQ	10	Interim Dividend - Rs 1.80 Per Share (Purpose Revised)	6-Mar-18	7-Mar-18	-	-
KPRMILL	EQ	5	Buyback	6-Mar-18	7-Mar-18	-	-
DCMSHRIRAM	EQ	2	Interim Dividend - Rs 3.40 Per Share	7-Mar-18	8-Mar-18	-	-
CESC	EQ	10	Interim Dividend - Rs 12 Per Share (Purpose Revised)	8-Mar-18	9-Mar-18	-	-
STAN	DR	-	Dividend	8-Mar-18	9-Mar-18	-	-
IDFCBANK	HD	5000	Interest Payment	8-Mar-18	9-Mar-18	-	-
HUDCO	EQ	10	Interim Dividend - Re 0.55 Per Share (Purpose Revised)	8-Mar-18	9-Mar-18	-	-

## NEXT WEEK MAJOR ECONOMIC EVENTS

Time	Cur.	Imp.	Event	Forecast	Previous
<b>Monday, March 5, 2018</b>					
3:30:00 AM	EUR		Italian General Election		
3:00:00 PM	GBP		Services PMI (Feb)	53.3	53
8:30:00 PM	USD		ISM Non-Manufacturing PMI (Feb)	58.9	59.9
<b>Tuesday, March 6, 2018</b>					
6:00:00 AM	AUD		Retail Sales (MoM) (Jan)	0.40%	-0.50%
9:00:00 AM	AUD		RBA Interest Rate Decision (Mar)	1.50%	1.50%
9:00:00 AM	AUD		RBA Rate Statement		
8:30:00 PM	CAD		Ivey PMI (Feb)	56.3	55.2
<b>Wednesday, March 7, 2018</b>					
6:00:00 AM	AUD		GDP (QoQ) (Q4)	0.50%	0.60%
6:00:00 PM	GBP		Annual Budget Release		
6:45:00 PM	USD		ADP Nonfarm Employment Change (Feb)	195K	234K
8:30:00 PM	CAD		BoC Interest Rate Decision	1.25%	1.25%
9:00:00 PM	USD		Crude Oil Inventories		3.019M
<b>Thursday, March 8, 2018</b>					
All Day		Holiday	Russia - Women's Day		
5:20:00 AM	JPY		GDP (QoQ) (Q4)	0.20%	0.10%
6:15:00 PM	EUR		Deposit Facility Rate	-0.40%	-0.40%
6:15:00 PM	EUR		ECB Interest Rate Decision (Mar)	0.00%	0.00%
7:00:00 PM	EUR		ECB Press Conference		
9:30:00 PM	CAD		BoC Gov Poloz Speaks		
<b>Friday, March 9, 2018</b>					
Tentative	JPY		BoJ Monetary Policy Statement (YoY)		
Tentative	JPY		BoJ Press Conference		
3:00:00 PM	GBP		Manufacturing Production (MoM) (Jan)	0.20%	0.30%
7:00:00 PM	USD		Nonfarm Payrolls (Feb)	204K	200K
7:00:00 PM	USD		Unemployment Rate (Feb)	4.00%	4.10%
7:00:00 PM	CAD		Employment Change (Feb)	17.5K	-88.0K

# **Tradeswift**

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