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Particulars	Nifty	Sensex
52 Wk High	11171.55	36443.98
52 Wk Low	8860.10	28716.21
Close	10491.05	34142.15

Currency Update		
	CMP	Net Change
USDINR	64.73	0.71%
EURINR	79.61	-0.79%

Institutional Activity ( Cr.)		
	FII	DII
Week	-5781.98	5972.69
Month (Feb)	-14842.26	13760
Year (2018)	-3224.48	13291.45

Primary Market Update		
Company	Date	Price Band
H.G. Infra Engineering Ltd	26 Feb To 28 Feb 2018	263 - 270

**Market Outlook**

**THE WEEK THAT WAS**

Market wraps week with modest gains

Key indices clocked modest gains in the week just gone by as recovery materialized towards the end of the week supported by firm global stocks. Initial losses in the week were triggered by last week's detection of a massive fraud at a Mumbai branch of the state-run Punjab National Bank (PNB) and loan fraud case by now defunct Rotomac Pens. The Sensex regained psychological 34,000-mark after falling below that mark during the fortnight. The market dropped in three out of five sessions of the week.

The MPC noted that the inflation outlook is clouded by several uncertainties on the upside. There is, therefore, need for vigilance around the evolving inflation scenario in the coming months, it added.

Among global data, an index that tracks US manufacturers rose to a nearly 3½-year high in February and a gauge for service-oriented companies hit a six-month peak, according to IHS Markit's flash PMI. The manufacturing index rose to 55.9 from 55.5. The services barometer climbed to 55.9 from 53.3.

**WEEK AHEAD**

Macroeconomic data to dictate trend

The macroeconomic data, investments by foreign portfolio investors (FPIs), the movement of rupee against the dollar and crude oil price movement will dictate trend in a truncated trading week. The stock markets remain close on Friday, 2 March 2018, on account of Holi.

Auto stocks will be in focus as the auto companies will start announcing monthly sales numbers for February 2018 starting from Thursday, 1 March 2018.

Markit Economics will unveil the results of a monthly survey on the performance of India's manufacturing sector for February 2018 at 10:30 IST on Wednesday, 28 February 2018. The Nikkei India Manufacturing Purchasing Managers' Index, or PMI, had fallen to 52.4 in January 2018, reflecting a slower growth after the index reached a 5-year high at 54.7 in December 2017.

The government will announce data on third quarter gross domestic product (GDP) on Wednesday, 28 February 2018. GDP growth had recovered to 6.3% in Q2 September 2017 from 5.7% recorded in Q1 June 2017.

On the global front, data on Caixin China General Manufacturing PMI for February 2018, IHS Markit Eurozone Manufacturing PMI for February and IHS Markit US Manufacturing PMI for February indicating health of the manufacturing activity in respective regions for that month, will be announced on Thursday, 1 March 2018.

In US, the data on new home sales measuring the number of newly constructed homes with a committed sale during January 2018, will be announced on Monday, 26 February 2018. Q4 December 2017 GDP data and pending home sales data for January will be unveiled on Wednesday, 28 February 2018.

**Technical View**

**Nifty Outlook (10491)** : Nifty staged a smart come back and just missed the 10,500 mark by a small margin. During the last week Nifty has made a higher bottom formation and given a bounce from 10340 to 10499 and closed above 100 DEMA of 10411. Its immediate support is likely to be seen around 10410. Closes below this level next support is likely to be seen around 10270. Its resistance is likely to be seen around 10550 to 10630 for next week.

**Bank Nifty Outlook (25302)** : During the last week Bank Nifty has made a low of 24781 and given a bounce from this level up to 25345. Its immediate support is likely to be seen around 24050 and 24800. Its resistance is likely to be seen around 25400 to 25650 for next week.

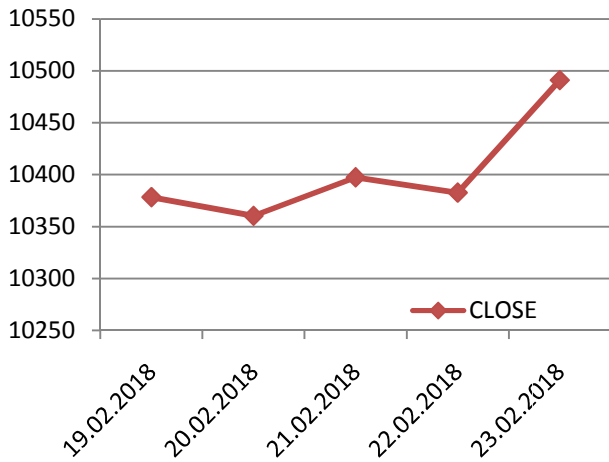
**USDINR Outlook (64.73)** : During the last week USDINR has given a rally from 64.46 to 65.14 and closed at 200 DEMA of 64.75. Its immediate support is likely to be seen around 64.60 and 64.30 for next week. Its resistance is likely to be seen around 65.10 and 65.30 for next week.

**EURINR Outlook (79.61)** : 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.

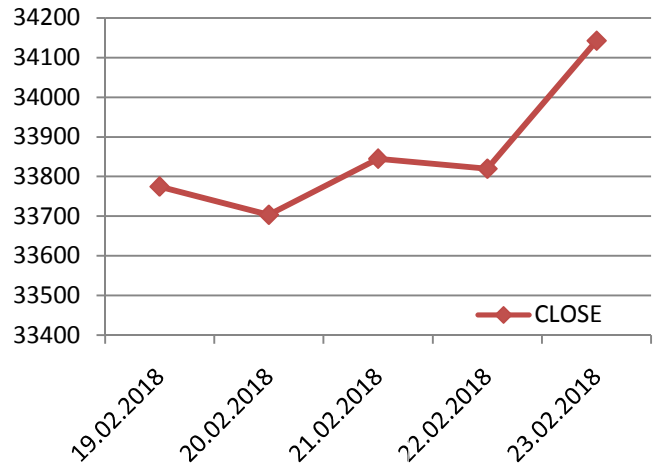
**Dollar Index Outlook (89.80)** : During the last week DX has given a bounce from 88.86 to 90.17 and closed above 20 DEMA of 89.65. Its support is likely to be seen around 89.50 and 89 for next week. Its resistance is likely to be seen around 90.30 and 90.70 for next week.

## CASH MARKET DATA

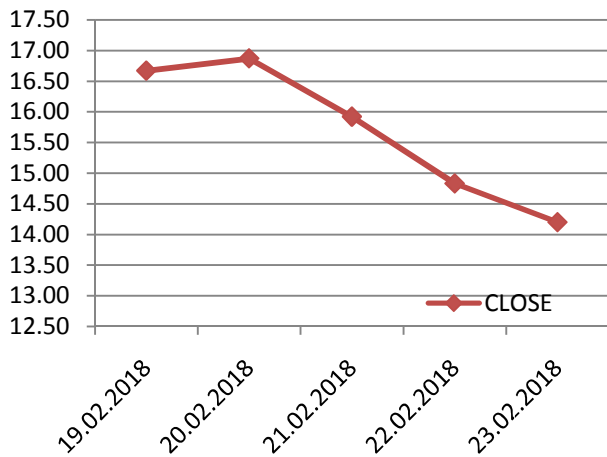
### Nifty



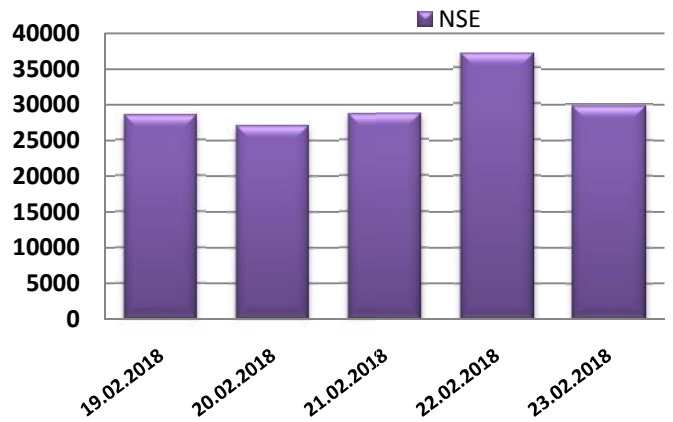
### Sensex



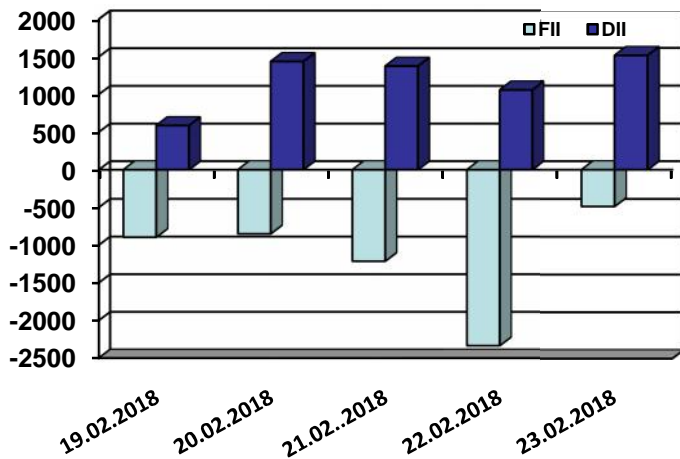
### VIX



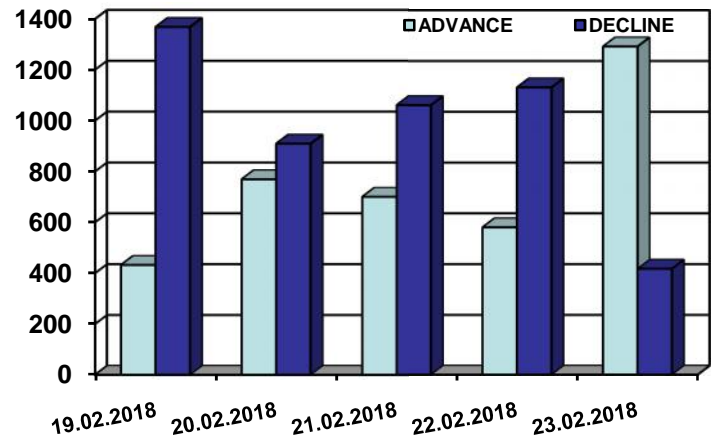
### Turnover (Rs. Cr.)



### FII/DII (Cr)



### Advance/Dcline



## WEEKLY CHANGE IN MARKET INDICATORS

Indices	23.02.2018	16.02.2018	Chg (Pts)	% Chg
NIFTY	10491.05	10452.30	38.75	0.37%
SENSEX	34142.15	34010.76	131.39	0.39%
BSEMIDCAP	16562.02	16602.34	-40.32	-0.24%
BSESMLCAP	17996.22	18035.75	-39.53	-0.22%
BSE-100	10856.54	10837.83	18.71	0.17%
BSE-200	4585.60	4574.33	11.27	0.25%
BSE-IPO	4980.25	4913.08	67.17	1.37%

## WEEKLY CHANGE IN SECTOR INDICES

Indices	23.02.2018	16.02.2018	Chg (Pts)	% Chg
* BSE AUTO INDEX	24327.52	24773.36	-445.84	-1.80%
* BSE BANKEX	28535.80	28396.48	139.32	0.49%
* BSE CAPITAL GOODS	18890.97	19200.53	-309.56	-1.61%
* BSE CONSUMER DUR	20968.96	20961.51	7.45	0.04%
* BSE FMCG INDEX	10562.66	10537.87	24.79	0.24%
* BSE HEALTHCARE	14225.36	14267.46	-42.10	-0.30%
* BSE IT SECTOR	12504.84	12099.00	405.84	3.35%
* BSE METAL INDEX	15327.90	15124.21	203.69	1.35%

## WEEKLY CHANGE IN WORLD INDICES

Indices	23.02.2018	16.02.2018	Chg (Pts)	% Chg
DOW JONES	25309.99	25219.38	90.61	0.36%
NASDAQ COMPOSITE	7337.39	7239.46	97.93	1.35%
FTSE	7244.41	7294.70	-50.29	-0.69%
NIKKEI	21892.77	21720.25	172.52	0.79%
BOVESPA	87293.24	84524.57	2768.67	3.28%
HANG SENG	31267.16	31115.42	151.74	0.49%

## PRIMARY MARKET UPDATES

Company	Issue Size (Cr)	Open	Close	Offer Price
H.G. Infra Engineering Ltd	360	26 Feb 2018	28 Feb 2018	263 – 270

## 52 WEEKS HIGH/LOW

Scrip	Rate	H/L	Prev H/L on
TECHM	624.95	H	5-Feb-18
MPHASIS	924.45	H	12-Feb-18
AARTIIND	1178.9	H	15-Feb-18
PFIZER	2325	H	15-Feb-18
KEC	406.55	H	16-Feb-18
INDIGO	1292	H	16-Aug-17
BAJAJHIND	12.9	L	6-Feb-18
SMLISUZU	784.75	L	6-Feb-18
TATAMOTORS	358.75	L	6-Feb-18
GDL	196.05	L	16-Feb-18

## ALL TIME HIGH/LOW

Scrip	Rate	H/L	Prev H/L on
AARTIIND	1178.9	H	15-Feb-18
HINDZINC	329	H	23-Oct-17
GSKCONS	6805.35	H	31-Jan-18
MPHASIS	924.45	H	12-Feb-18
KEC	406.55	H	16-Feb-18
ADVENZYMES	228	L	1-Aug-16
BSE	798.35	L	6-Feb-18
-	-	-	-
-	-	-	-
-	-	-	-

## INCREASE IN OPEN INTEREST

Symbol	Expiry Date	Last Price	Chg (Rs)	Chg (%)	Open Interest	MWPL Reached (%)	Change in OI (%)
JPASSOCIAT	28-Mar-18	19.3	2.75	16.62%	242726000	27982000	13.03%
GMRINFRA	28-Mar-18	18.95	1.20	6.76%	280440000	15930000	6.02%
FORTIS	28-Mar-18	161.1	13.40	9.07%	59472000	10136000	20.54%
IDBI	28-Mar-18	77.7	3.10	4.16%	53380000	5870000	12.36%
IDEA	28-Mar-18	82.5	0.90	1.10%	85323000	4606000	5.71%

## DECREASE IN OPEN INTEREST

Symbol	Expiry Date	Last Price	Chg (Rs)	Chg (%)	Open Interest	MWPL Reached (%)	Change in OI (%)
SUZLON	28-Mar-18	13.1	0.40	3.15%	354865000	-7840000	-2.16%
IDFC	28-Mar-18	53.45	1.40	2.69%	169593600	-2178000	-1.27%
TV18BRDCST	28-Mar-18	58.45	1.80	3.18%	66912000	-2142000	-3.10%
NATIONALUM	28-Mar-18	68.2	2.65	4.04%	51512000	-1312000	-2.48%
POWERGRID	28-Mar-18	194.05	2.55	1.33%	25852000	-740000	-2.78%

## INCREASE IN OI IN CALLS

Symbol	Expiry Date	Option Type	Strike Price	Last Price	Turnover Premium (Lacs)	Open Interest	Open Int Chg
JPASSOCIAT	28-Mar-18	CE	20	1.2	524.2	7038000	4284000
GMRINFRA	28-Mar-18	CE	20	0.75	172.88	8640000	6840000
SUZLON	28-Mar-18	CE	15	0.2	43.97	17850000	11725000
SAIL	28-Mar-18	CE	90	2.85	374.78	4332000	3204000
IDBI	28-Mar-18	CE	80	3.6	430.38	3120000	1480000

## INCREASE IN OI IN PUTS

Symbol	Expiry Date	Option Type	Strike Price	Last Price	Turnover Premium (Lacs)	Open Interest	Open Int Chg
SUZLON	28-Mar-18	PE	12.5	0.4	66.89	6405000	4865000
PNB	28-Mar-18	PE	110	6.35	615.98	2836000	1600000
JPASSOCIAT	28-Mar-18	PE	17.5	0.7	77.49	3570000	3536000
GMRINFRA	28-Mar-18	PE	17.5	0.55	39.3	3240000	2385000
FORTIS	28-Mar-18	PE	140	6.6	463.56	1592500	1487500

## LEVELS FOR NIFTY STOCKS

Security Name	HBP	2R	1R	CLOSE	ATP	1S	2S	LBP	Up/Down
ADANIPTS	417.08	413.17	409.83	406.50	405.92	402.58	398.67	395.33	UP
AMBUJACEM	269.33	265.67	262.93	260.20	259.27	256.53	252.87	250.13	UP
ASIANPAINT	1131.08	1124.07	1112.93	1101.80	1105.92	1094.78	1087.77	1076.63	DOWN
AUROPHARMA	637.20	624.60	613.25	601.90	600.65	589.30	576.70	565.35	UP
AXISBANK	555.20	547.05	541.85	536.65	533.70	528.50	520.35	515.15	UP
BAJAJ-AUTO	3057.38	3032.67	3009.53	2986.40	2984.82	2961.68	2936.97	2913.83	UP
BAJFINANCE	1682.47	1660.23	1646.82	1633.40	1624.58	1611.17	1588.93	1575.52	UP
BPCL	444.67	438.83	434.37	429.90	428.53	424.07	418.23	413.77	UP
BHARTIARTL	441.23	434.72	430.13	425.55	423.62	419.03	412.52	407.93	UP
INFRATEL	360.87	352.63	346.52	340.40	338.28	332.17	323.93	317.82	UP
BOSCHLTD	19236.08	19128.77	19024.68	18920.60	18917.37	18813.29	18705.97	18601.89	UP
CIPLA	618.77	611.88	603.77	595.65	596.88	588.77	581.88	573.77	DOWN
COALINDIA	319.25	316.55	313.75	310.95	311.05	308.25	305.55	302.75	DOWN
DRREDDY	2239.63	2212.32	2189.68	2167.05	2162.37	2139.73	2112.42	2089.78	UP
EICHERMOT	27727.02	27436.73	27080.57	26724.40	26790.28	26434.12	26143.83	25787.67	DOWN
GAIL	477.87	471.63	465.02	458.40	458.78	452.17	445.93	439.32	DOWN
HCLTECH	993.03	980.47	968.03	955.60	955.47	943.03	930.47	918.03	UP
HDFC	1841.13	1834.27	1829.23	1824.20	1822.37	1817.33	1810.47	1805.43	UP
HDFCBANK	1927.92	1906.38	1893.47	1880.55	1871.93	1859.02	1837.48	1824.57	UP
HEROMOTOCO	3569.80	3538.90	3516.80	3494.70	3485.90	3463.80	3432.90	3410.80	UP
HINDPETRO	395.23	391.07	388.58	386.10	384.42	381.93	377.77	375.28	UP
HINDALCO	256.72	252.08	249.32	246.55	244.68	241.92	237.28	234.52	UP
HINDUNILVR	1341.17	1336.38	1329.77	1323.15	1324.98	1318.37	1313.58	1306.97	DOWN
ICICIBANK	330.78	327.42	325.08	322.75	321.72	319.38	316.02	313.68	UP
IBULHSGFIN	1316.10	1304.55	1294.10	1283.65	1282.55	1272.10	1260.55	1250.10	UP
IOC	377.93	373.67	371.03	368.40	366.77	364.13	359.87	357.23	UP
INDUSINDBK	1683.42	1665.63	1654.57	1643.50	1636.78	1625.72	1607.93	1596.87	UP
INFY	1184.77	1175.38	1165.52	1155.65	1156.13	1146.27	1136.88	1127.02	DOWN
ITC	274.57	272.28	270.67	269.05	268.38	266.77	264.48	262.87	UP
KOTAKBANK	1096.13	1089.72	1085.28	1080.85	1078.87	1074.43	1068.02	1063.58	UP
LT	1335.60	1320.30	1311.00	1301.70	1295.70	1286.40	1271.10	1261.80	UP
LUPIN	825.53	820.17	813.83	807.50	808.47	802.13	796.77	790.43	DOWN
M&M	733.77	728.88	723.77	718.65	718.88	713.77	708.88	703.77	DOWN
MARUTI	8824.05	8781.50	8740.15	8698.80	8697.60	8656.25	8613.70	8572.35	UP
NTPC	167.90	165.95	164.75	163.55	162.80	161.60	159.65	158.45	UP
ONGC	195.95	193.40	191.60	189.80	189.05	187.25	184.70	182.90	UP
POWERGRID	198.12	195.98	194.62	193.25	192.48	191.12	188.98	187.62	UP
RELIANCE	955.83	946.92	940.58	934.25	931.67	925.33	916.42	910.08	UP
SBIN	282.70	279.95	278.00	276.05	275.25	273.30	270.55	268.60	UP
SUNPHARMA	610.52	592.88	581.27	569.65	563.63	552.02	534.38	522.77	UP
TATAMOTORS	369.47	367.03	363.62	360.20	361.18	357.77	355.33	351.92	DOWN
TATASTEEL	743.83	715.12	696.43	677.75	667.72	649.03	620.32	601.63	UP
TCS	3209.40	3149.20	3112.50	3075.80	3052.30	3015.60	2955.40	2918.70	UP
TECHM	649.22	637.08	629.27	621.45	617.13	609.32	597.18	589.37	UP
ULTRACEMCO	4216.62	4175.43	4145.92	4116.40	4104.73	4075.22	4034.03	4004.52	UP
UPL	733.37	718.18	709.37	700.55	694.18	685.37	670.18	661.37	UP
VEDL	356.98	348.87	343.38	337.90	335.27	329.78	321.67	316.18	UP
WIPRO	300.18	298.07	296.53	295.00	294.42	292.88	290.77	289.23	UP
YESBANK	337.03	331.52	327.48	323.45	321.97	317.93	312.42	308.38	UP
ZEEL	581.17	577.58	573.77	569.95	570.18	566.37	562.78	558.97	DOWN

## CORPORATE ACTION

Symbol	Series	Face Value(Rs.)	Purpose	Ex-Date	Record Date	BC Start Date	BC End Date
FDC	EQ	1	Buyback	26-Feb-18	27-Feb-18	-	-
INFIBEAM	EQ	1	Interim Dividend - Re 0.10 Per Share	26-Feb-18	27-Feb-18	-	-
VIDHIING	EQ	1	Interim Dividend - Re 0.20 Per Share	27-Feb-18	28-Feb-18	-	-
OMMETALS	EQ	1	Interim Dividend - Re 0.35 Per Share	27-Feb-18	28-Feb-18	-	-
MAYURUNIQ	EQ	5	Interim Dividend - Re 0.40 Per Share	28-Feb-18	3-Mar-18	-	-
IDFCBANK	HB	5000	Interest Payment	28-Feb-18	1-Mar-18	-	-
HINDPETRO	EQ	10	Interim Dividend - 14.50 Per Share	28-Feb-18	1-Mar-18	-	-
SHILPAMED	EQ	1	Interim Dividend	1-Mar-18	5-Mar-18	-	-

## RESULT CALENDAR

Symbol	Result Date	Symbol	Result Date
FORTIS	28-Feb-18	RAIN	28-Feb-18

## NEXT WEEK MAJOR ECONOMIC EVENTS

Time	Cur.	Imp.	Event	Forecast	Previous
<b>Monday, February 26, 2018</b>					
8:30:00 PM	USD		New Home Sales (Jan)	645K	625K
<b>Tuesday, February 27, 2018</b>					
7:00:00 PM	USD		Core Durable Goods Orders (MoM) (Jan)	0.40%	0.70%
8:30:00 PM	USD		CB Consumer Confidence (Feb)	126.3	125.4
<b>Wednesday, February 28, 2018</b>					
6:30:00 AM	CNY		Manufacturing PMI (Feb)	51.2	51.3
2:30:00 PM	EUR		German Unemployment Change (Feb)	-18K	-25K
3:30:00 PM	EUR		CPI (YoY) (Feb)	1.20%	1.30%
7:00:00 PM	USD		GDP (QoQ) (Q4)	2.50%	2.60%
8:30:00 PM	USD		Fed Chair Powell Testifies		
8:30:00 PM	USD		Pending Home Sales (MoM) (Jan)	0.40%	0.50%
9:00:00 PM	USD		Crude Oil Inventories		-1.616M
<b>Thursday, March 1, 2018</b>					
All Day		Holiday	South Korea - Independence Movement Day		
7:15:00 AM	CNY		Caixin Manufacturing PMI (Feb)	51.3	51.5
2:25:00 PM	EUR		German Manufacturing PMI (Feb)	60.3	60.3
3:00:00 PM	GBP		Manufacturing PMI (Feb)	55	55.3
8:30:00 PM	USD		ISM Manufacturing PMI (Feb)	58.7	59.1
<b>Friday, March 2, 2018</b>					
All Day		Holiday	India - Holi		
3:00:00 PM	GBP		Construction PMI (Feb)	50.7	50.2
7:00:00 PM	USD		Nonfarm Payrolls (Feb)	180K	200K
7:00:00 PM	USD		Unemployment Rate (Feb)		4.10%
7:00:00 PM	CAD		GDP (MoM) (Dec)	0.10%	0.40%

# **Tradeswift**

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