

19 January 2023



The Nifty ended 0.32% down at 18107.85. It opened on a flat note and remained range-bound throughout the session towards ending on a subdued note. Failing to close above 18150 suggesting it may continue range-bound oscillation. However, staying cautious on rise is advised. Chart pattern suggesting intraday range likely to be 18000-18250. Midway resistance is placed around 18150 levels.

On the Nifty hourly chart, the Benchmark Index is still seen hovering around the critical MA band. Hence, staying cautious on rise is advised.

Nifty patterns on multiple periods suggesting; the Benchmark Index may find sellers on rise in the resistance zone placed around 18200-18250. Index majors may find sellers on rise around critical resistances.

### Nifty Crucial Supports & Resistances-

**Supports- 18000, 17800 Resistances- 18200, 18250**

#### Open Positional Calls-

T+30 INST POSITIONAL SELL-

| Fut Segment | BANK OF BARODA @ 185-190, TGT- 150, Closing SL- above 210

T+30 INST POSITIONAL SELL-

| Fut Segment | SBIN @ 620-625, TGT- 575, Closing SL- above 650

T+30 INST POSITIONAL SELL-

| Fut Segment | ITC @ 335-340, TGT- 305, Closing SL- above 355

T+30 INST POSITIONAL SELL-

| Fut Segment | CAN BANK @ 330-335, TGT- 295, Closing SL - above 355

T+30 INST POSITIONAL SELL-

| Fut Segment | RBL BANK @ 182-184, TGT- 154, Closing SL- above 199

T+15 INST POSITIONAL SELL-

| Fut Segment | AMBUJA @ 535-540, TGT- 490, Closing SL- above 565

T+15 INST POSITIONAL SELL-

| Fut Segment | HIND PETRO @ 250-255, TGT- 235, Closing SL- above 265

T+5 BUY-

| Cash Segment | TECH MAHINDRA @ 1045-1040, TGT- 1080, Closing SL- below 1020

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## Nifty Intraday Chart



## Market in Retrospect

The Indian benchmark indices snapped their two-day rally to close lower in trade on Thursday.

Nifty index ended 0.32% lower, ended at 18,108. The broader markets represented by the Nifty 500 Index ended 0.30% lower, ending at 15,420. Among the sectorial indices, Nifty PSE was the top gainer gaining by 0.70%, followed by Nifty PSU Bank was gaining by 0.33%. Nifty Media was the top loser losing by 1%.

Coal India was the top gainer, gaining by 3.27%, followed by UPL and ONGC which gaining by 2.08% & 1.67%. Adani Enterprises was the top loser, losing by 3.70%, followed by Asian Paints and Tata Motors which losing by 2.69% & 1.87%.

## Market Turnover (In Crore) 19-01-2023

Name	Last	Previous
NSE Cash	41568.77	45891.73
NSE F&O	32444587.02	16907212.07
BSE Cash	2,992.50	2,720.07
BSE F&O	*NA	90.62

## FII Derivatives Flow (In Crore) 18-01-2023\*

Instrument	Purchase	Sale	Net
Index Future	3948.95	2022.12	1926.83
Index Option	911258.74	918350.99	7092.25
Stock Future	12671.47	11936.27	735.2
Stock Option	12597.69	12681.12	83.43

## Institutional Flow (In Crore) 19-01-2023

Institution	Purchase	Sale	Net
FII	7780.87	7380.89	399.98
DII	4321.53	4450.49	128.96

## NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Coal India	3.27	4.70	12938871	5426702
UPL	2.08	4.14	3553403	1288710
ONGC	1.67	3.83	18437610	12489090
BPCL	1.04	1.33	1639556	2457282
SBI Life Insurance	0.95	0.56	1189082	1033642

## NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Kotak Bank	1.77	0.69	4425644	2919718
Indusind Bank	1.84	0.71	9691261	2022913
Tata Motors	1.87	2.79	13126520	12007820
Asian Paints	2.69	1.71	2379947	1064171
Adani Enterprises	3.70	5.04	3696319	1949793

## Bulk and Block Deals

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

\*Data not updated till 9:25PM



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# Daily Dossier



## Sensex Intraday Chart



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

### Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	60858.43	187.31	0.31	1.50	1.53	2.96	1.26
Nifty	18107.85	57.50	0.32	1.40	1.70	3.40	0.94
BSE M Cap	25171.93	13.91	0.06	0.10	2.86	0.41	1.22
BSE S Cap	28773.27	68.36	0.24	0.08	2.80	0.11	5.82
Nifty MC 100	31344.60	34.70	0.11	0.05	2.62	1.16	0.06
BSE Auto	29260.00	142.95	0.49	0.10	1.71	0.33	10.97
BSE Capgoods	35138.99	77.53	0.22	2.87	0.98	8.90	14.99
BSE FMCG	16109.98	135.08	0.83	0.80	3.61	0.36	17.56
BSE Metal	21916.96	124.89	0.57	3.15	6.24	18.73	8.86
BSE Oil&Gas	20934.17	163.28	0.79	2.07	1.48	14.13	10.36
BSE Healthcare	23030.97	85.54	0.37	0.20	0.27	1.59	8.11
BSE Power	4498.65	46.43	1.02	2.63	0.92	4.11	14.40
BSE Realty	3434.96	4.03	0.12	1.20	2.66	0.99	13.70
BSE ConsDur	38330.11	308.06	0.80	1.61	4.29	8.86	15.92
BSE Bank	48044.65	168.85	0.35	0.31	2.68	4.05	10.53
BSE IT	29604.73	1.33	0.00	3.12	3.39	4.64	20.29

### Bond Markets

Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	3.36	0.01	0.17	2.20	6.15	18.61	80.42
UK	3.29	0.03	0.79	1.38	6.11	15.21	161.78
Brazil	6.16	0.39	6.72	5.48	3.10	8.49	23.71
Japan	0.44	0.02	3.92	13.53	72.94	71.60	206.25
Australia	3.32	0.22	6.32	7.62	5.97	15.79	66.35
India	7.31	0.01	0.15	0.18	0.22	1.83	10.80
Switzerland	1.08	0.03	2.56	6.89	17.91	17.47	1798.25
Germany	2.05	0.03	1.34	5.05	6.95	13.72	17183.3

### Currency

Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	81.36	0.12	0.14	0.24	1.65	2.00	8.52
USD Index	102.21	0.15	0.15	0.95	2.40	9.54	7.01
YUAN	6.79	0.03	0.43	0.85	2.84	6.50	6.51
GBP	1.23	0.00	0.17	0.96	1.47	9.88	9.44
EUR	1.08	0.00	0.27	0.28	2.04	10.74	4.58
YEN	128.54	0.36	0.28	0.55	6.51	16.62	11.05

### Freight

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	874.00	47.00	5.10	16.20	43.54	53.29	44.33
Baltic Dirty	1421.00	6.00	0.42	1.39	30.45	16.90	105.35
SG Dubai HY	25.48	2.40	10.40	18.79	23.39	24.23	638.55

### Global Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	33296.96	613.89	1.81	1.21	1.65	9.44	4.94
Nasdaq	10957.01	138.10	1.24	2.00	3.90	2.59	23.59
S&P 500	3928.86	62.11	1.56	0.25	2.91	6.32	13.32
FTSE100	7767.13	60.65	0.77	0.31	5.55	12.20	2.38
CAC40	6995.76	83.54	1.18	0.35	8.13	15.88	2.41
DAX	14999.16	176.37	1.16	0.35	7.62	17.77	5.09
Mexico IPC	53218.83	89.87	0.17	0.02	6.55	15.15	0.75
Brazil Bovespa	112228.4	789.27	0.71	0.26	7.15	3.48	3.90
Russian RTS	994.28	11.84	1.18	2.11	0.32	1.56	29.70
Japan Nikkei	26405.23	385.89	1.44	0.17	3.06	3.13	3.87
Hang Seng	21650.98	27.02	0.12	0.64	11.88	31.13	10.27
Taiwan Index	14932.93	5.92	0.04	0.88	2.78	13.78	18.75
Shanghai Comp	3240.28	15.87	0.49	2.43	4.29	6.43	8.93
KOSPI	2380.34	12.02	0.51	0.64	1.20	6.39	16.25
Malaysia KLCI	1496.22	0.72	0.05	0.51	1.30	5.73	2.23
Jakarta Comp	6819.91	54.12	0.80	2.87	0.59	0.59	3.46
Philippine SE	7062.01	32.85	0.46	3.34	10.10	14.86	2.75
Thai Exch	1688.48	3.04	0.18	0.06	4.34	6.28	1.82

### Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	78.56	0.89	1.12	1.52	4.52	8.14	9.63
BRENT Crude	84.20	0.77	0.91	0.21	5.08	3.67	6.16
Natural Gas	3.32	0.02	0.45	9.40	41.75	44.71	21.46

### LME

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1908.61	3.63	0.19	0.56	6.72	17.08	3.65
Silver(\$/Ounce)	23.40	0.08	0.33	1.64	1.74	26.67	3.11
Aluminium	2611.70	17.95	0.69	5.41	11.75	19.72	13.76
Copper	9326.00	43.01	0.46	2.40	13.26	24.63	3.71
Zinc	3422.96	110.21	3.33	6.10	12.28	18.88	4.37
Lead	2188.26	50.74	2.27	0.71	1.53	6.77	5.85

### Agro Commodities

Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	155.75	0.75	0.48	8.23	5.20	16.82	34.97
Cotton	84.71	0.10	0.12	0.53	0.75	8.64	11.65
Sugar	19.84	0.02	0.10	0.97	1.49	6.38	7.53
Wheat	740.75	1.75	0.24	0.10	1.04	13.82	6.65
Soybean	1522.25	2.25	0.15	1.96	4.01	9.38	17.68

**HUL**

India's largest fast-moving consumer goods company Hindustan Unilever Ltd reported standalone net profit for the third quarter ended December 2022 rose 11.6% year-on-year (YoY) to INR2,505 crore, helped by an increasing demand for its beauty and personal care products, which offset a rise in raw-material costs. The firm had reported a profit of INR2,243 crore in the corresponding quarter of last year. The profit was higher than the average profit forecast of INR2,497.90 crore. The Indian arm of global consumer goods giant Unilever Plc recorded double-digit revenue growth of 16% at INR14,986 crore for the third quarter of the financial year 2022-23 as against INR12,900 crore in the year-ago period. This revenue growth was largely driven by Beauty and Personal Care Segment, Home Care, and price hikes in laundry. Growth was ahead of the market with more than 75% of the business winning market shares. The firm has reported an EBITDA or earnings before interest, tax, depreciation, and amortization of INR3,537 crore in the December quarter. Meanwhile, the company's EBITDA margins dipped 180 bps YoY to 23.6%.

**Asian Paints**

Asian Paints consolidated net profit for the December quarter rose 5.6% on year to Rs 1,073 crore, while revenue increased by a moderate 1.3% to Rs 8,636.74 crore. Consolidated operating profit increased by 4.5% on year to Rs 1,611.43 crore, while margin expanded 57 basis points to 18.66%. The domestic decorative business saw flat growth both in volume and value terms in the quarter, as the base quarter of last year saw a high increase in prices. International sales increased 2.1% in the quarter to Rs 778.82 crore. In constant currency terms, sales increased by 13.4%.

**AU Small Finance Bank**

Net profit of AU Small Finance Bank rose 30.05% to Rs 392.83 crore in the quarter ended December 2022 as against Rs 302.05 crore during the previous quarter ended December 2021. Total Operating Income rose 41.54% to Rs 2118.07 crore in the quarter ended December 2022 as against Rs 1496.45 crore during the previous quarter ended December 2021.

**Havells India**

Net profit of Havells India declined 7.29% to Rs 283.52 crore in the quarter ended December 2022 as against Rs 305.82 crore during the previous quarter ended December 2021. Sales rose 12.65% to Rs 4127.67 crore in the quarter ended December 2022 as against Rs 3664.21 crore during the previous quarter ended December 2021.

**L&T Tech Services**

L&T Technology Services reported a 22 per cent rise in net profit to INR303.6 crore for the December 2022 quarter. This is against a net profit of INR248.8 crore in the year-ago period. The revenue of the company grew by 21.4 per cent to INR2,048.6 crore in the quarter under review from INR1,687.5 crore a year ago. EBIT for the quarter stood INR382.9 crore while the EBIT margin at 18.7 per cent.



## **Hindustan Zinc**

Hindustan Zinc, a subsidiary of Vedanta, reported a consolidated net profit of INR2,156 crore for the December quarter, which is 20% lower than INR2,701 crore reported in the year-ago period. On a sequential basis, the profit after tax (PAT) declined 19%. It was INR2,680 crore in the September quarter (Q2FY23). Revenue from operations, meanwhile, declined 2% to INR7,628 crore as against INR7,841 crore in the same quarter last year. The company's EBITDA came in at INR3,717 crore in the three months period, down 15% year-on-year from INR4,392 crore. The mining company has declared a third interim dividend of INR13 per share, amounting to INR5,493 crore.

## **ICICI Securities**

Net profit of ICICI Securities declined 26.13% to Rs 280.95 crore in the quarter ended December 2022 as against Rs 380.35 crore during the previous quarter ended December 2021. Sales declined 6.66% to Rs 878.96 crore in the quarter ended December 2022 as against Rs 941.64 crore during the previous quarter ended December 2021.

## **Happiest Minds**

Happiest Minds Technologies garnered a consolidated net profit of INR57.58 crore in the December 2022 quarter (Q3FY23) period. The latest PAT climbed by 17.70% from a profit of INR48.92 crore recorded in Q3FY22, while it was up by 3.1% from the INR59.41 crore profit witnessed in Q2 of FY23. Consolidated revenue from contracts with customers stood at INR366.88 crore increasing by 29.21% from INR283.94 crore in the third quarter of last year. However, revenue surged by 3.2% from INR355.51 crore in September 2022 quarter. During the quarter under review, EBIT came at INR79.5 crore, while margins were at 21.7%. Overall, total income on a consolidated basis stood at INR374.68 crore in Q3FY23 versus INR292.28 crore in Q3FY22 and INR359.33 crore in Q2FY23. On a standalone basis, Q3FY23 PAT came in at INR57.27 crore versus INR44.78 crore in Q3FY22 and INR55.31 crore in Q2FY23. Revenue stood at INR344.76 crore in Q3FY23 versus INR265.88 crore in Q3FY22 and INR337.65 crore in Q2 of FY23.

## **Datamatics Global Services**

Net profit of Datamatics Global Services rose 24.07% to Rs 45.87 crore in the quarter ended December 2022 as against Rs 36.97 crore during the previous quarter ended December 2021. Sales rose 23.90% to Rs 372.64 crore in the quarter ended December 2022 as against Rs 300.77 crore during the previous quarter ended December 2021.

## **Kuantum Papers**

Net profit of Kuantum Papers rose 1317.82% to Rs 57.28 crore in the quarter ended December 2022 as against Rs 4.04 crore during the previous quarter ended December 2021. Sales rose 52.18% to Rs 348.51 crore in the quarter ended December 2022 as against Rs 229.01 crore during the previous quarter ended December 2021.

### PVR

PVR, the largest multiplex chain in the country, posted a consolidated net profit of Rs 16.1 crore during October-December 2022 quarter, against a loss of Rs 10 crore in the year-ago period. Revenue from operations rose 53 percent year-on-year (YoY) to Rs 941 crore from Rs 614 crore registered in the corresponding quarter of the previous fiscal. EBITDA (earnings before interest, taxes, depreciation and amortisation) grew 75.1 percent YoY to Rs 288.8 crore. Margins also improved YoY from 26.9 percent to 30.7 percent. During the last year, PVR has opened 63 screens across 11 cinemas till date and is on track to open a total of 100-110 new screens by the end of the current fiscal year.

### Sterling & Wilson Renewable Energy

Net Loss of Sterling & Wilson Renewable Energy reported to Rs 101.24 crore in the quarter ended December 2022 as against net loss of Rs 422.41 crore during the previous quarter ended December 2021. Sales declined 72.78% to Rs 406.96 crore in the quarter ended December 2022 as against Rs 1494.86 crore during the previous quarter ended December 2021.

### Alembic Pharmaceuticals gets USFDA nod to market generic cancer drug

Alembic Pharmaceuticals has received approval from the US health regulator to market Acalabrutinib Capsules, used in the treatment of mantle cell lymphoma, in the American market. The company has received tentative approval from the US Food & Drug Administration (USFDA) for Acalabrutinib Capsules (100 mg). The company's product is therapeutically equivalent to AstraZeneca UK's Calquence Capsules (100 mg). Acalabrutinib Capsules are indicated for the treatment of adult patients with mantle cell lymphoma (MCL) who have received at least one prior therapy and treatment of adult patients with chronic lymphocytic leukaemia (CLL) or small lymphocytic lymphoma (SLL).

### Maharashtra govt approves M&M proposal to set up Rs 10k-cr EV plant in Pune

Mahindra & Mahindra (M&M) said the Maharashtra government has approved its proposal to set up a Rs 10,000-crore electric vehicle plant in Pune under the state's industrial promotion scheme for EVs. The two sides signed an agreement to this effect at the World Economic Forum in Davos on Wednesday. The company, through its subsidiary, will make this investment over a period of 7-8 years for setting up the manufacturing facility, development and production of its upcoming Born Electric Vehicles (BEVs). The company has received this approval from the Maharashtra government for setting up its EV manufacturing plant in Pune, and investing in what has been its 'home' state for over 70 years, said Rajesh Jejurikar, Executive Director for auto and farm sector at Mahindra & Mahindra Ltd.

### December retail sales jump 16% from pre-Covid levels

The Retailers Association of India (RAI) conducted the 35th edition of the Retail Business Survey, according to which the retail sales in December 2022 grew 16 per cent as against the sales recorded during December 2019 or the pre-pandemic period. December, retail businesses across regions indicated a jump in sales as compared to pre-pandemic levels with east India signaling a growth of 20 per cent, while retailers in south India and west India reporting a growth of 18 per cent and 16 per cent, respectively, followed by 10 per cent growth in North India.

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

Company	Details
Shradha Infraprojects Ltd	Cash dividend of INR2 effective 20-01-2023
DCM Financial Services Ltd	Corporate meeting effective 20-01-2023
Filtron Engineers Ltd	Corporate meeting effective 20-01-2023
Goldstar Power Ltd/India	Stock dividend of INR1.8 effective 20-01-2023
Deep Diamond India Ltd	10 for 1 stock split effective 20-01-2023
Goldstar Power Ltd/India	10 for 1 stock split effective 20-01-2023
Shradha Infraprojects Ltd	2 for 1 stock split effective 20-01-2023

### Domestic Events

- India Foreign Exchange Reserve for January 13, 2023.

### Global Events

- The U.S. Existing Home Sales for December 2022.
- Japan Inflation for December 2022.



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