

**MARKET OVERVIEW****Pre Open Thoughts: Global comeback**

Asian shares look set to post a third straight weeks of gains on Friday as investors scaled back cautious bets on the global economy after a string of positive US economic data and a recovery in oil and commodity prices. The rebound in risk asset prices could continue if the upcoming US employment report points to solid job gains, but not strong enough to encourage rate rises in the near term. MSCI's broadest index of Asia-Pacific shares outside Japan was up 0.1 percent, hovering just below its two-month high hit the previous day. Japan's Nikkei slipped 0.3 percent. "Globally markets are rolling back the extreme risk-off trading they did in January and February. Part of the reason is that the Fed seems to be easing its insistence on raising rates," said Norihiro Fujito, senior investment strategist at Mitsubishi UFJ Morgan Stanley Securities.

On Thursday MSCI's world equity index covering 46 markets touched a two-month high. The rally was led by emerging markets, with a measure of emerging-markets shares rising 1.4 percent on Thursday for a fifth day of gains, its longest winning streak this year. The biggest move came from Brazil's Bovespa index, which rose more than 5 percent, its biggest gain in six years, on news that President Dilma Rousseff could be implicated in a sweeping corruption scandal.

INDIAN INDICES	CLOSE	PTS	% CHG
SENSEX	24606.99	364.01	1.50
NIFTY 50	7475.60	106.75	1.45
BANKNIFTY	15177.75	85.3	0.57
SMALL CAP	10209.66	135.69	1.35
MIDCAP	10110.46	58.6	0.58
BANDEX	17264.93	85.5	0.50
IT	11030.47	156.1	1.44
AUTO	16942.33	345.92	2.08
FMCG	7439.61	-14.96	-0.20
POWER	1676.42	22	1.33
REALTY	1155.53	4.82	0.42
OIL & GAS	8630.94	131.19	1.54
METAL	7281.65	283.32	4.05
CAPITAL GOODS	12290.43	486.43	4.12
INDVIX	18.04	-0.95	-5.00
COMMODITY PRICE	CLOSE	PTS	% CHG
GOLD	29616.00	0	0.00
SILVER	36304.00	0	0.00
CRUDEOIL	2337.00	0	0.00
COPPER	331.15	0	0.00
ZINC	123.85	0	0.00
LEAD	124.00	0	0.00
GLOBAL INDICES*	CLOSE	PTS	% CHG
DOW JONES	16944.00	45.00	0.26
NASDAQ	4707.00	4.00	0.08
FTSE 100	6130.00	-17.00	-0.28
ASIAN INDICES*	CLOSE	PTS	% CHG
HANG SANG	20061.00	118.00	0.56
NIKKEI	17006.00	46.00	0.27
SHANGHAI	2846.00	-14.00	-0.48
CURRENCY FUTURE	2-Mar	3-Mar	NET%
USDINR	67.8675	67.5875	-0.41
EURINT	73.7475	73.5425	-0.27
GBPINR	94.9150	95.0975	0.19
JPYINR	59.3825	59.3225	-0.10
FII/DII CAPITAL MKT*	BUY	SELL	NET
FII	4363.82	3451.84	911.98
DII	1900.64	1940.09	-464.75
FII/DII DERIVATIVES	BUY	SELL	NET
INDEX FUTURES	2269.63	2009.95	259.69
INDEX OPTIONS	26299.88	25844.89	455.00
STOCK FUTURES	3957.42	3701.35	256.07
STOCK OPTIONS	2137.47	2169.90	-32.43

## IMPORTANT MARKET HIGHLIGHTS

Gains in metal and capital goods stocks along with index heavyweights Infosys and HDFC led the latest rally for the two key benchmark indices. The barometer index, the S&P BSE Sensex, rose 340.01 points or 1.4% at 24,582.99, as per the provisional closing data. The 50-unit Nifty 50 index rose 106.75 points or 1.45% at 7,475.60, as per the provisional closing data. The Sensex and the Nifty, both, hit their highest level in more than three weeks as the two key benchmark indices extended gains in late trade. The Sensex and the Nifty remained in positive zone throughout the trading session after opening with an upward gap. The two key benchmark indices edged higher for the third day in a row.

Gains in Asian stocks once again aided the upmove on the domestic bourses. Asian stocks edged higher on favourable US economic data overnight. A monthly employment report showed acceleration in US private sector job addition last month.

Metal and mining stocks were in demand after favourable announcements in the Union Budget 2016-17 announced early this week. Hindustan Copper rose 4.65%.

Capital goods stocks extended recent gains. L&T (up 6.35%), Bharat Heavy Electricals (Bhel) (up 5.91%), BEML (up 0.83%), Bharat Electronics (up 2.38%), Crompton Greaves (up 0.11%), ABB India (up 5.29%) and Thermax (up 0.91%) gained. Siemens fell 0.44%.

In October 2015, Dr Reddy's Laboratories had entered into a settlement agreement with Helsinn Healthcare SA, a Switzerland-based pharma company for patent litigations related to Aloxi generic in the US. With this settlement, the company is permitted to market Aloxi generic on 30 September 2018 or earlier.

MARKET TURNOVER	2-Mar	3-Mar	NET%
NSE CASH	20722.76	18725.94	-10.66
BSE CASH	3356.08	2869.89	-16.94
NSE FUTURES	52025.13	41744.56	-24.63
NSE OPTIONS	200094.71	164828.96	-21.40
ADVANCE / DECLINE	ADV	DEC	UNCH
NSE	1089	453	67
BSE	1717	922	141
NIFTY GAINER	2-Mar	3-Mar	% CHG
VEDL	78.15	83.95	7.42
TATASTEEL	267.55	287.05	7.29
BHEL	97.10	103.30	6.39
TATAMOTORS	317.10	336.70	6.18
LT	1137.90	1207.10	6.08
NIFTY LOSER	2-Mar	3-Mar	% CHG
ZEEL	394.45	399.25	-1.20
ULTRACEMCO	2944.25	2973.00	-0.97
ICICIBANK	218.00	220.00	-0.91
ITC	318.15	319.55	-0.44
NTPC	126.40	126.80	-0.32
CASH SEGMENT VOLUME TOPPERS	2-Mar	3-Mar	VALUE (In crore)
JUSTDIAL	560.15	662.85	619.73
SBIN	181.15	182.75	607.42
AXISBANK	407.25	417.15	604.81
TATASTEEL	267.55	287.05	492.47
ICICIBANK	220.00	218.00	452.95
TOP TRADED STOCK FUTURE	EXP. DATE	TRADE VALUE (Rs.)	NO. OF CONTRACTS
SBIN	31/03/2016	11323517100	31392
LT	31/03/2016	9998178195	28155
ICICIBANK	31/03/2016	7236323785	19713
TATASTEEL	31/03/2016	10874161600	19406
RELIANCE	31/03/2016	8887703975	17646
TOP TRADED STOCK OPTION	STRIKE PRICE	OPTION TYPE	NO. OF CONTRACTS
LT	1200	CE	5722
SBIN	180	CE	3616
SBIN	200	CE	3338
TATAMOTORS	340	CE	3201
SBIN	190	CE	3174

## CORPORATE NEWS

- MEP Infra gains on winning toll collection rights in Tamil Nadu
- Hindalco jumps 15.44% in three sessions
- Dr Reddy's Lab jumps after USFDA approval for anti-nausea drug
- HCL Tech extends gains after winning outsourcing contract
- Trent gains on likely alliance with Future Group
- Tata Steel surges after reports of receiving green nod for expansion project
- Volumes jump at Oracle Financial Services Software counter
- Eveready Industries gains after reports of plans to hive off packet tea business
- Vijaya Bank gains on fund raising plan
- Infosys gains after Al Ahli Bank selects Finacle solutions
- SPARC gains ahead of board meet for proposed rights issue
- Central Bank of India gains on fund raising plan
- NHPC gains after declaring commercial operation of unit 1 of Teesta power project
- BPCL drops ex-dividend
- Maruti Suzuki India slips after price hike
- HDFC gains after announcing fund raising plans
- NBCC gains on stock split plan

MOST ACTIVE CALLS	EXP. DATE	STRIKE PRICE	LTP
NIFTY	31-Mar-16	7500	104.00
NIFTY	31-Mar-16	7600	63.90
NIFTY	31-Mar-16	7700	35.85
NIFTY	31-Mar-16	7400	157.20
NIFTY	31-Mar-16	7800	19.00
MOST ACTIVE PUTS	EXP. DATE	STRIKE PRICE	LTP
NIFTY	31-Mar-16	7200	56.50
NIFTY	31-Mar-16	7300	80.00
NIFTY	31-Mar-16	7000	29.50
NIFTY	31-Mar-16	7100	40.00
NIFTY	31-Mar-16	7400	113.00
INDICES LEVEL	NIFTY 50	SENSEX	NIFTY IT
CLOSE	7475.60	24606.99	11054.95
R3	7611.00	25058.05	11308.95
R2	7533.10	24800.82	11170.35
R1	7504.35	24703.91	11112.65
PIVOT	7455.20	24543.59	11031.75
S1	7426.45	24446.68	10974.05
S2	7377.30	24286.36	10893.15
S3	7299.40	24029.13	10754.55
ADR PRICE	LTP	VOLUME	%CHG
Dr. Reddy's Lab	47.59	787362	5.57
H D F C Bank	56.61	1132993	-0.33
I C I C I Bank	6.62	22105164	4.75
Infosys Technologies	18.18	5440565	2.83
MakeMy Trip Ltd.	17.77	426474	0.62
REDIFF.COM	0.53	5880	-9.14
SATYAM INFOWAY	1.04	34491	0.97
Tata Motors	25.71	2457766	7.89
Wipro	11.92	357627	-0.08
BULK DEALS	BUY/SELL	QUANTITY	TRADE PRICE
BALPHARMA	BUY	77897	93.54
JUSTDIAL	BUY	452459	631.94
PONNIERODE	BUY	75000	199.87
SHYAMCENT	BUY	1500000	4.70

## MARKET OUTLOOK

<b>NIFTY 50</b>	<b>1.45%</b> ▲
NET CHG	106.75
OPEN	7329.55
HIGH	7483.95
LOW	7406.05
CLOSE	7475.60

<b>SENSEX</b>	<b>1.50%</b> ▲
NET CHG	364.01
OPEN	24386.67
HIGH	24640.51
LOW	24383.28
CLOSE	24606.99

<b>NIFTY IT</b>	<b>1.45%</b> ▲
NET CHG	157.85
OPEN	10982.00
HIGH	11089.45
LOW	10950.85
CLOSE	11054.95



Nifty View 4th March 2016 (Previous Close 7475):

Yesterday, Index opened on a positive note, carried forward its bullish momentum of the past 3 days & witnessed a massive rally up to 7480, closing 1.3% up for the day.

Going Forward,

Post a rally of 650 points in 4 sessions, Going Forward Index will get support around 7430 & till 7430 holds, the up move shall continue up to 7530-7560. Break of 7430, will lead to retest of support zone of 7370-7340.

7550-7560 will act as a stiff resistance & Index could witness a mild correction from that zone with RSI being in Overbought Zone of Hourly Charts. On the Derivatives Front, Yesterday, Highest OI is witnessed in 7500 calls (Both 52 Lakhs) with significant additions to the tune of 1.4 Lakhs in 7500 Calls. On the Put side, Highest OI is witnessed in 7200 Strike with additions of 10, 7 & 15 Lakhs in 7200, 7300 & 7400 Puts implies that on a broader time-frame, 7415-7425 would be a stronger support for the series & 7560-7580 is a strong resistance and this will act as a supply zone.

Trading Range: 7390 – 7580.

## PIVOT TABLE

SCRIP	HIGH	LOW	CLOSE	S3	S2	S1	PIVOT	R1	R2	R3
ACC	1259.80	1233.00	1254.15	1195.38	1222.18	1238.17	1248.98	1264.97	1275.78	1302.58
ADANI PORTS	229.45	217.65	227.50	201.27	213.07	220.28	224.87	232.08	236.67	248.47
AMBUJACEM	200.70	195.80	199.65	188.92	193.82	196.73	198.72	201.63	203.62	208.52
ASIANPAINT	896.50	871.75	880.25	833.33	858.08	869.17	882.83	893.92	907.58	932.33
AXISBANK	419.00	407.10	417.15	390.62	402.52	409.83	414.42	421.73	426.32	438.22
BAJAJ-AUTO	2286.20	2241.00	2280.10	2178.70	2223.90	2252.00	2269.10	2297.20	2314.30	2359.50
BANKBARODA	147.40	141.20	145.40	132.27	138.47	141.93	144.67	148.13	150.87	157.07
BHARTIARTL	334.95	324.00	333.40	308.88	319.83	326.62	330.78	337.57	341.73	352.68
BHEL	103.85	97.15	103.30	88.03	94.73	99.02	101.43	105.72	108.13	114.83
BOSCHLTD	17375.00	16861.00	17287.85	16146.62	16660.62	16974.23	17174.62	17488.23	17688.62	18202.62
BPCL	792.85	771.30	789.95	741.60	763.15	776.55	784.70	798.10	806.25	827.80
CAIRN	131.80	126.35	129.90	118.45	123.90	126.90	129.35	132.35	134.80	140.25
CIPLA	531.00	523.40	527.10	511.97	519.57	523.33	527.17	530.93	534.77	542.37
COALINDIA	317.05	310.00	314.10	299.62	306.67	310.38	313.72	317.43	320.77	327.82
DRREDDY	3201.00	3062.00	3188.15	2872.38	3011.38	3099.77	3150.38	3238.77	3289.38	3428.38
GAIL	348.85	316.00	339.75	269.17	302.02	320.88	334.87	353.73	367.72	400.57
GRASIM	3529.00	3440.00	3496.95	3310.65	3399.65	3448.30	3488.65	3537.30	3577.65	3666.65
HCLTECH	866.35	851.60	859.30	829.58	844.33	851.82	859.08	866.57	873.83	888.58
HDFC	1135.80	1107.05	1124.15	1064.83	1093.58	1108.87	1122.33	1137.62	1151.08	1179.83
HDFCBANK	1020.00	1010.00	1015.85	995.28	1005.28	1010.57	1015.28	1020.57	1025.28	1035.28
HEROMOTOCO	2849.00	2800.00	2826.00	2727.00	2776.00	2801.00	2825.00	2850.00	2874.00	2923.00
HINDALCO	79.80	75.50	79.25	69.58	73.88	76.57	78.18	80.87	82.48	86.78
HINDUNILVR	856.10	845.75	848.90	829.55	839.90	844.40	850.25	854.75	860.60	870.95
ICICIBANK	220.30	214.20	218.00	205.30	211.40	214.70	217.50	220.80	223.60	229.70
IDEA	109.70	106.25	108.35	101.20	104.65	106.50	108.10	109.95	111.55	115.00
INDUSINDBK	898.10	884.25	895.75	865.00	878.85	887.30	892.70	901.15	906.55	920.40
INFY	1192.85	1154.00	1169.30	1094.35	1133.20	1151.25	1172.05	1190.10	1210.90	1249.75
ITC	325.00	316.75	318.15	303.47	311.72	314.93	319.97	323.18	328.22	336.47
KOTAKBANK	661.50	649.95	657.65	633.27	644.82	651.23	656.37	662.78	667.92	679.47
LT	1211.20	1134.45	1207.10	1030.75	1107.50	1157.30	1184.25	1234.05	1261.00	1337.75
LUPIN	1812.00	1765.55	1784.00	1694.28	1740.73	1762.37	1787.18	1808.82	1833.63	1880.08
M&M	1228.30	1200.35	1215.35	1158.77	1186.72	1201.03	1214.67	1228.98	1242.62	1270.57
MARUTI	3647.00	3578.00	3608.65	3473.22	3542.22	3575.43	3611.22	3644.43	3680.22	3749.22
NTPC	128.85	125.95	126.40	121.27	124.17	125.28	127.07	128.18	129.97	132.87
ONGC	200.85	193.75	197.20	183.07	190.17	193.68	197.27	200.78	204.37	211.47
PNB	80.40	76.50	79.00	70.83	74.73	76.87	78.63	80.77	82.53	86.43
POWERGRID	136.90	134.05	135.65	129.83	132.68	134.17	135.53	137.02	138.38	141.23
RELIANCE	1018.00	997.50	1012.85	968.45	988.95	1000.90	1009.45	1021.40	1029.95	1050.45
SBIN	184.60	178.50	182.75	169.75	175.85	179.30	181.95	185.40	188.05	194.15
SUNPHARMA	873.85	852.60	870.90	823.28	844.53	857.72	865.78	878.97	887.03	908.28
TATAMOTORS	339.80	321.50	336.70	296.07	314.37	325.53	332.67	343.83	350.97	369.27
TATAPOWER	59.90	58.50	59.50	56.50	57.90	58.70	59.30	60.10	60.70	62.10
TATASTEEL	289.00	272.10	287.05	248.92	265.82	276.43	282.72	293.33	299.62	316.52
TCS	2391.00	2301.00	2373.15	2175.05	2265.05	2319.10	2355.05	2409.10	2445.05	2535.05
TECHM	464.00	452.20	461.75	435.72	447.52	454.63	459.32	466.43	471.12	482.92
ULTRACEMCO	3010.00	2936.10	2944.25	2815.65	2889.55	2916.90	2963.45	2990.80	3037.35	3111.25
VEDL	85.60	78.30	83.95	68.02	75.32	79.63	82.62	86.93	89.92	97.22
WIPRO	548.45	535.25	542.70	515.73	528.93	535.82	542.13	549.02	555.33	568.53
YESBANK	760.00	741.10	757.65	715.12	734.02	745.83	752.92	764.73	771.82	790.72
ZEEL	404.45	387.45	394.45	361.45	378.45	386.45	395.45	403.45	412.45	429.45
ZEEL	404.45	387.45	394.45	361.45	378.45	386.45	395.45	403.45	412.45	429.45

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