

## MARKET OVERVIEW

### Pre Open Thoughts: Keep Playing!!!

Welcome back after a festive break. The difference between CAN and CANNOT are only three letters. And These three letter can determine your life direction... It is always said Champions keep playing until they get it right. Exactly that's what is proved as after suffering early setbacks in the tournaments India has managed to qualify for the World Twenty20 semi-finals last night knocking out Australia.

Coming to Stock markets it a tough test between bulls and the bears for now as its seems difficult at current juncture as Fund Flows have been Important factor for India where-in, FIIs continue to be net buyer of Indian equities while their local counterparts have been doing exactly the opposite. Slowly and steadily they have been picking up stocks during the course of the recent correction.

Domestically Investors need to play like Indian Captain Cool rather than look at high risk strokes. The outlook is a flat start. Japanese stocks rose, with the Topix index headed for its first monthly gain in four months, as the yen fell for a seventh day after data showed the U.S. economy grew at a faster pace than previously estimated.

The rupee would be in focus too. On the whole, things should be okay today but outlook may turn choppy as this week's F&O expiry could add to the volatility. Till then our markets will have to deal with it. With the key indices hovering near the levels of 7700-7650. For Nifty going forward in the short term it will be a lot of stock-centric action based on news reports.

INDIAN INDICES	CLOSE	PTS	% CHG
SENSEX	25337.56	7.07	0.03
NIFTY 50	7716.50	1.6	0.02
BANKNIFTY	15887.75	-48.25	-0.30
SMALL CAP	10501.80	24.76	0.24
MIDCAP	10524.47	25.64	0.24
BANKEX	18110.19	-43.24	-0.24
IT	11297.67	68.02	0.61
AUTO	17830.08	98.66	0.56
FMCG	7614.27	-2.47	-0.03
POWER	1743.18	-4.97	-0.28
REALTY	1231.12	-2.6	-0.21
OIL & GAS	9060.42	-100.98	-1.10
METAL	7643.19	128.51	1.71
CAPITAL GOODS	12936.70	60.11	0.47
INDVIX	16.35	-0.09	-0.52
COMMODITY PRICE	CLOSE	PTS	% CHG
GOLD	28599.00	0	0.00
SILVER	36669.00	0	0.00
CRUDEOIL	2658.00	0	0.00
COPPER	332.05	0	0.00
ZINC	119.65	0	0.00
LEAD	117.95	0	0.00
GLOBAL INDICES*	CLOSE	PTS	% CHG
DOW JONES	17515.00	13.14	0.08
NASDAQ	4773.00	4.64	0.1
FTSE 100	6106.00	-92.63	-1.49
ASIAN INDICES*	CLOSE	PTS	% CHG
HANG SANG	20345.00	-269.62	-1.31
NIKKEI	17002.00	110.42	0.65
SHANGHAI	2979.00	18.46	0.62
CURRENCY FUTURE	22-Mar	23-Mar	NET%
USDINR	66.7325	66.6675	-0.09
EURINT	74.8200	74.6600	-0.21
GBPINR	95.3275	94.6200	-0.74
JPYINR	59.7450	59.1650	-0.97
FII/DII CAPITAL MKT*	BUY	SELL	NET
FII	3923.97	2947.06	976.91
DII	1900.64	1940.09	-1022.58
FII/DII DERIVATIVES MKT*	BUY	SELL	NET
INDEX FUTURES	2011.71	1272.10	739.61
INDEX OPTIONS	32865.61	33944.10	-1078.49
STOCK FUTURES	5335.64	6417.49	-1081.85
STOCK OPTIONS	2546.14	2745.69	-199.54

## IMPORTANT MARKET HIGHLIGHTS

A divergent trend was witnessed between the two key benchmark indices, with the barometer index, the S&P BSE Sensex, registering small losses and the 50-unit Nifty 50 index ending with minuscule gains based on provisional closing data. The Sensex fell 29.79 points or 0.12% at 25,300.70, as per the provisional closing data. The Nifty rose 1.60 points or 0.02% at 7,716.50 as per the provisional closing data. After languishing in red almost throughout the trading session, the two key benchmark indices staged a rebound in late trade.

Telecom stocks edged higher as a delay in the launch of mobile broadband service from Reliance Jio will give other telecom players time to consolidate their position in the market. Bharti Airtel (up 1.17%), Idea Cellular (up 2.79%) and Tata Teleservices (Maharashtra) (up 5.38%) gained. MTNL (down 1.14%) and Reliance Communications (down 0.29%) fell.

Index heavyweight and software major Infosys advanced 1.86% to Rs 1,212. The stock hit high of Rs 1,212 and low of Rs 1,181.95 in intraday trade.

The size of the overall Indian anti-diabetes market is more than Rs 8400 crore (includes Type 1 & 2), growing at approximately 21% year on year (IMS February 2016 MAT). The top 5 players (which includes Sun Pharma) cumulatively account for 50% of this market.

MARKET TURNOVER	22-Mar	23-Mar	NET%
NSE CASH	17496.41	15928.46	-9.84
BSE CASH	3117.71	3105.87	-0.38
NSE FUTURES	45795.92	44557.83	-2.78
NSE OPTIONS	243810.32	256830.22	5.07
ADVANCE / DECLINE	ADV	DEC	UNCH
NSE	759	783	86
BSE	1285	1308	180
NIFTY GAINER	22-Mar	23-Mar	% CHG
HINDALCO	87.00	91.30	4.94
IDEA	102.05	104.95	2.84
TATASTEEL	309.80	317.20	2.39
BHARTIARTL	350.90	358.20	2.08
YESBANK	832.20	849.25	2.05
NIFTY LOSER	22-Mar	23-Mar	% CHG
RELIANCE	1029.20	1047.85	-1.78
BANKBARODA	144.00	146.50	-1.71
LUPIN	1524.15	1549.05	-1.61
PNB	84.70	85.95	-1.45
GAIL	356.10	361.05	-1.37
CASH SEGMENT VOLUME TOPPERS	22-Mar	23-Mar	VALUE (In crore)
JUSTDIAL	703.05	741.60	537.88
RELIANCE	1047.85	1029.20	396.26
INFY	1189.95	1207.80	378.69
ICICIBANK	233.60	234.20	359.76
YESBANK	832.20	849.25	354.18
TOP TRADED STOCK FUTURE	EXP. DATE	TRADE VALUE (Rs.)	NO. OF CONTRACTS
RELIANCE	31/03/2016	10469520375	20277
SBIN	31/03/2016	5996438200	15273
AXISBANK	31/03/2016	6058464800	13825
TATASTEEL	31/03/2016	8337769600	13285
ICICIBANK	31/03/2016	5233284165	13201
TOP TRADED STOCK OPTION	STRIKE PRICE	OPTION TYPE	NO. OF CONTRACTS
RELIANCE	1040	CE	5558
RELIANCE	1060	CE	5483
SBIN	200	CE	4720
ASHOKLEY	105	CE	3451
ASHOKLEY	110	CE	3444

## CORPORATE NEWS

- Graphite India surges after large bulk deal
- RIL declines on reports Reliance Jio 4G launch may witness delay
- Volumes jump at Graphite India counter
- New orders boost Pennar Engineered Building Systems
- RIL slides on profit booking
- PNC Infratech gains after commissioning road project
- Bank stocks edge lower as S&P says asset quality to remain under pressure
- Kotak Mahindra Bank gains after RBI notifies 55% foreign investment ceiling
- L&T inches up after securing orders
- Edelweiss Financial Services gains after announcing acquisition of JP Morgan's MF business in India
- Tata Chemicals drops after temporary shutdown of Babrala fertiliser plant
- Kalpataru Power jumps after securing new orders

MOST ACTIVE CALLS	EXP. DATE	STRIKE PRICE	LTP
NIFTY	31-Mar-16	7800	19.00
NIFTY	31-Mar-16	7700	65.00
NIFTY	31-Mar-16	7900	4.70
NIFTY	31-Mar-16	8000	1.50
BANKNIFTY	31-Mar-16	16000	113.00
MOST ACTIVE PUTS	EXP. DATE	STRIKE PRICE	LTP
NIFTY	31-Mar-16	7700	37.95
NIFTY	31-Mar-16	7600	15.95
NIFTY	31-Mar-16	7500	6.90
NIFTY	31-Mar-16	7400	3.50
NIFTY	31-Mar-16	7200	1.10
INDICES LEVEL	NIFTY 50	SENSEX	NIFTY IT
CLOSE	7716.50	25337.56	11228.15
R3	7817.15	25709.38	11441.55
R2	7760.90	25498.39	11320.65
R1	7738.70	25417.97	11274.40
PIVOT	7704.65	25287.40	11199.75
S1	7682.45	25206.98	11153.50
S2	7648.40	25076.41	11078.85
S3	7592.15	24865.42	10957.95
ADR PRICE	LTP	VOLUME	%CHG
Dr. Reddy's Lab	45.09	197789	-0.04
H D F C Bank	58.53	465262	-0.48
I C I C I Bank	6.87	8424091	-0.15
Infosys Technologies	18.81	3000098	0.80
MakeMy Trip Ltd.	18.28	246382	0.49
REDIFF.COM	0.77	27910	-3.75
SATYAM INFOWAY	1.27	55385	2.42
Tata Motors	27.59	917669	0.25
Wipro	12.40	388981	0.73
BULK DEALS	BUY/SELL	QUANTITY	TRADE PRICE
ALPA	BUY	515353	39.65
ALPA	BUY	515353	39.65
BSELINFRA	BUY	458605	3.96
GALLANTT	BUY	655000	27.40

## MARKET OUTLOOK

<b>NIFTY 50</b>	<b>0.02%</b> ▲
NET CHG	1.60
OPEN	7717.45
HIGH	7726.85
LOW	7670.60
CLOSE	7716.50

<b>SENSEX</b>	<b>0.03%</b> ▲
NET CHG	7.07
OPEN	25322.10
HIGH	25367.81
LOW	25156.82
CLOSE	25337.56

<b>NIFTY IT</b>	<b>0.19%</b> ▲
NET CHG	21.55
OPEN	11219.70
HIGH	11246.00
LOW	11125.10
CLOSE	11228.15



Nifty View 28 March 2016 (Previous Close 7716):

Yesterday, Post Gap up opening, Index got support @ 7610-7620 & moved further upto 7710-7715 & finally closed 1.31% positive for the day.

Going Forward,

Till Index holds supports of 7673-7678, further upmove upto 7770-7790 will be on cards.

Break-Down below 7673, will lead to a retest of 7620-7580.

On the Derivatives Front, Yesterday, Highest OI has shifted from 7500 to 7700-7800 calls (59-57 Lakhs) with significant additions to the tune of 9 Lakhs in 7800 Calls & unwinding to the tune of 12 & 8 lakhs in 7600-7700 Calls.

On the Put side, Highest OI is witnessed in 7600-7500 Strike (56-54 Lakhs) with additions of 19 & 27 Lakhs in 7700-7600 Puts implies that on a broader time-frame, 7595-7615 would be a stronger support for the series & 7550-7560 is a strong resistance and this will act as a supply zone.

Trading Range: 7650 – 7780.

## PIVOT TABLE

SCRIP	HIGH	LOW	CLOSE	S3	S2	S1	PIVOT	R1	R2	R3
ACC	1400.00	1358.10	1372.65	1293.12	1335.02	1353.83	1376.92	1395.73	1418.82	1460.72
ADANI PORTS	243.20	237.35	238.30	227.92	233.77	236.03	239.62	241.88	245.47	251.32
AMBUJACEM	232.90	226.25	228.25	215.83	222.48	225.37	229.13	232.02	235.78	242.43
ASIANPAINT	856.90	846.25	850.00	829.75	840.40	845.20	851.05	855.85	861.70	872.35
AXISBANK	441.25	435.10	437.50	425.65	431.80	434.65	437.95	440.80	444.10	450.25
BAJAJ-AUTO	2364.00	2304.90	2356.40	2223.57	2282.67	2319.53	2341.77	2378.63	2400.87	2459.97
BANKBARODA	145.75	142.85	144.00	138.40	141.30	142.65	144.20	145.55	147.10	150.00
BHARTIARTL	361.40	352.00	358.20	338.40	347.80	353.00	357.20	362.40	366.60	376.00
BHEL	117.80	115.85	116.40	112.78	114.73	115.57	116.68	117.52	118.63	120.58
BOSCHLTD	20543.60	19935.50	20217.50	19016.00	19624.10	19920.80	20232.20	20528.90	20840.30	21448.40
BPCL	880.00	864.20	868.50	839.30	855.10	861.80	870.90	877.60	886.70	902.50
CAIRN	159.60	154.60	158.40	147.53	152.53	155.47	157.53	160.47	162.53	167.53
CIPLA	536.30	525.55	532.80	510.05	520.80	526.80	531.55	537.55	542.30	553.05
COALINDIA	298.50	294.90	298.00	289.93	293.53	295.77	297.13	299.37	300.73	304.33
DRREDDY	3078.75	3031.00	3047.90	2957.05	3004.80	3026.35	3052.55	3074.10	3100.30	3148.05
GAIL	364.00	354.75	356.10	339.78	349.03	352.57	358.28	361.82	367.53	376.78
GRASIM	3827.00	3772.00	3781.00	3683.33	3738.33	3759.67	3793.33	3814.67	3848.33	3903.33
HCLTECH	830.00	813.40	817.70	787.17	803.77	810.73	820.37	827.33	836.97	853.57
HDFC	1167.70	1143.65	1162.75	1109.93	1133.98	1148.37	1158.03	1172.42	1182.08	1206.13
HDFCBANK	1053.05	1040.55	1049.35	1022.65	1035.15	1042.25	1047.65	1054.75	1060.15	1072.65
HEROMOTOCO	2914.70	2864.25	2871.40	2782.55	2833.00	2852.20	2883.45	2902.65	2933.90	2984.35
HINDALCO	91.70	87.90	91.30	82.70	86.50	88.90	90.30	92.70	94.10	97.90
HINDUNILVR	877.35	860.55	873.60	836.90	853.70	863.65	870.50	880.45	887.30	904.10
ICICIBANK	235.00	230.80	234.20	224.93	229.13	231.67	233.33	235.87	237.53	241.73
IDEA	106.50	102.00	104.95	95.48	99.98	102.47	104.48	106.97	108.98	113.48
INDUSINDBK	934.50	925.00	928.05	910.18	919.68	923.87	929.18	933.37	938.68	948.18
INFY	1210.70	1182.10	1207.80	1143.00	1171.60	1189.70	1200.20	1218.30	1228.80	1257.40
ITC	325.10	320.35	324.25	313.73	318.48	321.37	323.23	326.12	327.98	332.73
KOTAKBANK	675.80	655.10	659.95	622.22	642.92	651.43	663.62	672.13	684.32	705.02
LT	1249.00	1230.30	1242.55	1203.22	1221.92	1232.23	1240.62	1250.93	1259.32	1278.02
LUPIN	1558.95	1518.00	1524.15	1451.80	1492.75	1508.45	1533.70	1549.40	1574.65	1615.60
M&M	1261.80	1242.30	1249.35	1212.15	1231.65	1240.50	1251.15	1260.00	1270.65	1290.15
MARUTI	3744.00	3666.45	3736.00	3560.38	3637.93	3686.97	3715.48	3764.52	3793.03	3870.58
NTPC	128.30	126.85	127.35	124.60	126.05	126.70	127.50	128.15	128.95	130.40
ONGC	217.75	211.90	214.60	203.05	208.90	211.75	214.75	217.60	220.60	226.45
PNB	85.95	84.20	84.70	81.45	83.20	83.95	84.95	85.70	86.70	88.45
POWERGRID	139.15	136.95	137.45	133.45	135.65	136.55	137.85	138.75	140.05	142.25
RELIANCE	1046.90	1022.40	1029.20	983.83	1008.33	1018.77	1032.83	1043.27	1057.33	1081.83
SBIN	197.60	195.30	196.60	191.90	194.20	195.40	196.50	197.70	198.80	201.10
SUNPHARMA	852.00	834.60	846.20	809.47	826.87	836.53	844.27	853.93	861.67	879.07
TATAMOTORS	379.45	374.05	377.00	366.03	371.43	374.22	376.83	379.62	382.23	387.63
TATAPOWER	63.40	62.35	62.65	60.70	61.75	62.20	62.80	63.25	63.85	64.90
TATASTEEL	317.90	310.55	317.20	300.52	307.87	312.53	315.22	319.88	322.57	329.92
TCS	2487.90	2457.30	2473.80	2411.80	2442.40	2458.10	2473.00	2488.70	2503.60	2534.20
TECHM	484.65	474.65	479.90	459.73	469.73	474.82	479.73	484.82	489.73	499.73
ULTRACEMCO	3265.00	3186.95	3198.45	3060.70	3138.75	3168.60	3216.80	3246.65	3294.85	3372.90
VEDL	98.20	95.95	96.85	92.50	94.75	95.80	97.00	98.05	99.25	101.50
WIPRO	559.20	545.80	555.75	526.78	540.18	547.97	553.58	561.37	566.98	580.38
YESBANK	851.85	826.45	849.25	791.72	817.12	833.18	842.52	858.58	867.92	893.32
ZEEL	394.75	386.35	388.50	373.07	381.47	384.98	389.87	393.38	398.27	406.67
ZEEL	394.75	386.35	388.50	373.07	381.47	384.98	389.87	393.38	398.27	406.67

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