



Dynamic Levels Morning Report

Indian Markets To Remain Weak Amid Geopolitical Tension

Monday, February 18, 2019

Indian markets to remain weak amid geopolitical tension. The Cash market benchmark Index Small Cap Index made a steep fall of 3.27% last week and closed at 5727 after making a low of 5921. The Index has its crucial support at 5669 which is its 4 months low. On higher side 5925 may acts as a hurdle for SmallCap which is its previous week high level. However if SmallCap breaks 5669 level then the next level is 5409.

The Nifty Index last week closed at 10724 after making a high of 10931 and low of 10620 and fell by 2% in the last week.

US Markets ended higher on Friday after a statement from the White House said high level U.S.-China trade talks led to "progress between the two parties" but "much work remains.

The White House said that U.S. hopes to see additional progress as discussions at the ministerial and vice-ministerial levels continue in Washington this week.

European markets on Friday's session were sharply higher, after comments from an ECB official about a likely fresh round of long-term loans to banks aiding sentiment.

Asian stocks remain broadly higher this morning as investors pinned hopes for progress in the Sino-U.S. trade talks and awaited more policy stimulus from major central banks. The dollar held marginally weak while oil hovered near three-month highs.

Major players of the market FII+PRO in combined have sold 156448 contracts in Index Options in the current expiry, which suggest weakness in the market for the coming days.

| Instrument | LTP |
|---------------------------|---------|
| US 10 Year T-Note Futures | 122.04 |
| S&P 500 Futures | 2778.88 |
| US Dollar Index Futures | 96.580 |

The US 10 Year T-Note is trading at 122.04. The Bond has broken its important low of 120.03 on 2nd Oct 2018.

The US Dollar Index is trading at 96.580.

Sector Performance in last week

| Major Sector | % change |
|---|----------|
| INFRASTRUCTURE CONSTRUCTION AND ENGINEERING | -1.19% |
| FINANCIAL SERVICES | -1.29% |
| POWER | -1.47% |
| FERTILISERS | -2.01% |
| CEMENT & CEMENT PRODUCTS | -2.40% |
| METALS AND MINING | -2.45% |
| ENERGY-OIL & GAS | -2.56% |
| BANKS-PRIVATE AND PSU | -2.74% |
| REALTY | -2.99% |
| PHARMA | -3.10% |
| FMCG | -3.15% |
| IT | -3.20% |
| INDUSTRIAL MANUFACTURING | -3.46% |
| TEXTILES AND APPAREL | -3.67% |
| AUTOMOBILES & AUTO PARTS | -4.05% |
| FMCG-FOOD | -4.40% |
| CHEMICALS | -5.21% |
| Minor Sector | % change |
| SUGAR | 3.93% |
| MEDIA-TV AND NEWSPAPER | 0.52% |
| SERVICES | -0.38% |
| AIRLINES | -0.50% |
| CONSUMER GOODS | -1.61% |
| TRANSPORTATION LOGISTICS | -1.94% |
| HOTELS AND LEISURE | -2.16% |
| HEALTHCARE SERVICES | -2.29% |
| FILMS | -2.67% |
| DEFENCE | -2.79% |
| INTERIOR CONSTRUCTION | -3.24% |
| HOME APPLIANCES | -3.59% |
| GOLD & JEWELLERY | -3.87% |
| BEVERAGES | -4.55% |
| PACKAGING | -5.31% |
| ELECTRICAL EQUIPMENT | -6.46% |
| TELECOM | -6.49% |
| PAPER | -7.81% |
| CARBON | -9.49% |

Large Cap Gainers and Losers in last week

| Weekly Gainers | | |
|---------------------------------------|------|--------|
| Company Name | LTP | % Chg |
| YES BANK | 219 | 25.07% |
| ZEE ENTERTAINMENT ENTERPRISES | 431 | 8.16% |
| TATA MOTORS | 162 | 7.27% |
| ADANI PORTS AND SPECIAL ECONOMIC ZONE | 350 | 5.63% |
| SUN TV NETWORK | 547 | 4.99% |
| Weekly Losers | | |
| Company Name | LTP | % Chg |
| HINDALCO INDUSTRIES | 187 | -9.37% |
| HERO MOTOCORP | 2696 | -8.25% |
| ASHOK LEYLAND | 80 | -8.16% |
| BRITANNIA INDUSTRIES | 2858 | -8.09% |
| STATE BANK OF INDIA | 263 | -8.06% |

Mid cap Gainers and Losers in last week

| Weekly Gainers | | |
|--------------------------------------|-----|---------|
| Company Name | LTP | % Chg |
| DILIP BUILDCON | 450 | 34.32% |
| RELIANCE CAPITAL | 149 | 14.93% |
| DEWAN HOUSING FINANCE CORPORATION | 123 | 12.87% |
| SUN PHARMA ADVANCED RESEARCH COMPANY | 163 | 12.57% |
| ADANI POWER | 39 | 10.53% |
| Weekly Losers | | |
| Company Name | LTP | % Chg |
| NATIONAL ALUMINIUM COMPANY | 49 | -17.72% |
| KRBL | 304 | -15.33% |
| NATCO PHARMA | 587 | -13.95% |
| PC JEWELLER | 68 | -12.17% |
| GRAPHITE INDIA | 430 | -11.07% |

Index Options

FII+PRO in combined have sold 156448 contracts in Index Options in the current expiry

| | FII | PRO | FII+PRO | Client | DII | Nifty | Bank Nifty |
|-----------|----------------------------|----------------------------|--|----------------------------|----------------------------|-------|------------|
| Date | Net OI Index Options (FII) | Net OI Index Options (PRO) | Combined Position | Net OI Index Options (CLI) | Net OI Index Options (DII) | Close | Close |
| | | | FII+PRO in combined have sold 156448 contracts in Index Options in the current expiry | | | | |
| 15-Feb-19 | -69506 | -84853 | -154359(Net OI Till Date) | 231884 | -77525 | 10724 | 26794 |
| 14-Feb-19 | -53807 | -53332 | -107139 | 186892 | -79753 | 10746 | 26971 |
| 13-Feb-19 | -22437 | -155601 | -178038 | 259801 | -81763 | 10794 | 26885 |
| 12-Feb-19 | -19108 | -92786 | -111894 | 193625 | -81731 | 10831 | 27011 |
| 11-Feb-19 | 7652 | -12827 | -5175 | 86320 | -81145 | 10889 | 27228 |
| 8-Feb-19 | 22375 | 271 | 22646 | 57885 | -80531 | 10944 | 27294 |
| 7-Feb-19 | 11642 | 75280 | 86922 | -8661 | -78261 | 11069 | 27387 |
| 6-Feb-19 | -11675 | 88624 | 76949 | -6146 | -70803 | 11062 | 27402 |
| 5-Feb-19 | -20964 | 18246 | -2718 | 68586 | -65868 | 10934 | 27272 |
| 4-Feb-19 | -31455 | 22757 | -8698 | 74536 | -65838 | 10912 | 27187 |
| 1-Feb-19 | -13438 | -10828 | -24266 | 90094 | -65828 | 10894 | 27086 |
| 31-Jan-19 | -17110 | 19199 | 2089(Open Net OI) | 62436 | -64525 | 10831 | 27295 |

Cash Market Data

| DATES | FII | DII | FII+DII |
|-----------|---------|---------|---------|
| 15-Feb-19 | -966.43 | 853.25 | -113.18 |
| 14-Feb-19 | -250.23 | 1225.24 | 975.01 |
| 13-Feb-19 | -676.63 | 713.10 | 36.47 |
| 12-Feb-19 | -466.78 | -122.64 | -589.42 |
| 11-Feb-19 | -125.05 | -232.55 | -357.60 |
| 8-Feb-19 | 843.73 | -960.04 | -116.31 |
| 7-Feb-19 | 418.01 | 294.11 | 712.12 |
| 6-Feb-19 | 694.97 | 525.26 | 1220.23 |
| 5-Feb-19 | 420.65 | 194.31 | 614.96 |
| 4-Feb-19 | -112.13 | -65.00 | -177.13 |

In last 10 days, DII has bought shares in cash segment worth Rs. 2425.04 Crore.



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Report Prepared By:

Vikash Kandoi - NISM-201500086430