



MUTUAL FUND ACTIVITIES IN JULY

MUTUAL FUND	BUY	SELL	COMPLETE EXIT	FRESH BUYS
ICICI	HDFC IOC GAIL	BAJAJ FINSERVE IDEA CELLULAR	HUDCO IRB InvIT La OPALA RG	TAMIL NADU NEWSPRINT MAGMA FINANCE SUZLON ENERGY
HDFC	INFOSYS HDFC BANK HDFC	RELIANCE IND MARUTI VEDANTA	ADITYA BIRLA NUVO ADLABS ENT BALRAMPUR CHINI	GUJARAT PIPAVAV PORT BHARAT FINANCIAL TATA ELIXI
RELIANCE	SHRIRAM TRANSPORT INFOSYS GRASIM IND	ITC PVR AUROBINDO PHARMA	ADITYA BIRLA NUVO ADLABS ENT AKZO NOBEL INDIA	INDIABULLS REAL ESTATE
BIRLA	ITC HERO MOTOCORP HDFC BANK	DR. REDDY'S LAB KAVERI SEEDS GRASIM IND	ADITYA BIRLA NUVO IRB InvIT	GSFC
SBI	AU SMALL FIN HDFC AJANTA PHARMA	SUN PHARMA REDINGTON INDIA INFOSYS	30 PLM SOFTWARE	UJJIVAN FINANCIAL APOLLO TYRES

Top Fund Manager in July have picked up companies which have beaten street estimates and emerged as turnaround stories.

Titan Company – Beneficiary of GST rollout. Company might gain market share in coming quarters, which is expecting a growth of 20% in revenue for next two years.

Suzlon Energy – Renewable energy is gaining lot of traction with the govt's aggressive wind installation target. Suzlon might gain market share in coming years because of which the company has turned profitable in June 2017 Quarter and the company's order book pipeline has increased dramatically.

Tata global beverages – Consistent expansion in market share in Tea segment in India and overseas. Company is going to benefit on cost side due to focus on non black tea segment. Besides this, company has joint venture with Starbucks and PepsiCo India.



Ramakrishna Forgings – Company’s expanded capacity (doubled capacity to 151,200 MTPA) during cyclical downturn in the domestic CV industry. With recovery expected in domestic and export demand, company is going to benefit in coming years as operating leverage will kick in.

DCB Bank – Bank is expected due improve its operational efficiencies. Company has even shed large part of risky unsecured loan book. Management has guided on doubling the bank’s balance sheet in three to four years. We believe that bank’s lower exposure to stressed sector is going to work in its favour.

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