

16.07.2025

DAILY MARKET WRAP UP

SENSEX

INTRADAY CHART

TODAY SENSEX OPENED FLAT WITH A DOWNSIDE GAP OF 36.25 POINTS AND DURING THE DAY AFTER TRADING LOWER IT MADE A RECOVERY AND MANAGED TO CLOSE UP BY 63.57 POINTS OR 0.08% SETTLED AT 82634.48.

BSE SENSEX

82,634.48 +63.57 +0.08%

16 Jul 25

Previous Close :82,570.91

Open :82,534.66

High :82,784.75

Low :82,342.94



WEEKLY TECHNICALS:



SUPPORT

S1: 82100 (SHORT TERM) BROKEN

S2: 78540 (MID TERM)

S3: 75075 (LONG TERM)

S4: 72012 INTACT

RESISTANCE

R1: 75010 (BROKEN UPWARDS)

R2: 78540 (BROKEN UPWARDS)

R3: 82100(BROKEN UPWARDS)

TODAY'S GAINERS

SBIN: THE SHARE WAS UP TODAY AS THE COMPANY IS LIKELY TO LAUNCH A QIP OF 25000 CR.

TODAY'S OTHER GAINERS WERE, M&M, TECH MAHINDRA AND INFOSYS.

TODAY'S LOSERS

THE LOSERS WERE ETERNAL, TATA STEEL, TATA MOTORS AND SUN PHARMA.

NIFTY 50

INTRADAY CHART

TODAY NIFTY OPENED FLAT WITH AN UPSIDE GAP OF 0.8 POINTS AND DURING THE DAY IT TOO FOLLOWED THE SAME TREND AS OF SENSEX AND CLOSED UP BY 16.25 POINTS OR 0.06% SETTLED AT 25212.05.

NIFTY 50 >

Updated: 16-Jul-2025

25,212.05

● Open

25,196.60

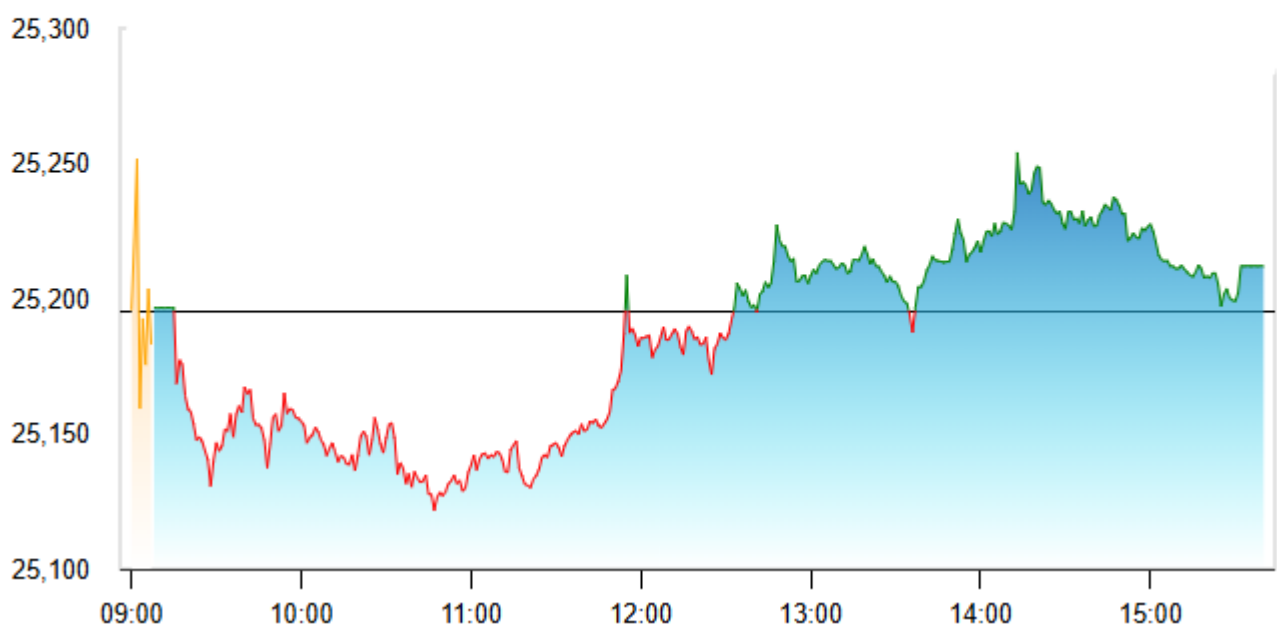
● High

25,255.30

● Low

25,121.05

16.25 (0.06%)



WEEKLY TECHNICALS:



SUPPORT

S1: 24340 (SHORT TERM) BROKEN
S2: 23940 (MID TERM)
S3: 22790 (LONG TERM)
S4: 21883 INTACT

RESISTANCE

R1: 22790 (BROKEN UPWARDS)
R2: 23940 (BROKEN UPWARDS)
R3: 24340 (BROKEN UPWARDS)

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INVESTMENTS
TODAY'S GAINERS

TODAY'S GAINERS WERE M&M, WIPRO, TECH MAHINDRA AND NESTLE INDIA.

TODAY'S LOSERS

TODAY'S LOSERS WERE SHRI RAM FINANCE, SUN PHARMA, ETERNAL AND CIPLA.

MIDCAP INDEX

INTRADAY CHART

THE MID CAP INDEX OPENED WITH AN UPSIDE GAP OF 47.21 POINTS AND DURING THE DAY IT AFTER A VOLATILE SESSION IT CLOSED UP BY 47.60 POINTS OR 0.10% SETTLED AT 47033.02.

BSE MidCap

47,033.02 +47.60 +0.10%

16 Jul 2025

Previous Close :46,985.42

Open :47,032.63

High :47,132.75

Low :46,939.26



WEEKLY TECHNICALS:



SUPPORT

S1: 45270(SHORT TERM) BROKEN

S2: 44105 (MID TERM) BROKEN

S3: 39450 (LONG TERM)

S4: 38050 INTACT

RESISTANCE

R1: 39450(BROKEN UPWARDS)

R2: 44105(BROKEN UPWARDS)

R3: 45270(BROKEN UPWARDS)

TODAY'S GAINERS,

TODAY'S GAINERS WERE, PATANJALI, THERMAX, GLAND PHARMA AND STAR HEALTH.

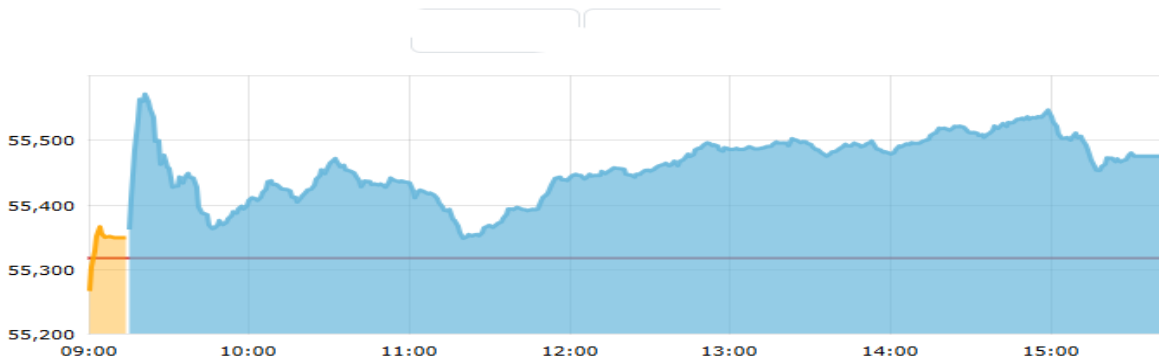
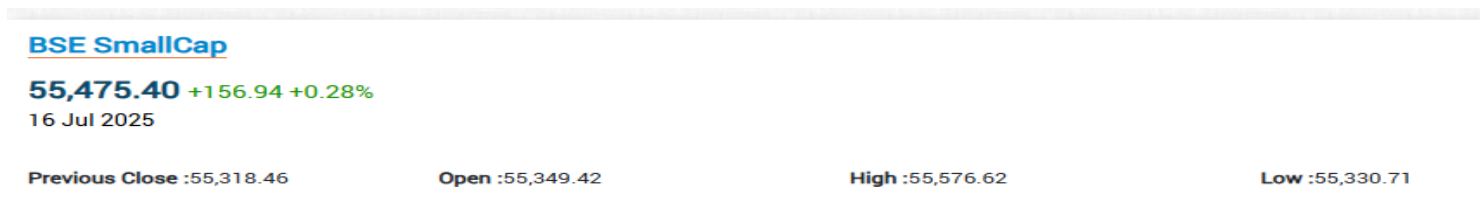
TODAY'S LOSERS

THE LOSERS WERE OLA ELECTRIC, PAGE IND, POLICY BAZAR AND JSL.

SMALL CAP INDEX

INTRADAY CHART

THE SMALL CAP INDEX OPENED WITH AN UPSIDE GAP OF 30.96 POINTS AND DURING THE DAY IT MANAGED TO MAINTAIN THE MOMENTUM AND CLOSED UP BY 156.94 POINTS OR 0.28% SETTLED AT 55475.40.



WEEKLY TECHNICALS:



SUPPORT

S1: 55495 (SHORT TERM) BROKEN

S2: 51920 (MID TERM) BROKEN

S3: 45945 (LONG TERM) (BROKEN)

S4: 43750

RESISTANCE

R1: 45945 (BROKEN UPWARDS)

R2: 51920 (BROKEN UPWARDS)

R3: 55495

TODAY'S GAINERS.

NETWORK 18: THE SHARE WAS UP TODAY AS THE COMPANY REPORTED A GOOD Q1 NUMBERS.

THE OTHER GAINERS WERE MLCLOUD, TI AND SHREE DIGVIJAY CEMENT.

TODAY'S LOSERS

THE LOSERS WERE AFSL, GEOJIT FINANCIAL, DYCL AND NEULAND LABS.

FII AND DII NET POSITION

15.07.2025:

FII CASH MARKETS: 120.47

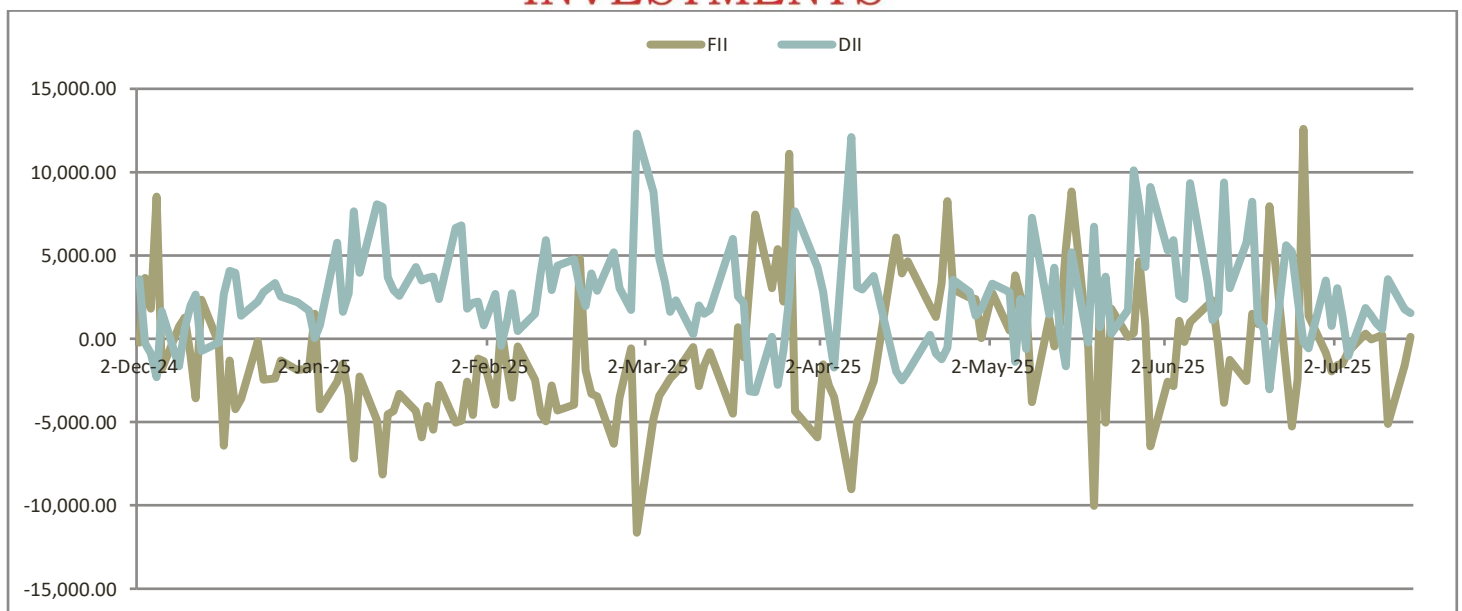
BOUGHT 120.47 CR IN NET POSITION

DII CASH MARKETS: 1555.03

BOUGHT 1555.03 CR IN NET POSITION

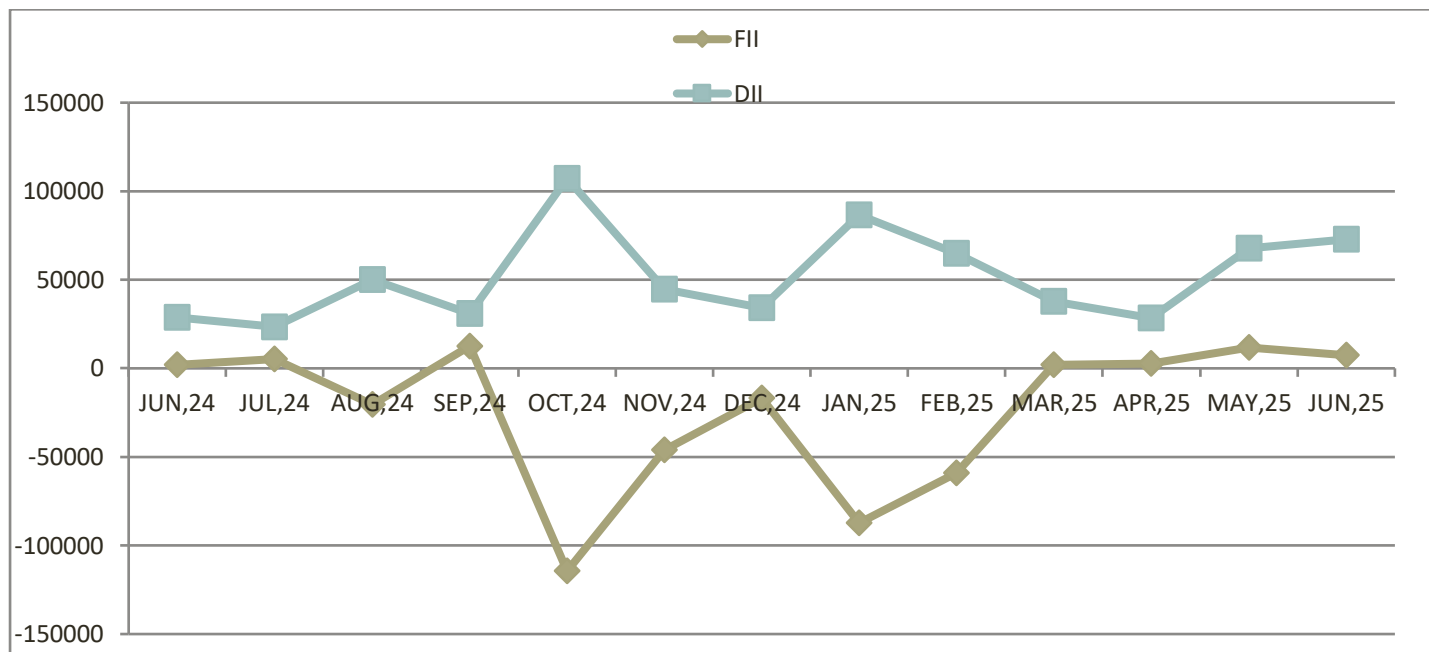
DAILY POSITION FROM 02.12.2024 TO 15.07.2025


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INVESTMENTS



DURING THIS PERIOD FII SELLING WHICH VISIBLY SUBSIDED TILL MARCH STARTED FRESH BUYING WHEREAS DOMESTIC WHICH RESORTED TO INTERMITTENT BUYING AND SELLING TOO JUMPED INTO THE FRAY RELEASING PRESSURE ON THE MARKETS WITH UPWARD MOMENTUM.

MONTHLY POSITION



ON MONTHLY BASIS FII SELLING IS TRYING TO BE COUNTER BALANCED BY DII BUYING. FIIS AFTER SEVEN CONSECUTIVE MONTHS SINCE SEP 2024 THEY TURNED NET BUYERS DURING THE MONTH OF APR 2025. AND FOR THE MONTH OF JUNE BOTH FIIS AND DIIS TURNED NET BUYERS GIVING A FILIP TO THE UPSIDE OF THE MARKETS.

VALUATIONS

INDEX	EPS 1 YEAR TTM	PRICE	P/E 1 YEAR TTM
SENSEX	3503.2	82634.48	23.6
NIFTY 50	1110.9	25212.05	22.7
BSE MID CAP	1295.1	47033.02	36.3
BSE SMALL CAP	1697.4	55475.40	32.6

SOURCE:TRENDLYNE.COM

GLOBAL INDICES

GLOBAL INDICES ARE MIXED

US MARKETS AS ON 15.07.2025

	PRICE	CHANGE
DOW	44023.29	-436.36
NASDAQ	20677.80	+37.47

EUROPEAN MARKETS 16.07.2025 AT 03:30 PM

FTSE 100	8951.36	+13.04
DAX	24107.04	+46.75
CAC 40	7766.30	+0.09

ASIAN MARKETS 16.07.2025 AT CLOSE

NIKKEI 225	39663.40	-14.62
HANG SENG	24517.76	-72.36
KOSPI	3186.38	-28.90
TAIWAN SE	23042.90	+206.96
SHANGHAI COMPOSITE	3503.78	-1.22



INTRA DAY CHART

THE FUTURES OPENED LOWER BUT NOW TRADING FLAT

E-mini Dow (\$5) Continuous Contract

\$44,251.00 ↑ 0.0090% +4.00 Today

Jul 16, 10:05:51 AM UTC - USD - CBOT - Disclaimer

1D 5D 1M 6M YTD 1Y 5Y MAX



GOLD

INTRA DAY CHART

GOLD OPENED HIGHER AND STILL TRADING HIGHER.

Gold Continuous Contract

\$3,345.00 ↑ 0.25% +8.30 Today

Jul 16, 10:06:39 AM UTC · USD · COMEX · Disclaimer

1D 5D 1M 6M YTD 1Y 5Y MAX



WEEKLY TECHNICALS:

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THE CHART SHOWS GOLD PRICES ARE IN A RISING TRAJECTORY AFTER BREAKING OUT OF THE CONSOLIDATION ZONE DUE TO UNCERTAINTIES CREATED BY WORLDWIDE TRADE TARIFF WARS AND BUYING BY CENTRAL BANKS.

DURING THE LAST FOUR MONTHS THE BUYING BY CENTRAL BANKS ACROSS THE GLOBE REACHED 1000 TONNES ANUALLY WHICH EARLIER USED TO BE ONLY 400 TO 500 TONNES ANNUALLY.

HOWEVER CHINA CENTRAL BANK BOUGHT ONLY 16-18 TONNES IN THE PAST FEW MONTHS. WHICH EARLIER HAS BEEN BUYING 200 TO 500 TONNES ANUALLY IT REMAINS TO BE SEEN WHETHER IT CAN

SUSTAIN HEAVY BUYING GIVEN ITS CURRENT ECONOMIC TRAVAILS. (AS REPORTED IN BUSINESS STANDARD DATED 24.03.2025)

SUPPORT

S1: 3200 R1: 3400

S2: 2950

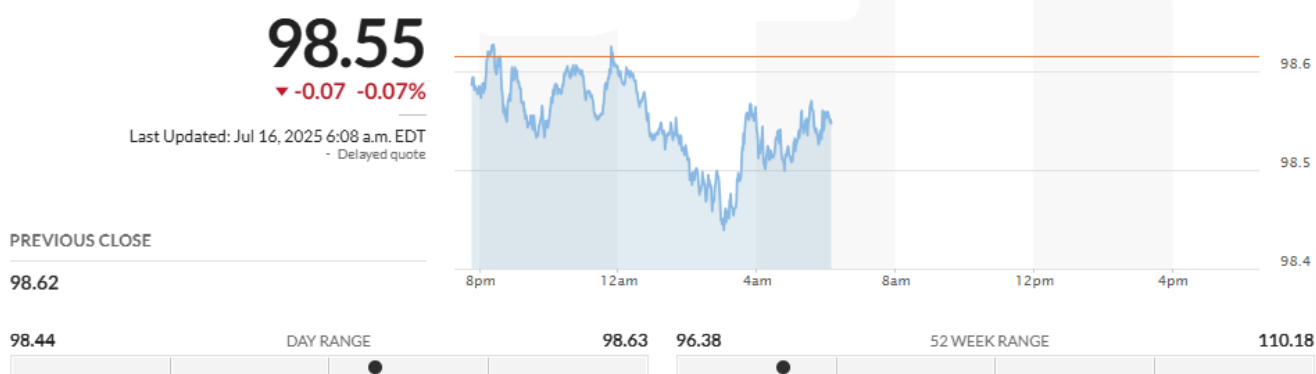
S3: 2800

DOLLAR INDEX

INTRA DAY CHART

DOLLAR INDEX OPENED LOWER AND STILL TRADING LOWER.

U.S. Dollar Index (DXY)



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WEEKLY TECHNICALS:



THE DOLLAR INDEX IS HAS WEAKENED AS THE DEMAND FOR DOLLAR IS NOW DIMNISHING WHICH EARLIER HAS BEEN CONTINUOUSLY SURGING FOR IMPORT AND TRADE PURPOSES.

SECONDLY DUE TO BUYING BY FIIS RECENTLY.

THIRDLY THERE HAVE BEEN CONSISTENT DOLLAR SALES FROM FOREIGN BANKS.

FOURTHLY FROM STRONG CORPORATE REPATRIATION AHEAD OF THE FINANCIAL YEAR ENDS. (AS REPORTED IN BUSINESS STANDARD DATED 25.03.2025).

RESISTANCE

R1: 99.30

R2: 104.85

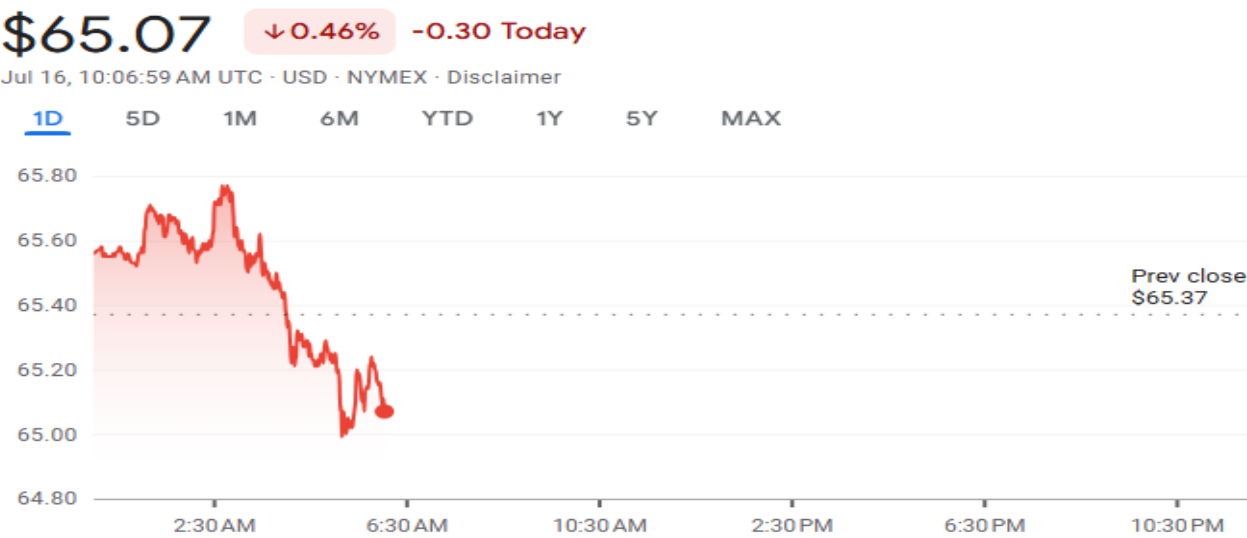
R3: 109.50

CRUDE OIL

CRUDE OIL INDEX OPENED HIGHER BUT NOW TRADING LOWER.

INTRA DAY CHART

Crude Oil Continuous Contract



WEEKLY TECHNICALS:



SUPPORT

S1: 66 (BROKEN)

RESISTENCE

R1: 85.30

R2: 93.58

MEDIUM TERM FACTORS:

- 1) FIRST OFFICIAL DATA HAS SHOWN THAT US GASOLINE AND DISTILLATES STOCK PILES GREW MORE THAN EXPECTED, REFLECTING WEAKER DEMAND IN THE WORLDS LARGEST ECONOMY.
- 2) SECOND ADDING TO THE WEAKNESS, SAUDI ARABIA THE WORLDS BIGGEST OIL EXPORTER, CUT ITS JULY PRICES FOR ASIAN CRUDE BUYERS TO NEARLY THE LOWEST IN TWO MONTHS.
- 3) THIRD THE PRICE CUT BY SAUDI ARABIA FOLLOWED THE OPEC+ MOVE OVER THE WEEKEND TO INCREASE OUTPUT BY 411000 BARRELS PER DAY FOR JULY.
- 4) SERVICE ACTIVITY IN CHINA- THE WORLD'S BIGGEST OIL IMPORTER EXPANDED AT ITS SLOWEST PACE IN NINE MONTHS IN JUNE AS DEMAND WEAKENED AND NEW EXPORT ORDERS DECLINED. **(SOURCE: ECONOMIC TIMES DATED 04.07.2025).**
- 5) A SURPRISE BUILD IN U.S. CRUDE INVENTORIES ALSO HIGHLIGHTED DEMAND CONCERNS IN THE WORLD'S BIGGEST CRUDE CONSUMER. **(SOURCE: ECONOMIC TIMES DATED 04.07.2025).**
- 6) OIL DEMAND WILL BE SHAPED BY TRADE NEGOTIATIONS BETWEEN THE US AND ITS TRADING PARTNERS **(SOURCE: ECONOMIC TIMES DATED 06.06.2025).**

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MAJOR RESULTS TO BE DECLARED TODAY:

INVESTMENTS

- 1) ITC HOTELS
- 2) TECH MAHINDRA
- 3) ANGEL ONE
- 4) KABRA EXTRUSION
- 5) LTTS.

EQUITY MARKET TRIGGERS

POSITIVE TRIGGERS

RESERVE BANK OF INDIA:

- 1) RATE CUT IN CRR BY 100 BPS ON JUNE 6 2025.
- 2) RATE CUT IN REPO RATE BY 50 BASIS POINTS ON JUNE 6 2025.
- 3) 25 BASIS POINTS REDUCTION IN REPO RATE ON APRIL 9 2025.

ECONOMIC HIGHLIGHTS:

RURAL DEMAND

UPSHOOTS IN RURAL DEMAND DUE TO KHARIF OUTPUT ON ACCOUNT OF GOOD RAINS AND SECONDLY INCREASE IN MSP. INFLATION RATE EASINESS IN FUTURE ON ACCOUNT OF GOOD RABI CROP AND ADEQUATE RESERVOIRS.

KHARIF SOWING

KHARIF SOWING HAS BEEN NEARLY 10% HIGHER THIS YEAR TILL JUNE 2025 FOLLOWING A GOOD RABI HARVEST SAYS PARAS JASRAI ASSOCIATE DIRECTOR INDIA RATINGS. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

RURAL WAGE

GROWTH IN RURAL WAGES IS DRIVING THE RURAL DEMAND THOUGH THE RURAL DEMAND IS STILL NOT BROADBASED BUT IS GAINING MOMENTUM. SAYS IDFC CHIEF ECONOMIST GAURAV SENGUPTA. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

INFORMAL SECTOR

THE INFORMAL SECTOR IS TAKING THE LEAD. STRONG INDIRECT TAX COLLECTION, MSME CREDIT AND WAGE GROWTH IN SMALL FIRMS HIGHLIGHT THE IMPROVEMENT IN THE INFORMAL SECTOR. AS A RESULT FIRST QUARTER OF 2025-26 COULD SEE A GROWTH OF 6.7 % SAYS HSBC GLOBAL RESEARCH ECONOMISTS **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**
GROWTH IN THE CONSTRUCTION SECTOR DURING THE FIRST QUARTER 25-26 WAS ALSO GOOD WHILE INFRASTRUCTURE AND CAPITAL GOODS ARE DOING WELL OWING TO AN UPTICK IN GOVT CAPEX. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

INPUT PRICES

INPUT PRICES HAVE BEEN STILL REMAINED BENIGN. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

RETAIL INFLATION

RETAIL INFLATION AT 2.10% FOR JUN 25 VS 2.82% IN MAY 25 WHICH IS BELOW 3.7% TARGET RBI RATE. **(DATED 14.07.2025)**

THE INFLATION RATE IS EXPECTED TO BE 4.4 % IN FY26 FROM 4.7% EARLIER WHICH INDICATES COOLING DOWN IN INFLATION.

GENERAL CAPITAL EXPENDITURE

GENERAL CAPITAL EXPENDITURE HAS PICKED UP PACE DUE TO FRONT LOADING BY BOTH THE CENTRE AND THE STATES. SAYS IDFC CHIEF ECONOMIST GAURAV SENGUPTA. **(SOURCE: BUSINESS STANDARD JULY 3, 2025)**

URBAN DEMAND

SLOWDOWN IN URBAN DEMAND DUE TO SLOW WAGE INCREASE AND INFLATIONARY PRESSURES NOW ABATING AND RATHER GREEN SHOOT IN URBAN DEMAND ON ACCOUNT OF LOWER INPUT COSTS ARE VISIBLE.

MONSOON

IMD PREDICTED ABOVE NORMAL MONSOON IN 2025 WHICH 105% OF LONG PERIOD AVERAGE (LPA) SECOND YEAR IN A ROW KEEPING FOOD INFLATION UNDER CONTROL. **(DATED 15.04.2025)**

INTERNATIONAL HIGHLIGHTS:

- 1) US HAS GIVEN A PAUSE IN TARRIFS WITH A BASELINE OF 10% FOR 90 DAYS IS A BIG RELIEF
- 2) MORE THAN 75 COUNTRIES HAVE REACHED OUT TO US TO DISCUSS NEW TRADE DEALS.
- 3) US COMPANIES LOOKING TO RELOCATE THEIR MANUFACTURING FROM CHINA TO INDIA AS GLOBAL SUPPLY CHAINS REALIGNMENT ACROSS ELECTRONICS, TOYS AND PHARMACEUTICALS.
- 4) THE FIRST UK – US TRADE DEAL CONCLUDED POSITIVE AS THE DEAL CUTS DUTY TO 10 % FOR UK CARS.
- 5) THE US HAD AGREED TO PARE BACK TARRIFS ON CHINESE IMPORTS FROM A COMBINED 145 % TO 30 % IN RETURN CHINA WILL REDUCE TARRIFS ON US GOODS TO 10 % FROM 125% FOR 90 DAYS.(DATED 12.05.2025)
- 6) INDIAN EXPORTERS WILL FACE A 10% BASELINE FOLLOWING THE SUSPENSION OF COUNTRY SPECIFIC RECIPROCAL TARRIFS THROUGH JULY 8.

NEGATIVE TRIGGERS

INTERNATIONAL HIGHLIGHTS:

GLOBAL MERCHANDISE TRADE

WTO SHARPLY DOWNGRADING IT'S FORECAST FOR GLOBAL MERCHANDISE TRADE VOLUME IN 2025 TO 0.2 % CONTRACTION FROM ITS EARLIER GUIDANCE OF 2.75% GROWTH AFTER FACTORING IN THE 10% BASE LINE TARRIFS IMPOSED BY THE US.

CHINA'S GDP GROWTH

CHINA'S GDP GROWTH IS EXPECTED TO SLOW TO 3.8% IN 2025 FROM 4.5 % FORECASTED EARLIER BY MOODY'S RATINGS, WHILE US ECONOMIC GROWTH IS ANTICIPATED TO SLOW TO 1 % COMPARED TO 2 % PROJECTED IN THE FEBRUARY OUTLOOK. THE RATINGS AGENCY HAS CUT THE GLOBAL GROWTH FORECAST TO 1.9 % FOR 2025 FROM ITS PREVIOUS PROJECTION OF 2.5 %.(SOURCE: ECONOMIC TIMES DATED 07.05.2025)

US GROWTH

THE US GROWTH FORCAST HAS BEEN REVISED DOWNWARD TO 1.4 % IN 2025 FROM 2.3% PROJECTED IN THE JAN BY THE WORLD BANK (SOURCE: ECONOMIC TIMES DATED: 11 JUNE 2025).

TENSIONS IN WEST ASIA

ISRAEL'S STRIKES ON IRAN ESCALATED TENSIONS IN WEST ASIA. (SOURCE: BUSINESS STANDARD DATED 14.06.2025)

WEST ASIA WAS THRUST INTO RENEWED CONFLICT AFTER ISRAEL LAUNCHED STRIKES AGAINST IRAN SAYING IT TARGETED NUCLEAR FACILITIES, BALLASTIC MISSILE FACTORIES AND MILITARY COMMANDERS AND THAT THIS WAS THE START OF A PROLONGED OPERATION TO PREVENT TEHRAN FROM BUILDING AN

ATOMIC WEAPON. IRAN LAUNCHED ABOUT 100 DRONES TOWARDS ISRAELI TERRITORY IN RETALIATION (SOURCE: BUSINESS STANDARD DATED 14.06.2025).

FED'S STANCE

FED'S HAWKISH STANCE ON FUTURE RATE CUTS.

DOMESTIC HIGHLIGHTS:

REAL GDP GROWTH

RBI HAD DECREASED THE REAL GDP GROWTH TARGET FROM 6.70 TO 6.50.

MONETARY POLICY

RBI HAD CHANGED IT MONETARY POLICY STANCE FROM 'ACCOMODATIVE TO 'NEUTRAL'.

VALUATION

VALUATION CONCERNS IS NOW GIVING WAY TO SLIGHTLY OVER VALUED MARKETS. THERE IS CAUTION IN THE AIR.

REQUIRED EARNINGS GROWTH (%) TO JUSTIFY EXISTING VALUATION (Calculations are based on analysis of 3- year forward P/E of various indices.)

INDEX	ESTIMATES GROWTH	REQUIRED GROWTH
NIFTY 50	10.4	14.4
NIFTY MIDCAP 100	17.4	28
NIFTY SMALL CAP 100	16.9	30.6
NIFTY 500	10.9	16
WORLD	14	18
US NASDAQ	19.9	26.1

(SOURCE: RBI'S FINANCIAL STABILITY REPORT FOR JUNE 2025)

PRIVATE CAPEX

NEW INVESTMENT PROJECTS FROM THE PRIVATE SECTOR SLIP TO RS 1.4 TRILLION IN FIRST QUARTER FY25-26, 81.35% LESS THAN 21.7 TRILLION RUPEES WORTH OF OUTLAYS IN THE PREVIOUS QUARTER SAYS CMIE.(SOURCE: BUSINESS STANDARD DATED JULY 3,2025). THIS MARKS A SHARP SLOWDOWN IN PRIVATE CAPEX.

INDUSTRIAL ACTIVITY

UNCERTAINTY DUE TO THE TARRIF WAR AND UNSEASONAL RAINFALL DAMPENED INDUSTRIAL ACTIVITY PARTICULARLY ELECTRICITY AND MINING; GROWTH IN THE MANUFACTURING SECTOR REMAINED SUBDUED IN FIRST QUARTER FY 25-26 AND EXPORTS HAVING FARED BADLY AFTER GOOD SHOWING IN APRIL DUE TO TARRIF WARS.

GROWTH DURING FIRST QUARTER F.Y. 26 COULD NOT OUTPACE THE GROWTH IN THE CORRESPONDING QUARTER OF THE PREVIOUS YEAR. AS A RESULT URBAN DEMAND CONTINOUS TO FACE HEADWINDS. SAYS PARAS JASRAI ASSOCIATE DIRECTOR INDIA RATINGS. (SOURCE: BUSINESS STANDARD DATED JULY 3, 2025).

LONG TERM TRIGGERS

SHARE IN GLOBAL FUNDS:

INDIA'S SHARE IN GLOBAL FUNDS WILL RISE SHARPLY

INFLOW:

INFLOW OF 1.5 TRILLION DOLLAR ON A 5 TRILLION DOLLAR MARKET CAPTILISATION IS EXPECTED

DOMESTIC EQUITY EXPOSURE:

DOMESTIC EQUITY EXPOSURE COULD TREBLE FROM 5 % TO 15 % IN 10 TO 15 YEARS

DOUBLE CAPEX:

INDIA INC TO **DOUBLE CAPEX** TO 850 BN DOLLARS IN 5 YEARS SALES SMP REPORT. POWER AND TRANSMISSION, AIRLINE AND GREEN HYDROGEN SECTORS WOULD SPEAR HEAD THE SPENDING DRIVEN BY STRONG BALANCE SHEETS, ROBUST OPERATING CASH FLOWS AND FAVOURABLE GOVT POLICY. THE POWER AND TRANSMISSION SECTOR WOULD ACCOUNT FOR 300 BN DOLLARS IN NEW INVESTMENT. RE PROJECTS AND GRID INFRASTRUCTURE ARE EXPECTED TO DOMINATE AS INDIA PERSUES ITS 500 GW RENEWABLE CAPACITY TARGET BY 2030. (DATED: JUNE 10 2025 SOURCE: BUSINESS STANDARD)

INVESTMENTS

SECTORAL INDICES

OUTPERFORMING SECTORS

THE OUTPERFORMING SECTORS INCLUDE TELECOM, CHEMICALS, PVT BANKING, PSU BANKS, DEFENCE AND FINANCIAL SERVICES.

UNDEPERFORMING SECTORS

THE UNDER PERFORMING SECTORS INCLUDE PHARMA AND HEALTHCARE, CPSE, ENERGY, FMCG, AUTO, AUTOANCILLARY, REAL ESTATE AND METALS.

OUTLOOK

SECTOR OVERWEIGHTS: PHARMA, HEALTHCARE, CHEMICALS, TELECOM, FINANCIAL SERVICES, PVT BANKING, DISCRETIONARY CONSUMPTION AND TEXTILES

SECTOR UNDERWEIGHTS: CAPEX, INDUSTRIALS, AND METALS

SECTOR NEUTRAL/EQUAL WEIGHTS: AUTO, AUTO ANC, IT AND CEMENT

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