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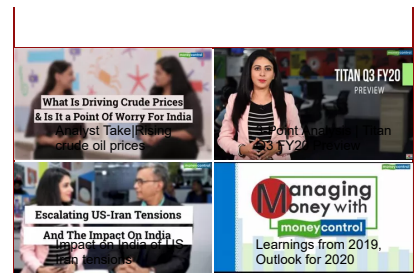
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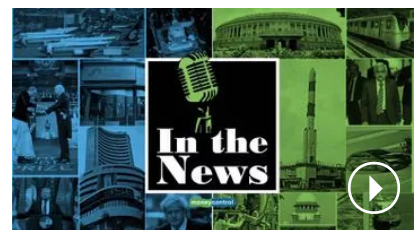
# Crude on the boil: 2 stocks to benefit, 5 names that may take a hit

Stocks that are likely to get impacted the most include names like Maruti Suzuki India, Bajaj Auto, HPCL, IOC, and Asian Paints, etc. may see a negative impact in the near term.

Kshitij Anand (<https://www.moneycontrol.com/author/kshitij-anand-6879>)  
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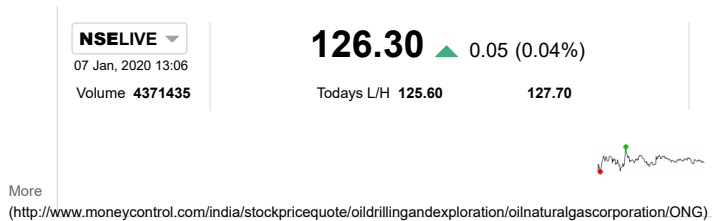


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airport which triggered risk-off sentiment in markets and pushed oil prices on the upside.



Experts are of the view

that crude oil prices are likely to remain at elevated levels in the next few weeks and we could see Brent Crude surpassing \$70/bbl in the short term that would result in high inflation in oil-importing countries like India.

“After easing of tension between the US and China, and output cuts undertaken by OPEC and its allies, crude oil prices were already rallying,” CARE Ratings said in a report.

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“Now coupled with the US airstrike, price of Brent has the potential to increase and cross the \$70/bbl mark in the coming few days, depending on the retaliation planned by the Iran government and the longevity of the feud is continued by both the countries,” it said.

Any increase in the price of crude oil is always going to be a cause of concern for India considering it imports more than 80 percent of oil requirements.

According to the CARE Rating report, in the current financial year, India has imported 4.5 mb/d (April-November) of crude oil and the import dependency based on consumption which has increased to 84.5 percent compared with it being 83.3 percent a year ago in the same period.

Jateen Trivedi, Senior Research Analyst (Commodity & Currency) at LKP Securities said that the recent tensions between the US and Iraq escalating strongly due to US

airstrike killed key Iranian and Iraqi military personnel, raising concerns that escalating Middle East tensions may disrupt oil supplies.

Trivedi is of the view that Brent Crude can rally over \$70/bbl and domestic MCX can touch 4,700 in this cross border tension.



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Increase in crude oil is likely to impact current account deficit as well as the fiscal deficit, inflation trends, and could possibly increase the production cost of companies that use crude oil as raw material cost.

“OMCs (oil marketing companies), tyre and paint stocks will be impacted most with higher crude prices and may see correction,” Gaurav Garg, Head of Research at CapitalVia Global Research Limited- Investment Advisor told Moneycontrol.

**We spoke to various experts and collated a list of stocks that are likely to get impacted the most from a rise in crude oil:**

**Expert: Rajesh Palviya, Technical and Derivative Research Head, Axis Securities**

Oil Exploration companies like **ONGC**

(<https://www.moneycontrol.com/india/stockpricequote/oil-drilling-and-exploration/oilnaturalgascorporation/ONG>), **OIL India**

(<https://www.moneycontrol.com/india/stockpricequote/oil-drilling-and-exploration/oilindia/OI13>) would benefit from any rise in crude prices. Other sectors that use crude oil as a raw material would have a negative impact on this surge in crude prices namely automobiles, OMCs, paints, plastics and packaging material.

Stocks that are likely to get impacted the most include **Maruti Suzuki India**

(<https://www.moneycontrol.com/india/stockpricequote/auto-cars-jeeps/marutisuzukiindia/MS24>), **Bajaj Auto**

(<https://www.moneycontrol.com/india/stockpricequote/auto-2-3-wheelers/bajajauto/BA10>), **HPCL**

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(<https://www.moneycontrol.com/india/stockpricequote/refineries/indianoilcorporation/IOC>),

and **Asian Paints** (<https://www.moneycontrol.com/india/stockpricequote/paints-varnishes/asianpaints/AP31>).

**Expert: Amit Gupta, Co-Founder, TradingBells.**

ONGC, OIL India and oil exploration companies might get benefit from a rise in Crude oil prices whereas IT and Pharma companies may outperform if rupee sees further weakness.

Generally, OMCs, paints, aviation and financial stocks remain under pressure due to a surge in crude oil prices.

**Expert: Umesh Mehta, Head of Research, Samco Securities.**

ONGC and Oil India are likely to benefit the most from a rise in crude prices. Higher crude prices will entail higher price realizations for these players.

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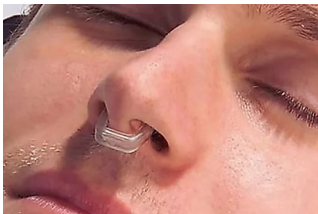
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