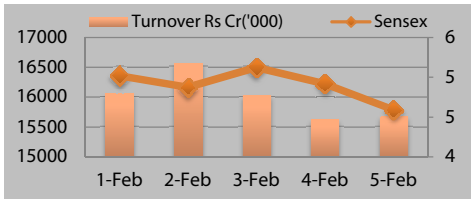


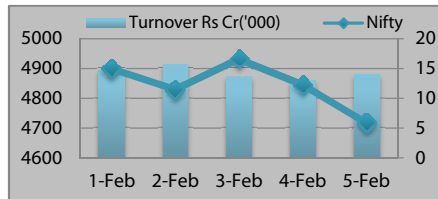
Weekly Newsletter



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Open	16,339
High	16,552
Low	15,725
Close	15,790
Change	(568)
Vol (Lacs)	19,756
Turn (Rs Cr)	23,710



Open	4,882
High	4,951
Low	4,692
Close	4,718
Change	(164)
Vol (Lacs)	36,427
Turn (Rs Cr)	71,260

MARKET UPDATE

INDIA

The Indian equity markets ended the week on a lower note. The BSE Sensex ended the week 3.47 percent lower at 15,790. The NSE Nifty also ended 3.35 percent lower at 4,718. The BSE Midcap was down by 2.50 percent and BSE Smallcap was down by 1.93 percent. All sectoral indices closed in red except Consumer Durables

The index was mainly down because of global cues and greater than expected CRR hike in the monetary policy.

GLOBAL MARKETS

US & Global indices ended on a negative note this week on concerns on account poor economic data and European sovereign debt issues

The Dow Jones lost 0.55 percent to end at 10,012 the S&P 500 index closed 0.73 percent lower at 1,066 while the Nasdaq closed 0.30 percent lower at 2,141 this week.

INDIAN MARKET

	5-Feb	29-Jan	% Change
BSE Sensex	15,790	16,358	(3.47)
S&P CNX Nifty	4,718	4,882	(3.36)
BSE Midcap	6,347	6,510	(2.50)
BSE Smallcap	8,074	8,233	(1.93)
CNX Nifty Junior	9,829	9,986	(1.57)
CNX Midcap	7,058	7,202	(2.00)

GLOBAL MARKETS

	5-Feb	29-Jan	% Change
Dow Jones Ind (USA)	10,012	10,067	(0.55)
Nasdaq Composite (USA)	2,141	2,147	(0.30)
S&P 500 (USA)	1,066	1,074	(0.73)
FTSE 100 (UK)	5,060	5,189	(2.48)
DAX (Germany)	5,434	5,609	(3.12)
Nikkei 225 (Tokyo)	10,057	10,198	(1.38)
Hang Seng (Hong Kong)	19,665	20,122	(2.27)
Shanghai Comp (China)	2,939	2,989	(1.68)
KOSPI (South Korea)	1,567	1,602	(2.21)
STI (Singapore)	2,683	2,745	(2.27)
MSCI Emerging Market	333	347	(4.06)
MSCI Frontier Market	499	493	1.13

DAILY COMMENTARY

Monday

The indices closed flat & was in line with its Asian peers, the Sensex was down nearly 200 points in opening trades. But a recovery in the Japanese markets engineered a turnaround on Dalal Street. The Sensex finally ended at 16,356, lower by one point, and the Nifty closed at 4,906, up 24 points.

Tuesday

The markets flattered to deceive on Tuesday. The Sensex had surged at opening bell, touching an intra-day high of 16525, as the latest data showed a jump in manufacturing activity in the US and across Asia. The Sensex closed at 16,163, weaker by 192 points, and the Nifty ended at 4830, down 70 points.

Wednesday

The bulls came out with all guns blazing on Wednesday. After being at the receiving end of the stick in the recent past, the blue chips propelled the Sensex within kissing distance of the 16500 mark. The Sensex finally ended at 16,496, stronger by 332 points, and the Nifty closed at 4930, up 100 points

Thursday

The Sensex on Thursday shed 1.64 per cent, or 271.10 points, to close at 16,224, the broader Nifty was down 1.75 per cent, or 86 points, at 4,845

Friday

The Sensex followed the global cues and finally settled at 15790 down 439 points and NSE Nifty settled at 4718 down 126.7 points

CURRENCY

	5-Feb	29-Jan	% Change
INR / USD	46.78	46.18	1.30
USD / Euro	1.37	1.39	(1.60)
Yen / USD	89.25	90.30	(1.16)

BOND MARKETS

	5-Feb	29-Jan	Change
10yr G-Sec Yield	7.67	7.56	0.11
1yr G-Sec Yield	5.16	4.67	0.49
LIBOR (6m)	0.39	0.38	0.01
LIBOR (1m)	0.22	0.23	(0.01)
Inter-bank Call Rate	3.2	3.2	0.01

VALUATIONS

	P/E	P/B	DIV YLD
BSE	19.6	3.6	1.2
NSE	20.2	3.3	1.1
BSE500 Mcap/GDP Ratio	0.66		

SECTOR

	5-Feb	29-Jan	% Change
Consumer Durables	3,909	3,799	2.9
HealthCare	4,735	4,765	(0.6)
FMCG	2,699	2,725	(1.0)
Auto	6,801	6,953	(2.2)
Capital Goods	12,796	13,125	(2.5)
Tech	3,046	3,152	(3.4)
Oil&Gas	9,579	9,939	(3.6)
IT	4,796	4,978	(3.6)
Metal	15,362	15,962	(3.8)
Power	2,945	3,062	(3.8)
PSU	9,109	9,474	(3.9)
Bankex	9,217	9,654	(4.5)
Realty	3,250	3,500	(7.1)

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Weekly Newsletter



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Light Sweet Crude Oil lost 0.6 percent this week closing at \$71.2 from \$71.6 per barrel last week. Gold closed 1.4 percent lower at Rs 16,005 while Silver closed 7.9 percent lower at Rs 24,110 in the Indian market respectively.

COMMODITY	5-Feb	29-Jan	Change	% Change
Crude Oil (USD/bbl)	71.2	71.6	(0.4)	(0.6)
Gold (Rs/10 gm)	16,055.0	16,285.0	(230)	(1.4)
Silver (Rs/kg)	24,110.0	26,180.0	(2070)	(7.9)

SECTORAL ANALYSIS

Sectoral Performance Analysis

BSE Power

The BSE Consumer Durables Index gained 2.6 percent for the week. Top gainer in this index was Titan Industries gaining 12.48 percent followed by Rajesh Exports aging 7.5 percent for the week. Some losers in this index were Gitanjali Gems, Videocon, Blue Star losing in range of 3- 6 percent each.

TOP PERFORMING SECTORS

BSE Consumer Durables Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Titan Industries	1685.85	1498.8	12.48	4,582
Rajesh Exports	103.75	96.55	7.46	141,612
Gitanjali Gems	110.75	114.45	(3.2)	59,650
Blue Star	355.4	376.8	(5.7)	27,184
Videocon	211.75	225.75	(6.2)	118,954

BSE Healthcare

The BSE Healthcare Index was down by 0.6 percent this week. Top gainers in this index was Lupin gaining 8.10 percent followed by Bilcare Pharma gaining 6.95 percent. Some other gainers in this index was Dr Reddy, Glenmark Pharma gaining in range of 2-4 percent.

BSE Healthcare Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Lupin	1535.3	1420.25	8.10	26,096
Bilcare	500.3	467.8	6.95	25,119
IPCA Labs	1170.45	1124.05	4.13	2,184
Glenmark	250.25	242.15	3.3	116,494
Aurobindo Pharma	869.1	845.65	2.8	8,766
Glaxosmithline Pharma	1553.1	1520.15	2.2	5,953
Dr Reddy	1149.3	1125.25	2.1	16,883

BSE FMCG

The BSE FMCG index was down 1 percent this week. Frontline gainers United Breweries gaining 21.6% followed by Dabur, Godrej Consumer, Britannia gaining in range of 3-6 percent each.

BSE FMCG Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
United Breweries	179.8	147.75	21.69	17,568
Godrej Conumer	249.1	235.1	5.95	18,087
Dabur	169.2	159.85	5.85	30,481
Britannia	1615.45	1567.85	3.04	2,458
Colgate Palmolive	694.3	678.55	2.32	19,561

BSE Auto

The BSE Auto index was down by 2.2 percent. Some gainers in this index Cummins India gaining 4.46 percent at close followed by Hero Honda gaining 1.76 percent. Some other marginal gainers were Amtek Auto and Ashok Leyland gaining 0.66 and 0.4 percent.

BSE Auto Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Cummins	468.7	448.7	4.46	19,587
Hero Honda	1586.15	1558.7	1.76	61,625
Amtek Auto	171.17	170.05	0.66	223,672
Ashok Leyland	50.25	50.05	0.40	160,399
Bosch	4636	4644	(0.17)	1,194

BSE Capital Goods

The BSE Capital Goods index was down by 2.5 percent. Some gainers Kalpataru Power aging 2.85 percent followed by BEML gaining a 0.30 up move. Some stocks that closed in red were L&T, Elecon Engineering losing in range of 0-1.5 percent.

BSE Capital Goods Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Kalpataru Power	1071.95	1042.25	2.85	2,320
BEML	1070.45	1067.3	0.30	4,874
Bharat Electronics	1948.25	1947.75	0.03	14,740
L&T	1423.15	1425	(0.13)	230,949
Elecon Engineering	81.25	82.25	(1.22)	91,978

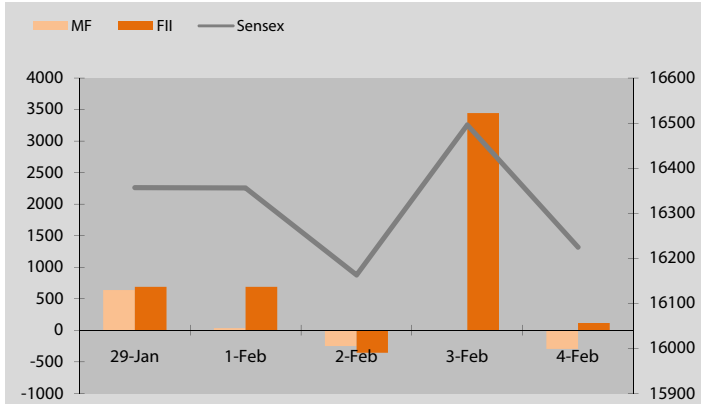
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Weekly Newsletter

Fullerton
Securities

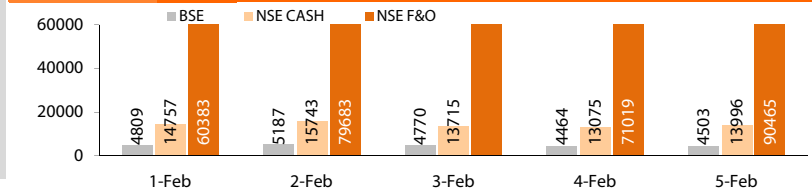
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FII / MF ACTIVITY (Rs. Cr)



	29-Jan	1-Feb	2-Feb	3-Feb	4-Feb
FII Cash Net	198	-49	11	486	-43
FII Index Futures	-430	544	-388	2447	-197
FII Index Options	1029	48	-328	9	704
FII Stock Futures	-119	24	239	452	-342
FII Stock Options	10	122	111	47	-8
FII Net	687	688	-355	3440	115
Open Interest	94753	98226	103929	106669	108754
Mutual Fund	636	33	-247	6	-296

TURNOVER (Rs. Cr)



MOVERS & SHAKERS

TOP 5 FRONTLINE GAINERS

Name	Rs	% ▲
Hero Honda Motor	1586.2	1.8%
H D F C	2390.3	0.3%
Sun Pharma.	1474.1	0.3%
Reliance Infra.	1034.6	0.1%
Larsen & Toubro	1423.2	-0.1%

TOP 5 MIDCAP GAINERS

Name	Rs	% ▲
United Breweries	179.8	21.7%
P&G	1861.2	16.7%
KGN Industries	308.9	14.9%
Titan Industries	1686.0	12.5%
Prakash Industries	210.4	11.0%

TOP 5 SMALLCAP GAINERS

Name	Rs	% ▲
Jindal Worldwide	211.3	26.6%
Kanani Industries	249.0	24.7%
PVP Ventures	25.9	19.6%
KRBL	231.6	19.4%
Falcon tyres	179.9	18.3%

TOP 5 FRONTLINE LOSERS

Name	Rs	% ▼
JP Associates	125.3	-9.0%
SBI	1896.7	-7.8%
DLF	309.5	-7.0%
RIL	981.3	-6.2%
Hindalco	138.1	-6.2%

TOP 5 MIDCAP LOSERS

Name	Rs	% ▼
Simplex Infrastructure	419.4	17.9%
Jai Corp	259.4	13.6%
Andrew Yules	58.9	13.4%
Bajaj Hindusthan	176.1	13.0%
Karnataka Bank	116.0	11.4%

TOP 5 SMALLCAP LOSERS

Name	Rs	% ▼
Shree Ashtavinayak	27.5	66.0%
Vipul Ltd	45.4	20.1%
Sakthi Sugars	69.5	14.8%
Sanwaria Agro mills	30.9	14.4%
HBL Power	32.1	13.8%

INSIDER UPDATES

Company	Name	Acquirer Designation	Transaction Date	BUY/SELL	No. of Shares Transacted	Holding after Transaction %
					Quantity	
Gwalior Chemical Industries Ltd	Aroni Commercials Ltd	Strategic Investor	15/01/2010	BUY	2296800	11.63
Gwalior Chemical Industries Ltd	Rohit Kothari	Managing Director	15/01/2010	BUY	200000	1.4
Envair Electrodyne Ltd	Shripad Mirashi	Chairman & MD	14/01/2010	BUY	1200	52.24
Zandu Pharmaceutical Works Ltd	Emami Infrastructure Ltd	Strategic Investor	24/12/2009	SELL	120134	-
Power Finance Corporation Ltd	P Malik	Investor	12/01/10	SELL	2540	-
Financial Technologies (India) Ltd	Mahesh R Joshi	Strategic Investor	11/01/10	SELL	500	-
JRG Securities Ltd	Regi Jacob	Director	08/01/10	SELL	46500	7.02
Gee Kay Finance & Leasing Com	C R Rajesh Nair	Managing Director	07/01/10	SELL	2319	1.21
Zandu Pharmaceutical Works Ltd	Emami Infrastructure Ltd	Strategic Investor	23/12/2009	BUY	555636	0
Aventis Pharma Ltd	UTI Mutual Fund	Strategic Investor	11/12/09	SELL	820164	2.84
Baba Arts	Gordhan P Tanwani	Chairman	15/01/2010	SELL	284151	38.16
Selan Exploration Technology	Aroon Mahajan	Director	15/01/2010	SELL	250000	-
Selan Exploration Technology	Winton Roavic Pvt Ltd	Strategic Investor	15/01/2010	SELL	350000	-
Everest Industries	M L Gupta	Managing Director	14/01/2010	SELL	30000	0.17
Jaiprakash Power Ventures	Jaiprakash Associates Ltd	Strategic Investor	13/01/2010	BUY	1287000000	76.25
Jaiprakash Power Ventures	Jaypee Ventures Pvt Ltd	Strategic Investor	13/01/2010	BUY	240000000	11.45
Oracle Financial Services	V Shankar	Executive VP	13/01/2010	SELL	1020	-
Ramsarup Industries	Ashish Jhunjhunwala	Chairman & MD	13/01/2010	SELL	300000	11.85
Shree Ashtavinayak Cine Vision	Dahlia Traders Pvt Ltd	Strategic Investor	13/01/2010	SELL	120000	20.8
Shree Ashtavinayak Cine Vision	Dhilian Mehta	Promoter	13/01/2010	BUY	112000	-

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