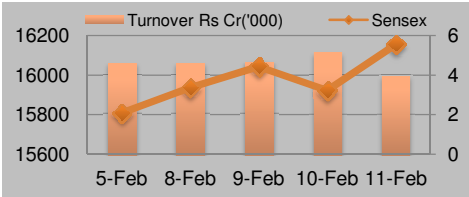


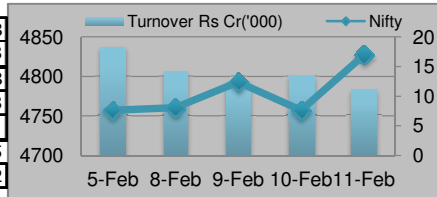
# Weekly Newsletter



Volume: 1 | Issue: 46 | Feb 13, 2010



Open	15,808
High	16,153
Low	15,808
Close	16,153
Change	363
Vol (Lacs)	18325
Turn (Rs Cr)	22,792



Open	4,757
High	4,827
Low	4,757
Close	4,827
Change	109
Vol (Lacs)	33282
Turn (Rs Cr)	65,479

## MARKET UPDATE

### INDIA

The Indian equity markets ended the week on a higher note. The BSE Sensex ended the week 2.30 percent higher at 16,153. The NSE Nifty also ended 2.31 percent higher at 4,827. The BSE Midcap was up by 2.56 percent and BSE Smallcap was up by 2.84 percent.

The top performing sector of the week were IT, Tech and Consumer Durables followed by Realty, Capital Goods and Power.

### GLOBAL MARKETS

US & Global indices ended marginally higher as concerns on European debt troubles and an unexpected move by China to raise the bank's reserve requirements led the markets ignore the robust retail sales data.

The Dow Jones gained 0.87 percent to end at 10,099 the S&P 500 index closed 0.89 percent higher at 1,076 while the Nasdaq closed 1.99 percent higher at 2,184 this week.

## INDIAN MARKET

	11-Feb	5-Feb	% Change
BSE Sensex	16,153	15,790	2.30
S&P CNX Nifty	4,827	4,718	2.31
BSE Midcap	6,510	6,347	2.56
BSE Smallcap	8,303	8,074	2.84
CNX Nifty Junior	10,062	9,829	2.37
CNX Midcap	7,278	7,058	3.11

## GLOBAL MARKETS

	12-Feb	5-Feb	% Change
Dow Jones Ind (USA)	10,099	10,012	0.87
Nasdaq Composite (USA)	2,184	2,141	1.99
S&P 500 (USA)	1,076	1,066	0.89
FTSE 100 (UK)	5,142	5,060	1.63
DAX (Germany)	5,500	5,434	1.22
Nikkei 225 (Tokyo)	10,092	10,057	0.35
Hang Seng (Hong Kong)	20,269	19,665	3.07
Shanghai Comp (China)	2,985	2,939	1.58
KOSPI (South Korea)	1,598	1,567	1.97
STI (Singapore)	2,759	2,683	2.83
MSCI Emerging Market	343	333	2.98
MSCI Frontier Market	511	499	2.47

## DAILY COMMENTARY

### Monday

A strong opening in European markets buoyed the index over the 16,000 mark in late noon trades on Monday. The Sensex, however, started dropping once again and ended flat at 15,936. The Nifty after moving between 4,675 and 4,799 ended almost unchanged at 4,760.

### Tuesday

After a weak opening on mixed global cues, the Sensex dropped to a low of 15,863 on Tuesday. The Sensex ended at 16,042 - up 107 points, closing over 16,000 after three days. The NSE Nifty ended up 32 points at 4,793

### Wednesday

Markets had a positive start following global cues on Wednesday. The Sensex dropped to a low of 15,892 - down 249 points from the high. The Sensex ended with a loss of 120 points at 15,922. The Nifty ended down 35 points at 4,757.

### Thursday

The benchmark index, the Sensex, touched a high of 16,203 in intraday deals before settling at 16,153 levels - up 230 points (1.5%) from its previous close. In broader markets, the Nifty too gained 1.5% or 70 points to end the session at 4,826 levels.

### Friday

Indian markets were closed on Friday on account of 'Shivratri'

## CURRENCY

	11-Feb	5-Feb	% Change
INR / USD	46.50	46.78	(0.60)
USD / Euro	1.37	1.37	0.16
Yen / USD	89.70	89.25	0.50

## BOND MARKETS

	11-Feb	5-Feb	Change
10yr G-Sec Yield	7.84	7.67	0.17
1yr G-Sec Yield	4.87	5.16	(0.29)
LIBOR (6m)	0.39	0.39	0.01
LIBOR (1m)	0.23	0.22	0.01
Inter-bank Call Rate	3.2	3.2	0.00

## VALUATIONS

	P/E	P/B	DIV YLD
BSE	20.0	3.7	1.2
NSE	20.4	3.4	1.0
BSE500 Mcap/GDP Ratio	0.68		

## SECTOR

	11-Feb	5-Feb	% Change
IT	4,961	4,796	3.4
Teck	3,150	3,046	3.4
Consumer Durables	3,994	3,910	2.1
Realty	3,319	3,250	2.1
PSU	9,255	9,109	1.6
Capital Goods	12,917	12,796	0.9
Power	2,969	2,945	0.8
Bankex	9,284	9,217	0.7
Healthcare	4,762	4,735	0.6
Oil & Gas	9,614	9,579	0.4
Auto	6,817	6,801	0.2
FMCG	2,704	2,699	0.2
Metal	15,391	15,362	0.2

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# Weekly Newsletter



Volume: 1 | Issue: 46 | Feb 13, 2010

Light Sweet Crude Oil ained 3.2 percent this week closing at \$73.5 from \$71.2 per barrel last week. Gold closed 1.5 percent higher at Rs 16,290 while Silver closed 4.0 percent higher at Rs 25,080 in the Indian market respectively.

COMMODITY	11-Feb	5-Feb	Change	% Change
Crude Oil (USD/bbl)	73.5	71.2	2.3	3.2
Gold (Rs/10 gm)	16,290.0	16,055.0	235	1.5
Silver (Rs/kg)	25,080.0	24,110.0	970	4.0

## SECTORAL ANALYSIS

### Sectoral Performance Analysis

#### BSE IT

The BSE IT Index gained 3.4 percent for the week. Top gainer in this index was Financial Tech. gaining 8.6 percent followed by Infosys Tech. gaining 6.2 percent for the week. HCL Tech., Mphasis and Aptech gained in the range of 3 - 4.5 percent

### TOP PERFORMING SECTORS

BSE IT	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Financial Tech.	1520.7	1399.9	8.6	15,546
Infosys Tech.	2497.7	2352.2	6.2	41,009
Aptech	168.7	161.25	4.6	56,158
Mphasis	729.15	701.25	4.0	26,240
HCL Technologies	348.5	336.25	3.6	17,417

#### BSE Tech

The BSE Tech. Index gained 3.4 percent this week. Top gainers in this index was Financial Technologies gaining 8.6 percent followed by DC Holdongs gaining 7.5 percent. Some other gainers in this index were Dish TV, Bharti Airtel and Aptech gaining in the range of 4.5 - 5.5cent.

BSE Tech	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Financial Tech.	1520.7	1399.9	8.6	15,546
D C Holdings	151.8	141.2	7.5	39,829
Infosys Tech.	2497.7	2352.2	6.2	41,009
Dish TV	41.6	39.4	5.6	195,449
NDTV	130.6	124.35	5.0	10,799
Bharti Airtel	314.4	300.3	4.7	351,154
Aptech	168.7	161.25	4.6	56,158

#### BSE Consumer Durables

The BSE FMCG index was up 2.1 percent this week . Frontline gainers were Gitangali Gems gaining 6.3 percent followed by Blue Star, Titan Inds. and Videocon Inds. gaining upto 2.7 percent

BSE Consumer Durables	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Gitangali Gems	117.75	110.75	6.3	56,898
Blue Star	364.85	355.4	2.7	15,827
Titan Inds.	1701.2	1685.95	0.9	10,141
Videocon Inds.	213.6	211.75	0.9	100,868
Rajesh Exports	101.95	103.75	(1.7)	216,404

#### BSE Realty

The BSE Realty index was up by 2.1 percent. Some gainers in this index were Anant Raj Inds. gaining 5.5 percent followed by Omaxe, Indiabulls Realstate and Ansal properties gaining in the range of 2.5 - 3.5 percent.

BSE Realty	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Anant Raj Inds	130.35	123.55	5.5	100,543
Omaxe	93.95	90.9	3.4	26,797
Indbull.RealEst.	167.65	162.3	3.3	498,081
Unitech	71.05	69.05	2.9	2,307,313
Ansal Properties	68.15	66.5	2.5	86,791

#### BSE Capital Goods

The BSE Capital Goods index was up by 0.9 percent. Some gainers in this index were AIA Engg. gaining 5.6 percent followed by Walchan. Inds., Jyotp Structures, Rel. Indl. Infra and Lak. Mach. Works gaining in range of 3.5 - 5 percent.

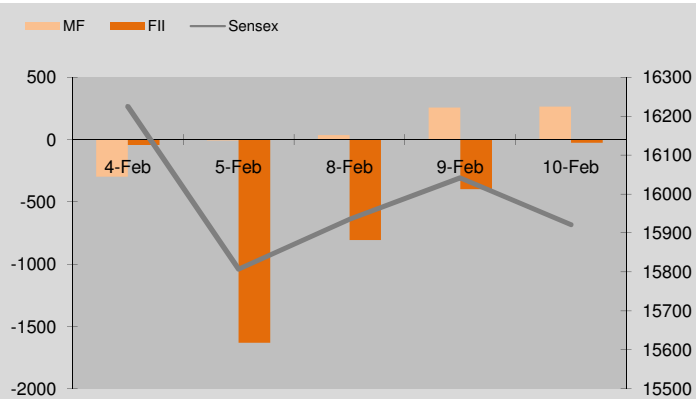
BSE Capital Goods	Price		% Return	Average Volume
	This Wk	Prev. Wk		
AIA Engg.	347.25	328.75	5.6	2,739
Walchan. Inds.	249.8	237.4	5.2	92,406
Jyoti Structures	167.1	159.45	4.8	70,675
Rel. Indl. Infra	857.85	825	4.0	18,139
Lak. Mach. Works	1904.85	1836.35	3.7	1,582

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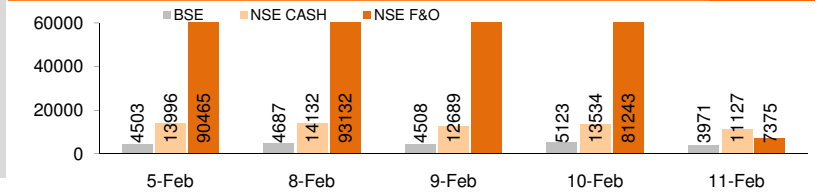
Volume: 1 | Issue: 46 | Feb 13, 2010

## FII / MF ACTIVITY (Rs. Cr)



	4-Feb	5-Feb	8-Feb	9-Feb	10-Feb
FII Cash Net	-43	-1630	-807	-396	-24
FII Index Futures	-197	-1929	-296	1135	880
FII Index Options	704	622	711	-239	-142
FII Stock Futures	-342	178	-5	116	307
FII Stock Options	-8	24	-5	9	-2
<b>FII Net</b>	<b>115</b>	<b>-2734</b>	<b>-401</b>	<b>625</b>	<b>1018</b>
Open Interest	108754	111226	114210	114737	116986
Mutual Fund	-296	-7	37	259	267

## TURNOVER (Rs. Cr)



## MOVERS & SHAKERS

TOP 5 FRONTLINE GAINERS			TOP 5 MIDCAP GAINERS			TOP 5 SMALLCAP GAINERS		
Name	Rs	% ▲	Name	Rs	% ▲	Name	Rs	% ▲
Hero Honda Motor	1690.2	6.6%	HMT	99.5	24.5%	Goodyear India	267.0	45.1%
Infosys Tech.	2497.7	6.2%	Texmaco	162.6	16.2%	KRBL	29.7	28.2%
JP Associates	132.7	5.9%	SPARC	85.6	13.8%	VIP Inds.	228.0	23.1%
Grasim Inds	2711.2	5.4%	Hind.Oil Explor.	270.3	13.7%	Gemini Comm.	47.8	22.0%
ACC	886.0	5.0%	Gillette India	1433.8	11.0%	Titagarh Wagons	463.5	20.5%

TOP 5 FRONTLINE LOSERS			TOP 5 MIDCAP LOSERS			TOP 5 SMALLCAP LOSERS		
Name	Rs	% ▼	Name	Rs	% ▼	Name	Rs	% ▼
Tata Steel	534.0	-3.0%	Prakash Inds.	197.5	-6.1%	Sh.Ashtavinayak	20.0	-27.3%
Tata Power Co.	1265.0	-1.6%	Torrent Pharma.	448.3	-5.1%	OCL Iron & Steel	22.4	-19.3%
NTPC	202.6	-0.8%	Guj NRE Coke	69.6	-4.7%	Mah. Polybutenes	131.1	-15.6%
DLF	307.0	-0.8%	Info Edg.(India)	859.2	-3.7%	Richa Industries	41.3	-11.5%
Maruti Suzuki	1355.2	-0.3%	K E C Intl.	574.2	-3.5%	Swaraj Mazda	246.0	-9.3%

## INSIDER UPDATES

Company	Name	Acquirer Designation	Transaction Date	BUY/SELL	No. of Shares Transacted	Quantity	Holding after Transaction %
Landmarc Leisure Corporation	L Yashaswini Leisure Pvt Ltd	Strategic Investor	25/01/2010	BUY	8641	6.68	
Sujana Metal Products Ltd	Foster Infin & Trading Pvt Ltd	Strategic Investor	25/01/2010	BUY	5000000	3.2	
Sujana Metal Products Ltd	Yalamanchili Finance & Trading P L	Strategic Investor	25/01/2010	BUY	5000000	13.09	
Jaiprakash Associates Ltd	Rekha Dixit	Investor	22/12/2009	BUY	3900	0	
Jaiprakash Associates Ltd	Shiva Dixit	Investor	22/12/2009	BUY	39982	0	
Landmarc Leisure Corporation	L Yashaswini Leisure Pvt Ltd	Strategic Investor	22/01/2010	BUY	8500	6.68	
Linkson International Ltd	Akashdeep Commercial Pvt Ltd	Strategic Investor	22/01/2010	BUY	178770	12.25	
Linkson International Ltd	Dannon Constructions Pvt Ltd	Strategic Investor	22/01/2010	BUY	178770	12.25	
Linkson International Ltd	Mangalgouri Marketing Pvt Ltd	Strategic Investor	22/01/2010	BUY	178770	12.25	
Linkson International Ltd	Ranbhumi Merchandise Pvt Ltd	Strategic Investor	22/01/2010	BUY	178770	12.25	
Mahindra & Mahindra Financial	! Anjanikumar Choudhari	President	22/01/2010	BUY	2735	0.01	
Mahindra & Mahindra Financial	! Bharat N Doshi	Executice Director	22/01/2010	BUY	27952	0.13	
Mahindra & Mahindra Financial	! Dr. Pawan Kumar Goenka	Non-Executive Director	22/01/2010	BUY	2735	0	
Mahindra & Mahindra Financial	! Manohar Gopal Bhide	Chariman & Managing Dire	22/01/2010	BUY	1000	0	
Mahindra & Mahindra Financial	! Uday Y Phadke	Director	22/01/2010	BUY	6929	0.01	
Landmarc Leisure Corporation	L Yashaswini Leisure Pvt Ltd	Strategic Investor	21/01/2010	BUY	14000	6.68	
Financial Technologies (India) Lt	Arshad Khan	Director	20/01/2010	SELL	2000	0	
Glenmark Pharmaceuticals Ltd	Glenn Saldanha	Managing Director & Chief	20/01/2010	BUY	4000	0.25	
T T Ltd	Sanjay Kumar Jain	Joint Managing Director	20/01/2010	BUY	46657	2.01	
Gammon India Ltd	Reliance Tax Saver (Elss)	Strategic Investor	19/01/2010	BUY	1000000	5.06	

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