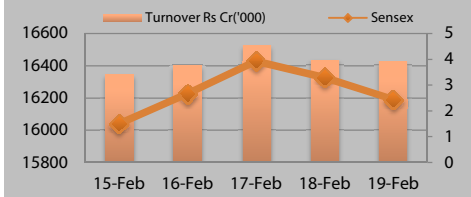


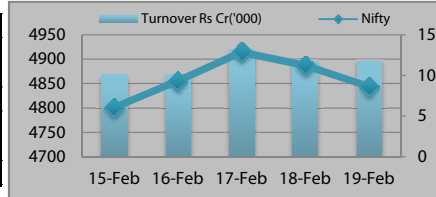
Weekly Newsletter



Volume: 1 | Issue: 47 | Feb 20, 2010



Open	16,187
High	16,480
Low	16,011
Close	16,191
Change	38
Vol (Lacs)	16,558
Turn (Rs Cr)	19,570



Open	4,828
High	4,930
Low	4,784
Close	4,845
Change	18
Vol (Lacs)	28,754
Turn (Rs Cr)	57,220

MARKET UPDATE

INDIA

The Indian equity markets ended the week on a higher note. The BSE Sensex ended the week 0.24 percent higher at 16,191. The NSE Nifty also ended 0.37 percent higher at 4,845. The BSE Midcap was down by 1.20 percent and BSE Smallcap was down by 1.19 percent.

The top performing sector for the week was Banking followed by Metal and Auto. The laggard for the week was Realty and Power

GLOBAL MARKETS

US & Global indices ended on a positive note this week on the back positive economic data and Fed increasing the discount rate by 50 bps.

The Dow Jones gained 3 percent to end at 10,402 the S&P 500 index closed 3.07 percent higher at 1,109 while the Nasdaq closed 2.70 percent higher at 2,243 this week.

INDIAN MARKET

	19-Feb	11-Feb	% Change
BSE Sensex	16,191	16,153	0.24
S&P CNX Nifty	4,845	4,827	0.37
BSE Midcap	6,432	6,510	(1.20)
BSE Smallcap	8,204	8,303	(1.19)
CNX Nifty Junior	10,014	10,062	(0.48)
CNX Midcap	7,212	7,278	(0.90)

GLOBAL MARKETS

	19-Feb	12-Feb	% Change
Dow Jones Ind (USA)	10,402	10,099	3.00
Nasdaq Composite (USA)	2,243	2,184	2.70
S&P 500 (USA)	1,109	1,076	3.07
FTSE 100 (UK)	5,358	5,142	4.20
DAX (Germany)	5,722	5,500	4.04
Nikkei 225 (Tokyo)	10,124	10,092	0.31
Hang Seng (Hong Kong)	19,894	20,269	(1.85)
Shanghai Comp (China)	3,018	2,985	1.11
KOSPI (South Korea)	1,593	1,598	(0.31)
STI (Singapore)	2,747	2,759	(0.43)
MSCI Emerging Market	347	343	1.17
MSCI Frontier Market	523	511	2.35

CURRENCY

	19-Feb	11-Feb	% Change
INR / USD	46.32	46.50	(0.39)
USD / Euro	1.36	1.37	(0.73)
Yen / USD	91.52	89.70	2.03

BOND MARKETS

	19-Feb	11-Feb	Change
10yr G-Sec Yield	7.87	7.84	0.03
1yr G-Sec Yield	5.33	4.87	0.46
LIBOR (6m)	0.39	0.39	0.00
LIBOR (1m)	0.23	0.23	(0.00)
Inter-bank Call Rate	3.3	3.2	0.10

VALUATIONS

	P/E	P/B	DIV YLD
BSE	19.9	3.6	1.2
NSE	20.7	3.4	1.0
BSE500 Mcap/GDP Ratio	0.67		

SECTOR

	19-Feb	11-Feb	% Change
Bankex	9560	9284	3.0
Metal	15806	15391	2.7
Auto	6998	6817	2.7
IT	5081	4961	2.4
Consumer Durables	4078	3994	2.1
Healthcare	4862	4762	2.1
FMCG	2753	2704	1.8
Capital Goods	13143	12917	1.7
Oil & Gas	9655	9614	0.4
Teck	3142	3150	(0.3)
Power	2960	2969	(0.3)
PSU	9222	9255	(0.4)
Realty	3189	3319	(3.9)

DAILY COMMENTARY

Monday

The Sensex opened at 16,187 (up 34 points), touched a high of 16,227, but soon slipped into red on Monday. It eventually ended with a loss of 114 points at 16,038. The NSE Nifty shed 25 points at 4,802.

Tuesday

The markets after a sedate start gained strength in the second half of Tuesday on the back of selective buying. The Sensex opened flat at 16,042, and touched a low of 16,021 in early trades. The index finally ended with a gain of 188 points (1.2%) at 16,227. The NSE Nifty settled 54 points higher at 4,856.

Wednesday

The Indian bourses started on a flat note on Wednesday at 16,229 but soon rallied tracking positive global cues. Buying in the metal sector helped the index soar to a high of 16,481, up 254 points from the previous close. The Sensex eventually ended firm at 16,429, up 203 points. The NSE Nifty shut shop at 4,914, up 58 points.

Thursday

The Indian bourses opened almost flat at 16,421 on Thursday. The Sensex finally ended with a loss of 101 points at 16,328. The NSE Nifty has closed at 4,888, down 28 points.

Friday

The Sensex opened lower at 16,256 owing to extremely weak Asian cues however it recovered and touched high of 16,302 but finally ended at 16,191 and Nifty closed at 4,845 down 43 points

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Weekly Newsletter



Volume: 1 | Issue: 47 | Feb 20, 2010

Light Sweet Crude Oil gained 8.6 percent this week closing at \$79.8 from \$73.5 per barrel last week. Gold closed 2.4 percent higher at Rs 16,680 while Silver closed 0.6 percent higher at Rs 24,935 in the Indian market respectively.

COMMODITY	19-Feb	11-Feb	Change	% Change
Crude Oil (USD/bbl)	79.8	73.5	6.3	8.6
Gold (Rs/10 gm)	16,680.0	16,290.0	390	2.4
Silver (Rs/kg)	24,935.0	25,080.0	(145)	(0.6)

SECTORAL ANALYSIS

Sectoral Performance Analysis

BSE Bankex

The BSE Bankex Index was the top gainer this week gaining 3 percent. Top gainer in this index was HDFC Bank gaining strong upmove of 6.50 percent followed by Axis Bank gaining 5.89 percent. Some other gainers in this index were BOB, PNB and Indusind Bank gaining in range of 1-4 percent.

TOP PERFORMING SECTORS

BSE Bankex	Price	Price	%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
HDFC Bank	1699.55	1595.75	6.50	38,081
Axis Bank	1096	1035	5.89	19,009
IndusInd Bank	155.2	149.45	3.85	65,374
Bank of Baroda	569.15	557.6	2.07	46,923
Punjab Natl.Bank	890.95	882.6	0.95	15,410

BSE Metal

The BSE Metal Index was up by 2.7 percent this week. Top gainers in this index were Gujarat NRE Coke gaining 9.20 percent at close. followed by Hindalco Industries gaining a strong 8.32 percent. Some other gainers were Tata Steel on back of good results, JSW steel, SAIL and NALCO gaining in range of 0.5-5 percent.

BSE Metal	Price	Price	%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
Guj NRE Coke	76	69.6	9.20	485,384
Hindalco Inds.	149.75	138.25	8.32	1,475,633
Tata Steel	562.55	534	5.35	555,850
JSW Steel	1020.45	986.2	3.47	77,207
S A I L	207.15	205.6	0.8	228,646
Natl. Aluminium	367.2	366.1	0.3	12,715
Hind.Zinc	1075.6	1072.9	0.3	10,567

BSE Auto

The BSE Auto index was up 2.7 percent this week. Frontline gainers were Apollo Tyres gaining 4.48 percent for the week followed by Cummins India gaining 2.7 percent. Some other gainers were Tata Motors, Bajaj Auto and M&M gaining in range of 1-1.5 percent each.

BSE Auto	Price	Price	%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
Apollo Tyres	58.35	55.85	4.48	290,020
Cummins India	472.15	459.75	2.70	5,475
Tata Motors	697.9	687.75	1.48	65,666
Bajaj Auto	1809.65	1787.85	1.22	6,836
M & M	998.9	987.25	1.18	42,592

BSE IT

The BSE IT index was up by 2.4 percent. Some gainers in this index were HCL Technologies gaining 3.77 percent followed by Patni Computers gaining 3.49 percent at close. Some other gainers for the week were Aptech, Wipro and Infosys gaining in range of 1-2.5 percent each.

BSE IT	Price	Price	%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
HCL Technologies	361.65	348.5	3.77	17,417
Patni Computer	475.65	459.6	3.49	30,921
Aptech	172.65	168.7	2.34	56,158
Wipro	666	655.55	1.59	24,348
Infosys Tech.	2529.55	2497.7	1.28	41,009

BSE Consumer Durables

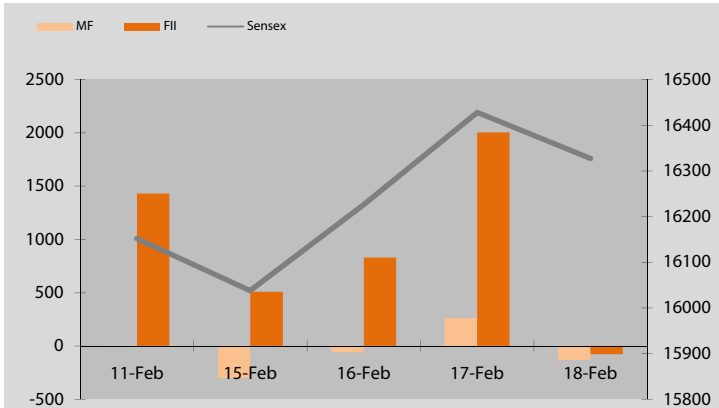
The BSE Realty index was up by 2.1 percent. Some gainers were Titan Industries gaining 4.26 percent and making its new 52 week high followed by Videocon Industries gaining 2.64 percent. Some stocks that closed in red were Rajesh Exports, Blue Star and Gitanjali Gems all losing in range of 1-5 percent.

BSE Consumer Durables	Price	Price	%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
Titan Inds.	1808.15	1734.3	4.26	5,156
Videocon Inds.	229	223.1	2.64	71,915
Gitanjali Gems	118.95	120.9	(1.61)	64,493
Blue Star	355	362.95	(2.19)	4,943
Rajesh Exports	99.95	104.95	(4.76)	139,782

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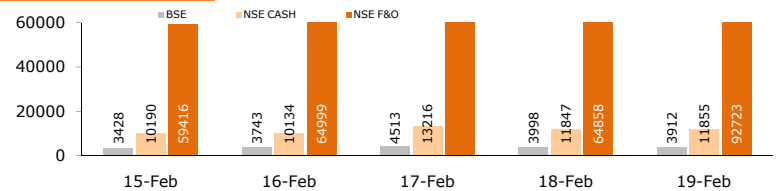
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FII / MF ACTIVITY (Rs. Cr)



	11-Feb	15-Feb	16-Feb	17-Feb	18-Feb
FII Cash Net	351	218	257	1224	-29
FII Index Futures	676	108	226	806	-349
FII Index Options	111	186	344	-284	167
FII Stock Futures	293	-1	7	263	134
FII Stock Options	-2	-1	-6	-7	2
FII Net	1429	509	829	2001	-76
Open Interest	117017	119802	120397	121753	122915
Mutual Fund	2	-299	-59	263	-132

TURNOVER (Rs. Cr)



MOVERS & SHAKERS

TOP 5 FRONTLINE GAINERS			TOP 5 MIDCAP GAINERS			TOP 5 SMALLCAP GAINERS		
Name	Rs	%▲	Name	Rs	%▲	Name	Rs	%▲
Hindalco Inds.	149.8	8.3%	Sunteck Realty	546.8	11.2%	AP Paper	119.2	24.6%
HDFC Bank	1699.6	6.5%	BOC India	218.7	10.9%	Amtek India	70.0	21.4%
Tata Steel	562.6	5.3%	3M India	2041.1	10.0%	Aditya Birla Mor	57.9	19.6%
H D F C	2487.7	4.3%	Guj NRE Coke	76.0	9.2%	OCL Iron & Steel	26.7	19.2%
Hind. Unilever	241.0	3.3%	Educomp Sol.	708.5	8.9%	Varun Inds.	168.0	18.6%
TOP 5 FRONTLINE LOSERS			TOP 5 MIDCAP LOSERS			TOP 5 SMALLCAP LOSERS		
Name	Rs	%▼	Name	Rs	%▼	Name	Rs	%▼
Bharti Airtel	278.3	-11.5%	Indbull.RealEst.	154.9	-12.9%	Thinksoft Globa	271.6	-47.2%
Reliance Infra.	1002.5	-5.7%	Andrew Yule & Co	52.6	-12.6%	Mediaone Glob:	69.1	-22.5%
DLF	291.3	-5.1%	Hind.Oil Explor.	247.1	-8.6%	Sh.Ashtavinayal	15.7	-21.8%
Rel. Comm.	161.8	-4.5%	Balrampur Chini	107.2	-8.4%	IndiaNivesh	482.0	-19.6%
Reliance Inds.	984.3	-2.9%	Mah. Seamless	339.2	-7.7%	KLG Systel	142.2	-17.2%

INSIDER UPDATES

Company	Name	Acquirer Designation	Transaction Date	BUY/SELL	No. of Shares Transacted	Holding after Transaction %
					Quantity	
Asian Oilfield Services Ltd	Samara Capital Partners Fund I Ltd	Strategic Investor	03/02/10	BUY	4050000	36.22
Bharati Shipyard Ltd	Credit Suisse (Singapore) Ltd	Strategic Investor	02/02/10	BUY	100000	8.82
Consolidated Construction Consor	R Sarabeswar	Chairman & CEO	04/02/10	BUY	5500	4.6
Lupin Ltd	Ashok Kumar Madan	Investor	01/02/10	SELL	900	0
Natco Pharma Ltd	V C Nannapaneni	Chairman & MD	04/02/2010	BUY	10500	28.21
Nava Bharat Ventures Ltd	T Chandrasekhar Rao	Investor	08/01/10	SELL	1000	0
Nucleus Software Exports Ltd	Ravi Pratap Singh	President	03/02/2010	SELL	19995	1.01
Priyadarshini Spinning Mills Ltd	Padmaja Kodali	Investor	03/02/10	SELL	22500	1.76
Quintegra Solutions Ltd	V Radhakrishnan	Investor	03/02/10	SELL	1291202	0
Shakti Press Ltd	Sri Krsna Cardboards P Ltd	Strategic Investors	02/02/10	SELL	200	0
Shri Bajrang Alloys Ltd	Anand Goel	MD	04/02/2010	BUY	3500	2.77
Sumedha Fiscal Services Ltd	Raj Kumar Lohia & PACs	Investor	02/02/10	BUY	56643	5.72
Landmarc Leisure Corporation Ltd	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 Ltd	Strategic Investor	25/01/2010	BUY	5000000	13.09
Jaiprakash Associates Ltd	Rekha Dixit	Investor	22/12/2009	BUY	3900	0.00
Jaiprakash Associates Ltd	Shiva Dixit	Investor	22/12/2009	BUY	39982	0.00
Landmarc Leisure Corporation Ltd	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
Financial Technologies (India) Ltd	Arshad Khan	Director	20/01/2010	SELL	2000	0

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