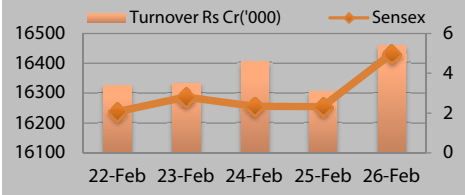


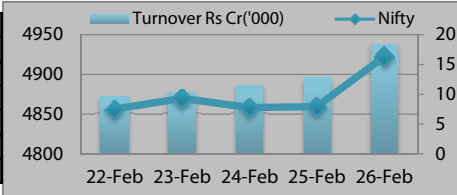
Weekly Newsletter



Volume: 1 | Issue: 48 | Feb 27, 2010



Open	16,191
High	16,669
Low	16,167
Close	16,430
Change	239
Vol (Lacs)	14,814
Turn (Rs Cr)	20,055



Open	4,849
High	4,992
Low	4,833
Close	4,922
Change	77
Vol (Lacs)	31,227
Turn (Rs Cr)	63,320

MARKET UPDATE

INDIA

The Indian equity markets ended the week on a higher note. The BSE Sensex ended the week 1.47 percent higher at 16,430. The NSE Nifty also ended 1.59 percent higher at 4,922. The BSE Midcap was down by 0.54 percent and BSE Smallcap was down by 1.67 percent.

The top performing sector for the week was Metal followed by Banking and Capital Goods. The laggard for the week was FMCG and Consumer durables.

GLOBAL MARKETS

US & Global indices ended on a negative note this week on the back poor economic data and Greece concern on its sovereign debt.

The Dow Jones lost 0.7 percent to end at 10,325 the S&P 500 index closed 0.21 percent lower at 1,104 while the Nasdaq closed 0.21 percent lower at 2,238 this week.

INDIAN MARKET

	26-Feb	19-Feb	% Change
BSE Sensex	16,430	16,191	1.47
S&P CNX Nifty	4,922	4,845	1.59
BSE Midcap	6,397	6,432	(0.54)
BSE Smallcap	8,067	8,204	(1.67)
CNX Nifty Junior	10,099	10,014	0.85
CNX Midcap	7,167	7,212	(0.62)

GLOBAL MARKETS

	26-Feb	19-Feb	% Change
Dow Jones Ind (USA)	10,325	10,402	(0.74)
Nasdaq Composite (USA)	2,238	2,243	(0.21)
S&P 500 (USA)	1,104	1,109	(0.41)
FTSE 100 (UK)	5,355	5,358	(0.06)
DAX (Germany)	5,598	5,722	(2.16)
Nikkei 225 (Tokyo)	10,126	10,124	0.02
Hang Seng (Hong Kong)	20,608	19,894	3.59
Shanghai Comp (China)	3,052	3,018	1.12
KOSPI (South Korea)	1,594	1,593	0.06
STI (Singapore)	2,750	2,747	0.11
MSCI Emerging Market	348	347	0.39
MSCI Frontier Market	519	523	(0.69)

DAILY COMMENTARY

Monday

The Sensex shed nearly 200 points from the day's high to close at 16237 on Monday, higher by 45 points and the Nifty ended at 4856, up 11 points.

Tuesday

The markets seemed to be in a consolidation mode throughout the day on Tuesday. The indices opened weak and recovered almost immediately. The Sensex finally ended at 16286, stronger by 49 points and the Nifty closed at 4875, up 19 points.

Wednesday

The market activity was almost a mirror image of the previous day on Wednesday. The Sensex was stuck in a tight range of around 150 points before ending at 16255, down 30 points and the Nifty closed at 4859, weaker by eleven points

Thursday

The markets chose to remain oblivious to the glut of activity, ranging from the economic survey, 13th Finance Commission report, inflation data and derivatives expiry to close on a tentative note. The Sensex closed at 16254, down two points and the Nifty ended at 4860, up one point on Thursday

Friday

The Bombay Stock Exchange benchmark Sensex ended the session on Friday with a gain of 175.36 points at 16,429.55 on heavy buying by funds and retail investors in auto, metal and bank counters. Nifty ended up 62.5 points at 4922

CURRENCY

	26-Feb	19-Feb	% Change
INR / USD	46.41	46.32	0.19
USD / Euro	1.34	1.36	(1.47)
Yen / USD	89.40	91.52	(2.32)

BOND MARKETS

	26-Feb	19-Feb	Change
10yr G-Sec Yield	7.86	7.87	(0.01)
1yr G-Sec Yield	5.01	5.33	(0.32)
LIBOR (6m)	0.39	0.39	0.00
LIBOR (1m)	0.23	0.23	0.00
Inter-bank Call Rate	3.2	3.3	(0.07)

VALUATIONS

	P/E	P/B	DIV YLD
BSE	20.2	3.7	1.2
NSE	20.9	3.5	1.0
BSE500 Mcap/GDP Ratio	0.68		

SECTOR

	26-Feb	19-Feb	% Change
Metal	16402	15806	3.8
Bankex	9829	9560	2.8
Capital Goods	13475	13143	2.5
Auto	7171	6998	2.5
IT	5174	5081	1.8
Realty	3237	3189	1.5
Teck	3179	3142	1.2
Healthcare	4913	4862	1.0
Power	2962	2960	0.1
PSU	9214	9222	(0.1)
Oil & Gas	9596	9655	(0.6)
Consumer Durables	4002	4078	(1.9)
FMCG	2662	2753	(3.3)

Disclaimer: This document is compiled by Epitome Global Services Private Limited exclusively for Fullerton Securities & Wealth Advisors Ltd (FSWA) customers. This document is not for public distribution and has been furnished to you solely for your information and you are notified that you should not further copy, modify, use or distribute the information in any way unless you obtain written consent from FSWA. While reasonable care to compile the document but the accuracy and completeness cannot be guaranteed either by FSWA or any other person or entity associated with it. The document is prepared only for your information and is not sufficient for making an investment decision. You should rely on your own investigations and seek professional advice for investment decision. Neither FSWA nor any person connected with it, accepts any liability either arising from the use of this document or due to any inadvertent error in the information contained in this document. Financial investments carry risks including principal risk and therefore you should seek professional advice prior to making any investment decision. The risk of any losses occurring by use of this report or document will be entirely yours. The investments covered in this report are not guaranteed. Also past performance of an investment or fund is not an indication of future performance. FSWA, its affiliates, or associates, or any regulatory or other body or entity assumes no liability or responsibility for investment results or losses arising out of investment decisions made by you. This document is not to be considered as an offer to sell or a solicitation to buy any security or financial product. FSWA reserves the right to modify or alter the terms and conditions of the use of this service or discontinue, temporarily or permanently, the information and services provided (or any part thereof) at any time, with or without prior notice and FSWA shall not be liable to you for any suspension, modification, or termination of the information and services provided herein.



Weekly Newsletter



Volume: 1 | Issue: 48 | Feb 27, 2010

Light Sweet Crude Oil lost 5.3 percent this week closing at \$75.6 from \$79.8 per barrel last week. Gold closed 0.4 percent higher at Rs 16,755 while Silver closed 4.5 percent higher at Rs 26,055 in the Indian market respectively.

COMMODITY	26-Feb	19-Feb	Change	% Change
Crude Oil (USD/bbl)	75.6	79.8	(4.2)	(5.3)
Gold (Rs/10 gm)	16,755.0	16,680.0	75	0.4
Silver (Rs/kg)	26,055.0	24,935.0	1120	4.5

SECTORAL ANALYSIS

Sectoral Performance Analysis

BSE Metal

The BSE Metal Index was the top gainer this week gaining 3.8 percent. Top gainer in this index was Hindalco Industries gaining strong upmove of 7.70 percent followed by Sesa Goa gaining 7.5 percent. Some other gainers in this index were SAIL, JSW Steel and Natl. Aluminium gaining in the range of 4.5 - 5.5 percent.

TOP PERFORMING SECTORS

BSE Metal Gainers	Price		%	Average Volume
	This Wk	Prev. Wk		
Hindalco Inds.	161.25	149.75	7.7	596,930
Sesa Goa	399.95	372.1	7.5	142,633
S A I L	218.45	207.15	5.5	153,466
JSW Steel	1071	1020.45	5.0	43,451
Natl. Aluminium	384.95	367.2	4.8	13,300

BSE Bankex

The BSE Bankex Index was up by 2.8 percent this week. Top gainer in this index was Union Bank gaining 5.8 percent at close. followed by ICICI Bank gaining a strong 5 percent. Some other gainers were Oriental Bank, Canara Bank and Federal Bank gaining in range of 2.5 - 4 percent.

BSE Bankex Gainers	Price		%	Average Volume
	This Wk	Prev. Wk		
Union Bank (I)	256.05	242.1	5.8	119,435
ICICI Bank	871.85	830.5	5.0	95,669
Oriental Bank	273.95	263.6	3.9	12,030
St Bk of India	1975.85	1903.9	3.8	67,643
Canara Bank	391.95	379.85	3.2	6,205
Yes Bank	236.6	229.5	3.1	64,047
Federal Bank	257.25	250.4	2.7	9,425

BSE Capital Goods

The BSE Auto index was up 2.5 percent this week. Frontline gainers were Larsen and Toubro gaining 6.2 percent for the week. The other gainers were Crompton Greaves, Siemens, Suzlon Energy and Alstom Projects all gaining in range of 1.5 - 3 percent.

BSE Capital Goods Gainers	Price		%	Average Volume
	This Wk	Prev. Wk		
Larsen & Toubro	1566.85	1475.3	6.2	75,797
Crompton Greaves	415.55	403.05	3.1	43,170
Siemens	682.95	669.15	2.1	37,033
Suzlon Energy	71.8	70.65	1.6	1,118,544
Alstom Projects	533.8	525.7	1.5	2,988

BSE Auto

The BSE Auto index was up by 2.5 percent. Some gainers in this index were Amtek Auto gaining 7.2 percent followed by Maruti Suzuki gaining 6.8 percent at close. Some other gainers for the week were Hero Honda Motors, Escorts and Tata Motors gaining in range of 1.5 - 5.5 percent.

BSE Auto Gainers	Price		%	Average Volume
	This Wk	Prev. Wk		
Amtek Auto	184.75	172.4	7.2	187,579
Maruti Suzuki	1463.55	1370.3	6.8	24,084
Hero Honda Motor	1772.15	1679.75	5.5	6,650
Escorts	129.65	125.65	3.2	126,903
Tata Motors	711.05	697.9	1.9	57,640

BSE IT

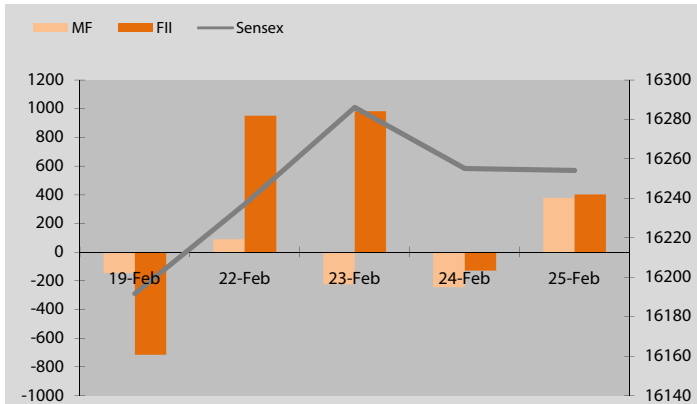
The BSE IT index was up by 1.8 percent. Some gainers were Infosys Tech gaining 2.8 percent followed by Wipro gaining 1.6 percent. Some other stocks that gained were HCL Technologies, TCS and Oracle Financial Services gaining in range of 1.3 - 1.6 percent.

BSE IT Gainers	Price		%	Average Volume
	This Wk	Prev. Wk		
Infosys Tech.	2601.6	2529.55	2.8	13,184
Wipro	676.7	666	1.6	18,378
HCL Technologies	367.45	361.65	1.6	32,978
TCS	761	750.8	1.4	29,606
Oracle Fin.Serv.	2233.75	2205.8	1.3	3,563

This document is compiled by Epitome Global Services Private Limited exclusively for Fullerton Securities & Wealth Advisors Ltd (FSWA) customers. This document is not for public distribution and has been furnished to you solely for your information and you are notified that you should not further copy, modify, use or distribute the information in any way unless you obtain written consent from FSWA. While reasonable care to compile the document but the accuracy and completeness cannot be guaranteed either by FSWA or any other person or entity associated with it. The document is prepared only for your information and is not sufficient for making an investment decision. You should rely on your own investigations and seek professional advice for investment decision. Neither FSWA nor any person connected with it, accepts any liability either arising from the use of this document or due to any inadvertent error in the information contained in this document. Financial investments carry risks including principal risk and therefore you should seek professional advice prior to making any investment decision. The risk of any losses occurring by use of this report or document will be entirely yours. The investments covered in this report are not guaranteed. Also past performance of an investment or fund is not an indication of future performance. FSWA, its affiliates, or associates, or any regulatory or other body or entity assumes no liability or responsibility for investment results or losses arising out of investment decisions made by you. This document is not to be considered as an offer to sell or a solicitation to buy any security or financial product. FSWA reserves the right to modify or alter the terms and conditions of the use of this service or discontinue, temporarily or permanently, the information and services provided (or any part thereof) at any time, with or without prior notice and FSWA shall not be liable to you for any suspension, modification, or termination of the information and services provided herein.

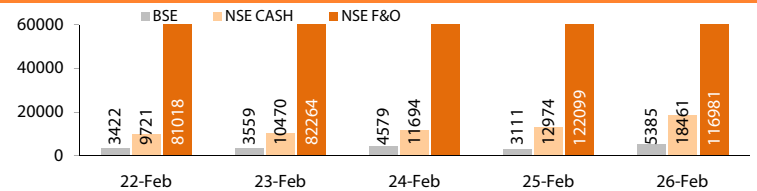
Weekly Newsletter

FII / MF ACTIVITY (Rs. Cr)



	19-Feb	22-Feb	23-Feb	24-Feb	25-Feb
FII Cash Net	293	40	744	616	-244
FII Index Futures	-603	354	546	-700	-242
FII Index Options	-177	186	-581	-250	475
FII Stock Futures	-229	381	273	277	321
FII Stock Options	-1	-9	0	-74	91
FII Net	-716	951	982	-131	401
Open Interest	123280	124139	125632	125862	129726
Mutual Fund	-148	89	-227	-247	378

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.	161.3	7.7%	KGN Industries	330.3	13.9%	Bata India	233.1	25.7%
Maruti Suzuki	1463.6	6.8%	Ruchi Soya Inds.	104.0	11.8%	Glodyne Techno	562.0	15.1%
Larsen & Toubro	1566.9	6.2%	Cadila Health	761.7	8.5%	Rollatainers	220.0	11.1%
Hero Honda Motor	1772.2	5.5%	Amtek Auto	184.8	7.2%	Hind.Natl.Glass	241.1	10.8%
ICICI Bank	871.9	5.0%	Gammon Infra.	24.9	5.7%	TVS Motor Co.	70.4	10.6%

TOP 5 FRONTLINE LOSERS			TOP 5 MIDCAP LOSERS			TOP 5 SMALLCAP LOSERS		
Name	Rs	%▼	Name	Rs	%▼	Name	Rs	%▼
ITC	232.1	-6.5%	Jet Airways	403.1	-13.6%	Geekay Finance	43.6	-23.8%
Rel. Comm.	157.4	-2.8%	HMT	80.7	-13.5%	Titagarh Wagon	347.8	-23.3%
Tata Power Co.	1213.0	-2.2%	Natl.Fertilizer	119.8	-13.2%	Kalindee Rail	165.7	-22.6%
Hind. Unilever	235.8	-2.2%	Texmaco	138.2	-11.7%	IndiaNivesh	376.0	-22.0%
Reliance Inds.	978.0	-0.6%	R C F	92.8	-10.1%	Kwality Dairy	161.1	-21.7%

INSIDER UPDATES

Company	Name	Acquirer Designation	Transaction Date	BUY/SELL	No. of Shares Transacted	Holding after Transaction %
AIA Engineering Ltd	Bhadresh K Shah	Managing Director	11/02/10	SELL	283000	42.01
Cera Sanitaryware Ltd	Mahendra Kumar Bhandari	Investor	10/02/10	SELL	4545	0.05
Cinerad Communications Ltd	India Emerging Capital Pvt Ltd	Strategic Investor	09/02/10	BUY	227696	43.21
Dhampur Sugar Mills Ltd	Gaurav Goel	Managing Director	09/02/10	BUY	10000	1.31
Dhampur Sugar Mills Ltd	Gautam Goel	Managing Director	09/02/10	BUY	10000	1.31
Geometric Ltd	Godrej Investments Pvt Ltd	Strategic Investor	06/02/10	BUY	480	-
GMR Infrastructure Ltd	GMR Holdings Pvt Ltd	Strategic Investor	-	BUY	2000000	74.33
GS Auto International Ltd	Ritu Mercantiles Pvt Ltd	Strategic Investor	05/02/10	SELL	170621	11.62
IBN18 Broadcast Ltd	Reliance Capital Ltd	Strategic Investor	09/02/10	SELL	999616	5.84
Indiabulls Financial Services Ltc	Sloane Robinson LLP	Strategic Investor	10/02/10	SELL	1210000	3.1
Lupin Ltd	Deepak Kasbi	Investor	11/02/10	SELL	290	-
Venlon Enterprises Ltd	Arun Daulatram Datwani	Promoter Family	11/02/10	BUY	15216125	58.26
Visesh Infotecnics Ltd	Seema Aggarwal	Investor	28/01/2010	SELL	371534	3.48
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 Con	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	-
Nucleus Software Exports Ltd	Ravi Pratap Singh	President	03/02/2010	SELL	19995	1.01

Disclaimer: This document is compiled by Epitome Global Services Private Limited exclusively for Fullerton Securities & Wealth Advisors Ltd (FSWA) customers. This document is not for public distribution and has been furnished to you solely for your information and you are notified that you should not further copy, modify, use or distribute the information in any way unless you obtain written consent from FSWA. While reasonable care is taken to compile the document but the accuracy and completeness cannot be guaranteed either by FSWA or any other person or entity associated with it. The document is prepared only for your information and is not sufficient for making an investment decision. You should rely on your own investigations and seek professional advice for investment decision. Neither FSWA nor any person connected with it, accepts any liability either arising from the use of this document or due to any inadvertent error in the information contained in this document. Financial investments carry risks including principal risk and therefore you should seek professional advice prior to making any investment decision. The risk of any losses occurring by use of this report or document will be entirely yours. The investments covered in this report are not guaranteed. Also past performance of an investment or fund is not an indication of future performance. FSWA, its affiliates, or associates, or any regulatory or other body or entity assumes no liability or responsibility for investment results or losses arising out of investment decisions made by you. This document is not to be considered as an offer to sell or a solicitation to buy any security or financial product. FSWA reserves the right to modify or alter the terms and conditions of the use of this service or

Call us at
39400800

