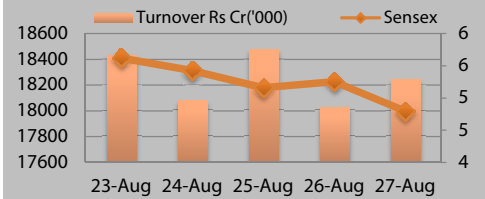
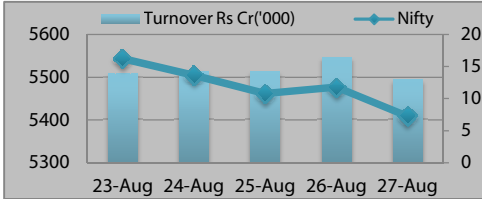


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Open	18,400
High	18,454
Low	17,944
Close	17,998
Change	(404)
Vol (Lacs)	21,067
Turn (Rs Cr)	26,550



Open	5,531
High	5,550
Low	5,392
Close	5,409
Change	(122)
Vol (Lacs)	34,567
Turn (Rs Cr)	72,170

MARKET UPDATE

INDIA

The Indian equity markets ended the week on a Negative note. The BSE Sensex ended the week down by 2.19 percent at 17,998. The NSE Nifty also ended 2.21 percent down at 5409. The BSE Midcap was down by 2.38 percent, whereas the BSE Smallcap ended down by 2.38 percent for the week.

The top performing sector was Consumer Durables followed by FMCG and Capital Goods. The laggards for the week were Metal and Realty.

GLOBAL MARKETS

US markets ended on a negative note on the back of poor economic data. Also the jobless claims stood at 4,73,000. Also in the Fed Meeting Ben Bernake said it will do everything possible to get back US recovery.

The Dow Jones industrial lost 0.62 per cent to 10,151 . The Standard & Poor's 500 index lost 0.69 percent at 1,065. The Nasdaq Composite Index lost 1.21 percent to 2,154.

INDIAN MARKET

	27-Aug	20-Aug	% Change
BSE Sensex	17,998	18,402	(2.19)
S&P CNX Nifty	5,409	5,531	(2.21)
BSE Midcap	7,635	7,821	(2.38)
BSE Smallcap	9,641	9,876	(2.38)
CNX Nifty Junior	11,825	12,106	(2.32)
CNX Midcap	8,758	8,931	(1.94)

GLOBAL MARKETS

	27-Aug	20-Aug	% Change
Dow Jones Ind (USA)	10,151	10,214	(0.62)
Nasdaq Composite (USA)	2,154	2,180	(1.21)
S&P 500 (USA)	1,065	1,072	(0.69)
FTSE 100 (UK)	5,202	5,195	0.13
DAX (Germany)	5,951	6,005	(0.90)
Nikkei 225 (Tokyo)	8,991	9,179	(2.05)
Hang Seng (Hong Kong)	20,597	20,982	(1.83)
Shanghai Comp (China)	2,611	2,642	(1.18)
KOSPI (South Korea)	1,730	1,776	(2.61)
STI (Singapore)	2,939	2,936	0.09
MSCI Emerging Market	366	373	(1.77)
MSCI Frontier Market	517	521	(0.74)

DAILY COMMENTARY

Indian Economic Activity

Food inflation in India declined further in the middle of this month stood at 10.05% in the week ended August 14 versus 10.35% in the previous week.

India's key monsoon rains were 29 % above normal in the week to August. 25, compared with 6 % below normal rainfall in the previous week.

Following are some highlights of the annual Foreign Trade Policy review

- 1) Government confident of \$200 billion exports this fiscal.
- 2) Zero duty Export Promotion Capital Goods (EPCG) scheme extended by one year to March 31, 2012; more products added.
- 3) Duty Entitlement Passbook (DEPB) scheme extended by six months till June 30, 2011.

Bull of the Week : State Bank Of Mysore

It gained 26.7% for the week on news of its planning to merge with SBI. Also, the Bank plans to raise Rs 583 crores via a rights issue. SBI will buy any unsubscribed shares of the Issue.

Upcoming Events to Watch:

- 28th August 2010: Quarterly Results of Pantaloon & Board Meet of Ispat Industries and Pantaloon
- 30th August 2010: US Personal Income
- 31st August 2010: US Consumer Confidence and AGM of Dabur India
- 1st September 2010: AGM of Bharti Airtel, Tata Motors and Jai Corp
- 2nd September 2010: AGM of Neyveli Lignite and Stock Split of Apollo Hospitals
- 3rd September 2010: AGM of Hindalco Industries

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CURRENCY

	27-Aug	20-Aug	% Change
INR / USD	46.88	46.67	0.45
USD / Euro	1.27	1.27	0.00
Yen / USD	85.22	85.61	(0.46)

BOND MARKETS

	27-Aug	20-Aug	Change
10yr G-Sec Yield	7.97	7.93	0.04
1yr G-Sec Yield	6.53	6.43	0.10
LIBOR (6m)	0.50	0.55	(0.05)
LIBOR (1m)	0.26	0.26	0.00
Inter-bank Call Rate	4.5	5.7	(1.17)

VALUATIONS

	P/E	P/B	DIV YLD
BSE	21.5	3.4	1.2
NSE	22.8	3.5	1.1
BSE500 Mcap/GDP Ratio	0.59		

SECTOR

	27-Aug	20-Aug	% Change
Consumer Durables	5772	5692	1.4%
PSU	9695	9707	-0.1%
FMCG	3355	3375	-0.6%
Capital Goods	14723	14888	-1.1%
Oil & Gas	10092	10209	-1.1%
Power	3060	3096	-1.2%
Healthcare	5536	5611	-1.3%
Teck	3380	3430	-1.5%
Auto	8710	8874	-1.9%
IT	5408	5517	-2.0%
Bankex	12216	12527	-2.5%
Metal	14911	15426	-3.3%
Realty	3380	3695	-8.5%



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Light Sweet Crude Oil gained 2.4 percent this week closing at \$75.3 from \$73.5 per barrel last week. Gold gained 0.8 percent closed at Rs 18,863 while Silver closed 4.9 percent higher at Rs 30,271 in the Indian market respectively.

COMMODITY	27-Aug	20-Aug	Change	% Change
Crude Oil (USD/bbl)	75.3	73.5	2	2.4
Gold (Rs/10 gm)	18,863.0	18,714.0	149	0.8
Silver (Rs/kg)	30,271.0	28,860.0	1411	4.9

SECTORAL ANALYSIS

Sectoral Performance Analysis

BSE Consumer Durables

The BSE Consumer Durables index gained 1.4 percent for the week. The top gainer for the week was Videocon Industries gaining 7.3 percent followed by Bajaj Electrical and Titan Industries gaining 4.7 percent and 4.1 percent respectively. Rajesh Exports and Gitanjali Gems lost 0.10 percent and 0.90 percent respectively

TOP PERFORMING SECTORS

BSE Consumer Durables	Price		%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
Videocon Industries	260.9	243.2	7.3	75,728
Bajaj Electrical	276.65	264.25	4.7	15,337
Titan Industries	2977.8	2861.55	4.1	12,777
Rajesh Exports	98.2	98.25	(0.1)	67,171
Gitanjali Gems	205.45	207.35	(0.9)	110,594

BSE FMCG

The BSE FMCG Index lost 0.6 percent this week. The top gainers were Ruchi Soya Inds gaining 8.9 percent followed by Nestle India gaining 6.7 percent. Tata Global gained 5.7 percent, while Dabur India and ITC lost 0.1 percent and 0.9 percent respectively.

BSE FMCG	Price		%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
Ruchi Soya Industries	129.8	119.15	8.9	196,791
Nestle India	3060.05	2868.65	6.7	14,613
Tata Global	117.65	111.3	5.7	149,748
Dabur India	205.95	206.15	(0.1)	37,186
ITC	161.3	162.8	(0.9)	329,583

BSE Capital Goods

The BSE Capital Goods Index lost 1.1 percent this week. The top gainer in this index was Crompton Greaves gaining 4.5 percent followed by Havells India gaining 2.3 percent. Siemens gained 1.2 percent while BHEL closed flat, while Jyoti Structures lost 0.1 percent and Areva T&D lost 0.5 percent.

BSE Capital Goods	Price		%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
Crompton Greaves	298.05	285.3	4.5	41,893
Havells India	813.7	795.35	2.3	26,982
Siemens	715.9	707.1	1.2	17,914
B H E L	2470.1	2469.35	0.0	7,106
Jyoti Structures	141.65	141.8	(0.1)	42,719
Areva T&D	293.15	294.6	(0.5)	26,293

BSE Oil & Gas

The BSE Oil & Gas Index lost 1.1 percent this week. Top gainer in this index was BPCL gaining 11.3 percent followed by ONGC gaining 4.7 percent. Other gainers were HPCL & IOCL gaining 4.6 percent each while GAIL India lost 1.9 percent.

BSE Oil & Gas	Price		%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
B P C L	776.95	697.85	11.3	80,529
O N G C	1317.65	1258.1	4.7	24,222
H P C L	532.5	509.3	4.6	204,799
I O C L	410.1	392.25	4.6	58,599
GAIL (India)	459.45	468.2	(1.9)	61,387

BSE Power

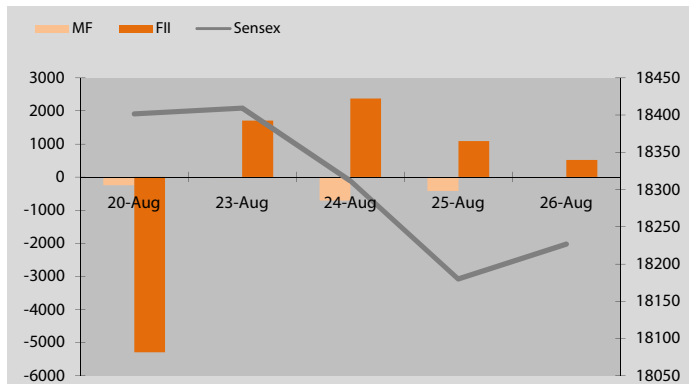
The BSE Power Index lost 1.2 percent this week. Top gainer in this index was Crompton Greaves gaining 4.5 percent followed by JSW Energy gaining 2.6 percent. NTPC gained 1.4 percent while Siemens & Power Grid gained 1.2 percent each.

BSE Power	Price		%	Average
Gainers	This Wk	Prev. Wk	Return	Volume
Crompton Greaves	298.05	285.3	4.5	41,893
JSW Energy	126.9	123.65	2.6	183,650
GVK Power Infra.	46.25	45.55	1.5	808,046
NTPC	195.95	193.25	1.4	81,612
Siemens	715.9	707.1	1.2	17,914
Power Grid Corporation	104.35	103.15	1.2	278,214

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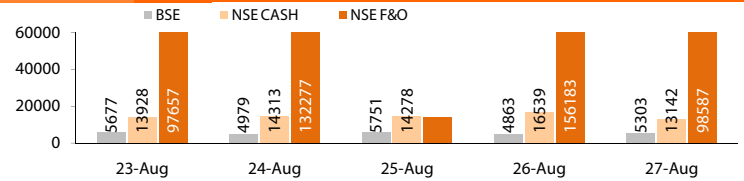
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FII / MF ACTIVITY (Rs. Cr)



	20-Aug	23-Aug	24-Aug	25-Aug	26-Aug
FII Cash Net	713.9	0	903.3	-290.4	156.6
FII Index Futures	-781	-610	-1160	-888	-238.33
FII Index Options	-5048	2225	2836.21	2554	901.13
FII Stock Futures	-133	88.44	-218	-288	-217
FII Stock Options	-50	-1.4	11.2	-2	-82.9
FII Net	-5298	1702	2373	1086	520
Open Interest	190972	195633	197762	198065	201134
Mutual Fund	-247	-4.2	-715.6	-419	-23.2

TURNOVER (Rs. Cr)



MOVERS & SHAKERS

TOP 5 FRONTLINE GAINERS			TOP 5 MIDCAP GAINERS			TOP 5 SMALLCAP GAINERS		
Name	Rs	%▲	Name	Rs	%▲	Name	Rs	%▲
O N G C	1317.7	4.7%	State Bank of Bikaner	744.9	30.4%	Jindal Poly Film	841.8	32.4%
Bharti Airtel	316.2	2.0%	State Bank of Mysore	1167.8	26.7%	Shristi Infra	300.0	29.5%
NTPC	196.0	1.4%	FDC	104.8	18.5%	Surya Pharma.	293.1	28.1%
State Bank of India	2803.1	0.7%	S B T	879.8	17.0%	MSP Steel & Pow.	50.9	27.9%
ACC	870.6	0.2%	Eicher Motors	1245.3	14.5%	Oscar Investment	437.5	23.2%

TOP 5 FRONTLINE LOSERS			TOP 5 MIDCAP LOSERS			TOP 5 SMALLCAP LOSERS		
Name	Rs	%▼	Name	Rs	%▼	Name	Rs	%▼
JP Associates	111.9	-9.2%	MVL	83.4	-19.9%	Subhkam Capital	757.1	-19.3%
Reliance Infra.	982.0	-8.2%	Sobha Developer.	339.0	-12.3%	Mah. Elektrosmelt	405.0	-12.9%
Hindalco Industries	163.6	-8.1%	Pipavav Shipyard	102.2	-12.2%	Ramsarup Inds	67.8	-12.6%
DLF	307.6	-7.5%	Bombay Dyeing	569.5	-11.8%	India Securities	36.8	-12.4%
Hero Honda Motor	1785.0	-6.9%	Geeky Finance	12.1	-11.7%	Sterling Holidays	84.0	-12.1%

INSIDER UPDATES

Company	Name	Acquirer Designation	Transaction Date	BUY/SELL	No. of Shares Transacted	Holding after Transaction %
					Quantity	
Ambika Cotton Mills Ltd	P V Chandran	Chairman & MD	03/08/10	BUY	150000	4.25
Ansal Properties & Infra	Pranav Ansal	Vice Chairman & MD	02/08/10	BUY	50000	7.6
Ansal Properties & Infra	Sheetal Ansal	Promoter	03/08/10	BUY	50000	3.27
Ansal Properties & Infra	Sushil Ansal	Chairman	02/08/10	SELL	50000	10.64
Arshiya International Ltd	Sandesh Chonkar	Investor	29/07/2010	BUY	20000	0.05
Channel Guide India Ltd	Rajendra Karnik	Managing director	28/07/2010	SELL	51000	0
Hindustan Everest Tools Ltd	LIC	Strategic investor	21/07/2010	SELL	32560	4.22
Interworld Digital Ltd	Man Mohan Gupta	Chairman & MD	30/07/2010	SELL	468657	5.94
IRB Infrastructure Developers	Virendra D Mhaiskar	Chairman & MD	30/07/2010	BUY	1323407	32.03
Medicamen Biotech Ltd	Bal Kishan Gupta	Managing director	28/07/2010	BUY	20590	21.51
Nimbus Foods Industries Ltd	Chinar Capital Market Pvt Ltd	Strategic investor	27/07/2010	SELL	1200000	12.85
Shiv-Vani Oil & Gas Exploration	T R S Technology Pvt Ltd	Strategic investor	29/07/2010	BUY	85500	1.61
Sterling Holiday Resorts India	S Sidharth Shankar	Joint MD	26/07/2010	BUY	645000	7.81
Sumeet Industries Ltd	Somani Overseas Pvt Ltd	Strategic investor	21/07/2010	BUY	100000	17.77
Cera Sanitaryware Ltd	Rajendra Kumar Bachhawat	Investor	26/07/2010	SELL	600000	2.2
Marathwada Refractories Ltd	M H Dalmia	Promoter	26/07/2010	BUY	51275	29.11
Sahyadri Industries Ltd	P L Patel	Executive Chairman	26/07/2010	SELL	300000	3.53
Sahyadri Industries Ltd	P L Patel	Executive Chairman	26/06/2010	SELL	300000	3.53
Rids Securities Ltd	Chetan S Kothari	Director	23/07/2010	BUY	683000	6.93
V B Desai Financial Services Ltd	Mrs Dharati J Shroff	Director	22/07/2010	SELL	20000	6.18

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