

US markets and European markets advance

- US stocks rallied sending benchmark indexes to their biggest advance since July, after the economy returned to growth following the worst contraction in seven decades. The Dow Jones, S&P 500 and NASDAQ gained 2.05%, 2.25% and 1.74%, respectively. Caterpillar Inc., Alcoa Inc. and American Express Co. jumped at least 5.1% after the Commerce Department said gross domestic product grew at a 3.5% pace from July through September after shrinking for four straight quarters.
- The benchmark FTSE 100 advanced after faster-than-expected economic growth in the US reignited expectations a seven-month rally is justified by the earnings outlook. The FTSE 100 Index gained 57.30 points, or 1.13%, at 5,137.72. Xstrata Plc led gains in mining shares. Lloyds Banking Group Plc rose 7.5% on expectations it may be able to raise money and avoid a toxic-asset insurance plan.

Index	Latest	1D Chg	YTD
Sensex (29-Oct-09)	16,052.72	(1.42)%	66.40%
Nifty (29-Oct-09)	4,750.55	(1.57)%	60.54%
Nasdaq (29-Oct-09)	1,711.27	1.74%	41.23%
DJIA (29-Oct-09)	9,962.58	2.05%	13.52%
S&P 500 (29-Oct-09)	1,066.11	2.25%	18.03%
FTSE 100 (29-Oct-09)	5,137.72	1.13%	15.87%
CAC 40 (29-Oct-09)	3,714.02	1.37%	15.41%
Nikkei 225 (29-Oct-09)	9,891.10	(1.83)%	11.64%
Hang Seng (29-OCT-09)	21,264.99	(2.28)%	47.80%

SENSEX			
Top Gainers	Close	1DGain	
M&M	927.75	3.93%	
ONGC	1,165.85	2.56%	
Sun Pharmaceuticals	1,404.20	1.92%	

Top Losers	Close	1DLoss	
DLF	375.60	(6.81)%	
Reliance Comm	189.95	(6.45)%	
ICICI Bank	771.25	(4.81)%	

NIFTY			
Top Gainers	Close	1DGain	
M&M	925.00	3.75%	
Ranbaxy	392.75	2.88%	
BPCL	508.00	2.46%	

Top Losers	Close	1DLoss	
DLF	373.00	(7.32)%	
Reliance Comm	188.45	(6.98)%	
Reliance Capital	724.00	(5.88)%	

Sectors	Close	1DGain/(Loss)
Realty	3,820.46	(6.40)%
Metal	13,904.73	(2.58)%
Banking	9,290.23	(2.55)%
FMCG	2,825.93	0.66%

Market Stats	BSE	NSE
Advance-Decline ratio	0.44	0.31
Volume (in'000)	383,100	955,073

Sensex loses more than 200 points

Replicating weak cues from the global markets, the Sensex opened on a pessimistic note at 16,191.39 with a gap down of 92.10 points. Thereafter, the gauge traded range-bound with negative bias for the better part of the morning session as investors remained confused if better earnings and the step-up they had seen self-sustaining or would it die put after Government. Subsequently, in the early afternoon session the measure extended losses as a rise in the inflation number weighed on investors' sentiments. However, in the late afternoon session the measure pared its losses as the US dollar resumed its slide against a basket of major currencies. Thereafter, in the last session of trade the markets slipped once again and touched the intraday low of 15,993.83 owing to selling pressure in the Realty, Metals and Banking stocks. The Sensex, however, managed to hold on to the 16,000 mark and finally ended the session at 16,052.72 after making a significant loss of 230.77 points or 1.42%.

The Nifty ended the session below the 4,800 mark at 4,750.55 after a loss of 75.60 points or 1.57%.

Commodities Market

Crude oil fell after concerns that fuel demand has yet to recover. Gold rose on a sliding dollar. Copper prices rose after a report showed that the US economy expanded for the first time in a year.

SENSEX

Open: 16,191.39; Close: 16,052.72;
Prv. Close: 16,283.49



Dow Jones

Open: 9,762.91; Close: 9,962.58;
Prv. Close: 9,762.69



FTSE 100

Open: 5,054.54; Close: 5,137.72;
Prv. Close: 5,080.42



International News

Headlines:



Most Active Stocks by Value (in Cr)

BSE	Close	%Chg	Value	Volume
HDIL	329.00	(5.31)%	186	5,547,956
Unitech	80.85	(7.07)%	181	21,992,627
Sesa Goa	300.10	1.47%	165	5,626,504
Think Soft	220.50	3.98%	160	7,391,343
SBI	2,195.00	(1.05)%	145	660,657

NSE	Close	%Chg	Value	Volume
ICICI Bank	777.70	(3.92)%	821	10,486,709
SBI	2,190.05	(1.03)%	805	3,668,096
RIL	1,986.00	(2.37)%	711	3,530,103
Unitech	81.90	(5.75)%	606	73,627,168
Tata Motors	547.50	(2.59)%	560	10,223,444

Most Active Calls by Contract Value (in Cr)

	Value	Price	% Chg
Nifty 4800 Call Oct-09	11,202	0.05	(99.88)%
Nifty 4900 Call Nov-09	2,371	83.30	(24.03)%

Most Active Puts by Contract Value (in Cr)

Nifty 4800 Put Oct-09	9,572	45.00	113.27%
Nifty 4700 Put Oct-09	3,873	0.05	(97.73)%

Most Active Future Contracts by Value (in Cr)

Nifty Oct-09	11,913	4,750.25	(1.58)%
Nifty Nov-09	10,553	4,779.00	(1.20)%

Top Contracts by Change in Open Interest

Contract	Change in OI	Price	% Chg
IFCI Nov-09	24,853,520	45.00	(4.76)%
UNITECH Nov-09	24,066,000	82.50	(5.44)%

FII open positions in Derivatives (NSE)

	Idx Fut	Ind Opt	Stk Fut	Stk Opt
No of Contracts	1,078,513	2,169,308	1,243,466	71,914
Amt (in cr.)	25,333	52,646	37,753	2,281

FII (Rs. Cr.)*	29-Oct-09	MTD	YTD
Equity inflows	2,995	60,040	484,968
Equity outflows	5,542	60,616	467,360
Net	(2,547)	(576)	17,607

DII (Rs. Cr.)*	29-Oct-09	MTD	YTD
Equity inflows	2,654	28,250	252,140
Equity outflows	1,677	28,846	228,950
Net	977	(596)	23,191

* FII & DII data is provisional in nature

Commodities	Latest	1DChg
Crude (USD/bbl) (Oct 29, 2009)	77.03	(0.56)%
Gold (USD/oz) (Oct 29, 2009)	1047.10	1.61%
Cu (USD/lb) (Oct 29, 2009)	3.03	3.38%

X-rate	29-Oct-09	1DChg	1MChg
USD/Rs.	47.5	0.78%	(1.08)%
GBP/Rs.	77.9	1.00%	1.88%
EUR/Rs.	70.0	0.16%	(0.38)%
JPY/Rs.	52.6	1.80%	(1.46)%

ADR/GDR (USD)	29-Oct-09	1DChg
Dr Reddy's	21.18	3.72%
HDFC Bank	117.13	4.05%
ICICI Bank	33.67	2.09%
Infosys	47.26	1.88%
Wipro	18.65	2.64%
Tata Communications	17.25	(4.70)%
Tata Motors	12.16	4.11%
MTNL	3.09	(0.64)%
Patni	19.52	1.56%
Sterlite	16.35	5.28%

Macro Economic Indicators	
GDP Growth*	6.70%
Inflation (week ended Oct 17, 2009)	1.51%
Index of Industrial Production (IIP) growth (August)	10.40%
CRR (Oct 29, 2009)	5.00%
SLR (w.e.f. Nov 07, 2009)	25.00%

* As per CSO Estimate for 2008-09

- The US economy grew in the third quarter for the first time in more than a year, propelled by stimulus-driven gains in consumer spending and home building. The world's largest economy expanded at a 3.5% pace from July through September after shrinking the previous four quarters, figures from the Commerce Department showed in Washington. (Bloomberg)
- European factories increased capacity usage on assembly lines for the first time in two years this quarter. Assembly-line activity in the Euro area rose to 70.7% of the total capacity this quarter from 69.6% in the three previous months, the European Commission in Brussels said. (Bloomberg)
- UK mortgage approvals climbed to their highest level for 18 months in September, adding to signs that the housing market is recovering from a rout. Lenders granted 56,215 home loans, compared with 52,970 in August, the Bank of England said in a report in London. (Bloomberg)

Corporate Announcements – India:

- ONGC** reported a 6% increase in its net profit at Rs 50.89 bn during the second quarter ended September 30, 2009. The profits were lower by Rs. 14.91 bn as the Company, complying with the Government's regulations, paid Rs. 26.30 bn fuel subsidy by way of discounts on the crude oil it sells to state-run refiners. (BS)
- Sterlite Industries** profit declined by 24.91% for the quarter ending September. The profit for the second quarter of the current financial year was Rs. 9.58 bn. The company had posted a net profit of Rs. 12.76 bn in the corresponding quarter last financial year. (BS)
- Mahindra & Mahindra** reported a net profit of Rs. 8.43 bn for the second quarter ended September 30, 2009, driven by good sales in both automotive and farm equipment sectors. (BS)

Economic and Political Headlines:

- Inflation grew by 1.51% as of October 17 on the back of higher food prices, vindicating the Reserve Bank's hawkish stance of slowly withdrawing its easy money policy. During the week, tea, mutton, *arhar* and manufactured food items including edible oil and *gur* turned expensive. (BS)

BSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
BAJAJHINDLTD	JUPITER ENTERPRISES LTD	SELL	1,472,013	209.75
BHARATI SHIP	RELIANCE CAPITAL MUTUAL FUND	SELL	135,000	160.04
CHAN GUIDE I	BAKLIWAL FINANCIAL SERVICES INDIA PVT. LTD.	SELL	62,150	85.64
CHEMCEL	KAMLESH NAHAR	BUY	200,000	11.67
EXCEL INFO	JATIN LAXMIKANT TRIVEDI	BUY	107,850	73.80
EXCEL INFO	JATIN LAXMIKANT TRIVEDI	SELL	124,999	73.25
GOLDE LAMINA	SUDHIR KUMAR SINGAL	SELL	114,400	17.61
GUJRAT TERCE	AMRIT BHAI P PRAJAPATI	SELL	50,000	18.22
HIMLA INTERN	HITESH SHASHIKANT JHAVERI	BUY	200,026	35.54
HIMLA INTERN	HITESH SHASHIKANT JHAVERI	SELL	170,214	35.55
JAI MATA GLA	CHHAYA DILIP SHAH	BUY	72,000	2.75
JAI MATA GLA	MANSI MILAN CHOKSI	BUY	151,974	2.75
JAI MATA GLA	MOTI LAL BHASIN	SELL	200,000	2.75
LANCOR HOLDS	Sundaram BNP Paribas Mutual Fund	BUY	250,000	107.00
LOTUS CHOC C	VARIJA KAMATH	BUY	105,978	36.91
MANGALA TIM	AMAM SHREYANS SHAH	SELL	199,869	26.00
MANGALA TIM	GANESHKUMAR SINGHANIA	BUY	206,880	25.99
NATRAJ FIN	GOYAL HOUSING AND FINANCE LIMITED	SELL	63,540	43.25
NIYAT INDUST	JAMSHED HAMSHEED SIDDIQ KHAN	SELL	618,000	1.17
NIYAT INDUST	VEENABEN PRAKASHBHAJ SHAH	BUY	630,000	1.17
OMKAR OVERSE	DINESHKUMAR RAMCHANDRA PANDEY	BUY	84,300	56.07
OMKAR OVERSE	HIREN KIRIT GANDHI	BUY	74,000	56.05
OMKAR OVERSE	SANTOSH ABHAYRAJ SHUKLA	BUY	57,722	56.17
RADHE DEVELO	RAVI VASANTBHAI PAWAR	SELL	1,287,768	8.36
RANKLIN SOLU	OM PARKASH GUPTA	BUY	53,314	33.91
RISHABHDEV	ARIHANT SEC & INVESTMENT	BUY	226,396	20.12
RISHABHDEV	ARIHANT SEC & INVESTMENT	SELL	129,047	20.19
RISHABHDEV	HANURANG VINIMAY PVT LTD	BUY	100,000	20.50
RISHABHDEV	NIRAJ HARSUKH SANGHVI	BUY	268,075	19.82
RISHABHDEV	NIRAJ HARSUKH SANGHVI	SELL	227,304	20.18
RISHABHDEV	ROSY DEAL COMM PRIVATE LIMITED	BUY	75,000	20.36
RISHABHDEV	SARSWATI VINCOM LTD	BUY	100,000	20.20
RISHABHDEV	TOUCHSTONE FINVEST SERVICES PVT LTD	BUY	230,493	20.19
RISHABHDEV	TOUCHSTONE FINVEST SERVICES PVT LTD	SELL	190,493	20.25
SANGUINE MD	YASHWANT SANJAY KARKHANIS	BUY	73,603	3.62
STER HOL RES	MAHESH CHIMANLAL DALAL	BUY	300,000	66.50
STER HOL RES	SUNIDHI SECURITIES & FINANCE LTD	SELL	300,000	66.50

SUPERTEX IND	JITENDRA LAXMICHANDJI GANDHI	BUY	500,000	4.46
TECHTRAN POL	NIRMAL INVESTMENTS	SELL	63,600	21.19
WELL PACK PA	BUNIYAD CHEMICALS LTD	BUY	50,000	275.84

Note: Bulk Deals over and above 50,000 shares are only considered

NSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
BAJAJHIND	JUPITER ENTERPRISES LTD	SELL	1,480,160	209.20
CORDSCABLE	NIYOJOSH	BUY	89,817	45.82
DISHTV	CREDIT SUISSE (SINGAPORE) LIMITED	SELL	2,822,200	34.86
DISHTV	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	SELL	4,192,706	34.48
EXCELINFO	PARESH SANATKUMAR RACHH	BUY	194,040	71.67
EXCELINFO	PARESH SANATKUMAR RACHH	SELL	186,659	72.12
IFCI	CREDIT SUISSE (SINGAPORE) LIMITED	SELL	5,744,520	45.14
ISPATIND	CREDIT SUISSE (SINGAPORE) LIMITED	SELL	6,274,800	19.75
ISPATIND	JAYPEE CAPITAL SERVICES LTD.	BUY	7,718,211	20.07
ISPATIND	JAYPEE CAPITAL SERVICES LTD.	SELL	6,685,541	20.16
LUPIN	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	SELL	874,564	1,217.14
PETRONENGG	DERIVE TRADING PVT LTD	BUY	75,000	193.31
SUZLON	CITIGROUP GLOBAL MKTS MAURITIUS PVT LTD- SELL CODE	SELL	10,100,000	71.19

Note: Bulk Deals over and above 50,000 shares are only considered

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