

# DAILY MARKET REVIEW

## MARKET SUMMARY

Market traded cautiously ahead of SEBI meeting on P-notes. Sensex closed at 15093, down 119 points, while Nifty shed 23 points to close at 4529. However, midcap and smallcap stocks were relatively stronger as BSE Midcap index was down just 0.1% while small cap index was in fact up 0.13%. On the back of sharp fall in ADRs, private sector banks, viz. HDFC bank and ICICI bank ended down sharply in today's trade. SEBI board, in a meeting today, is likely to review restrictions on P-notes as introduced in October 07, to review new norms introduced in last 10 months and primary market reforms.

Among sectoral indices, BSE Bankex and Realty indices were down the most, losing 2.2% and 1.3% respectively, while IT and Healthcare indices ended with gains of 1.1% and 1.05% respectively. Sterlite and Infosys were top sensex gainers, up 2.7% and 1.3% respectively while ICICI bank and HDFC Bank were down 3.8% and 3.7% respectively. BSE advance-decline ratio stood at 1:1.14..

## MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
<b>NIFTY</b>	4548.05	4572.65	4497.25	4529.05	-23.20	-0.51
<b>SENSEX</b>	15030.21	15272.56	15013.06	15093.12	-119.01	-0.78
<b>MIDCAP</b>	5956.27	5993.78	5919.92	5929.37	-6.16	-0.1
<b>SMLCAP</b>	7231.04	7283.33	7204.77	7229.77	9.35	0.13
<b>BSE-100</b>	7880.99	7999.04	7863.44	7913.11	-45.74	-0.57
<b>BSE-200</b>	1844.19	1870.07	1840.11	1849.95	-10.21	-0.55
<b>BSE-500</b>	5830.84	5906.82	5816.73	5844.37	-28.09	-0.48

## SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
<b>BANKEX</b>	7266.68	7400.63	7227.30	7271.40	-165.87	-2.23
<b>REALTY</b>	5644.25	5769.86	5591.79	5610.83	-74.66	-1.31
<b>CG</b>	12659.73	12827.38	12586.19	12606.94	-133.35	-1.05
<b>CD</b>	3899.85	3949.46	3868.41	3883.69	-32.28	-0.82
<b>POWER</b>	2725.43	2765.15	2716.28	2729.84	-14.17	-0.52
<b>PSU</b>	7169.10	7244.36	7125.31	7184.00	-26.33	-0.37
<b>AUTO</b>	3979.54	4017.29	3944.67	3990.07	-9.63	-0.24
<b>METAL</b>	12562.05	12841.66	12562.05	12643.23	-17.50	-0.14
<b>OIL&amp;GAS</b>	10363.44	10533.17	10320.60	10438.99	-3.29	-0.03
<b>FMCG</b>	2208.09	2241.52	2204.66	2226.30	4.15	0.19
<b>TECK</b>	3012.45	3056.64	3002.75	3043.11	15.23	0.50
<b>HC</b>	4226.98	4303.33	4216.98	4279.90	44.66	1.05
<b>IT</b>	3745.12	3826.19	3729.12	3813.96	41.98	1.11

## SENSEX MOVERS

### TOP GAINER

Company	Price	Gain %
STERLITE IN	613.00	2.67
INFOSYS TECH	1625.20	1.34
TCS LTD.	828.05	1.20
SATYAM COMP	406.25	0.87
NTPC LTD	186.40	0.57

### TOP LOSERS

Company	Price	Loss %
ICICI BANK L	710.55	-3.77
HDFC BANK LT	1217.20	-3.69
DLF LIMITED	548.60	-3.29
REL INFRA	1067.85	-2.45
HOUSING DEVE	2414.10	-2.13

## GROUP A MOVERS

### TOP GAINER

Company	Price	Gain %
DISH TV	39.75	10.26
UCO BANK	40.80	10.12
TORRENT POWER	119.35	7.52
GSPL	64.85	6.14
REL.IND.INFRA	969.30	5.00

### TOP LOSERS

Company	Price	Loss %
TATA CHEM	315.50	-6.57
PFC	138.70	-5.81
LANCO INFRA	325.05	-5.26
INDIAN BANK	121.10	-5.13
TRIVENI ENGG.	112.20	-4.79

## TOP TRADED SENSEX STOCKS

Company	Turnover (Rs Cr)
RELIANCE	214.15
ICICI BANK L	136.86
L&T	131.43
SBI	108.92
REL INFRA	108.09

## TURNOVERS (Rs CR)

Segment	Today	Yesterday
BSE Cash	5069.69	5868.90
NSE Cash	12052.24	13926.59
NSE F&O	43947.06	52461.81
<b>Total</b>	<b>61068.99</b>	<b>72257.30</b>

## MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
1238	1420	91	2749

## CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	1	87	11	28	5	21	153
Lower Circuit	0	46	9	20	1	20	96
<b>Total</b>	<b>1</b>	<b>133</b>	<b>20</b>	<b>48</b>	<b>6</b>	<b>41</b>	<b>249</b>

## BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
13-Aug	BIHAR TUBES	SAROJINI FINANCE & INVT	SELL	390000	165.01	2.94
13-Aug	MAN ALUMINIUM	THE BANK OF NEWYORK GDR	SELL	35701	29.60	1.06
13-Aug	SESA GOA	GOLDMAN SACHS INVTS MAURI	SELL	374000	175.42	0.95
13-Aug	ZEE NEWS	BLACKSTONE ASIA ADVISORS	SELL	2020000	40.17	0.84

## BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
13-Aug	CERA SANITARY	DEUTSCHE INTERNATIONAL	SELL	34820	129.05	0.56
13-Aug	EVERONN SYSTEMS	VIMLA SURESJH JAJOO	SELL	79783	528.90	0.58
13-Aug	MAN ALUMINIUM	THE BANK OF NEWYORK - GDR	SELL	61717	29.69	1.83
13-Aug	MERCATOR LINES	DEUTSCHE SECURITIES MAURI LTD	SELL	1250000	88.44	0.53
13-Aug	NOIDA TOLLBRIDGE	CITIGROUP GLOBAL MKTS MAURI	SELL	1150000	46.61	0.62
13-Aug	OCTAV INVT.	RELIANCE MUTUAL FUND	SELL	40000	81.71	1.33
13-Aug	SEL MFG	MAVI INVESTMENT FUND LTD.	BUY	300000	379.91	1.97
13-Aug	SEL MFG	TAIB BANK A/C TSML	SELL	219864	395.47	1.44
13-Aug	SUBEX LTD	ICICI PRUDENTIAL ASSET MGMT	BUY	283000	91.99	0.81
13-Aug	SUBEX LTD	NOMURA INDIA INVESTMENT FUND	SELL	200000	95.84	0.57
13-Aug	ZEE NEWS	BLACKSTONE Asia Advisors	SELL	2034000	40.19	0.85

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