

DAILY MARKET REVIEW

MARKET SUMMARY

Equity market sold off on the first day of the July series on the back of surging crude and extremely weak global cues. Sensex closed at 13802, the lowest close after 10th May 2007. Nifty lost 179 points or 4.2% to close at 4136. On the weekly basis too, for the first time after April 2001, sensex has closed down for the six consecutive weeks. Week on week, sensex is down 5.27%. Yesterday, U.S. markets sold off on the back of more than 5\$ surge in crude oil and disappointing earnings from tech giants. The Dow Jones lost 350 points to close at the lowest level since September 2006.

Back home, inflation for the week ended June 14 came at 11.42% as against 11.05% in earlier week. All the sectoral indices ended in red in today's trade. BANKEX and Auto, two most interest rate sensitive indices, lost 5.3% each while power, metal and realty indices followed with losses of 4.9%, 4.5% and 4.4% respectively. Among the sensex stocks, Tata Motors, HDFC and Wipro were the top losers. Advance-decline was very negative with 601 shares advancing against 2051 declining.

MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
NIFTY	4315.30	4315.30	4119.20	4136.65	-179.20	-4.15
SENSEX	14127.76	14127.76	13760.24	13802.22	-619.6	-4.30
MIDCAP	5699.91	5699.91	5542.35	5558.75	-183.29	-3.19
SMLCAP	7100.81	7100.81	6929.53	6938.07	-191.01	-2.68
BSE-100	7400.64	7400.64	7206.74	7228.84	-321.11	-4.25
BSE-200	1731.88	1731.88	1686.89	1691.44	-73.09	-4.14
BSE-500	5492.1	5492.1	5354.7	5367.19	-223.91	-4.00

SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
BANKEX	6311.45	6311.45	6096.91	6125.95	-345.64	-5.34
AUTO	3878.29	3878.29	3674.49	3689.92	-204.83	-5.26
POWER	2396.04	2396.04	2330.19	2335.26	-119.55	-4.87
METAL	13651.77	13838.15	13237.23	13292.45	-630.96	-4.53
REALTY	4899.41	4984.28	4841.49	4875.25	-227.18	-4.45
PSU	5976.44	5976.44	5802.67	5821.62	-261.09	-4.29
IT	4083.78	4083.78	3989.67	4004.75	-177.11	-4.24
CG	10674.02	10674.02	10377.52	10442.14	-445.09	-4.09
TECK	3158.43	3158.43	3077.25	3093.63	-124.29	-3.86
FMCG	2142.83	2142.83	2062.44	2073.15	-69.47	-3.24
CD	3754.40	3754.40	3597.65	3649.33	-117.73	-3.13
OIL&GAS	9428.35	9644.64	9312.22	9387.63	-289.75	-2.99
HC	4187.17	4214.36	4100.70	4150.05	-59.10	-1.40

SENSEX MOVERS

TOP GAINER

Company	Price	Gain %

TOP LOSERS

Company	Price	Loss %
TATA MOTORS	445.05	-8.24
HDFC	2028.15	-8.15
WIPRO	436.60	-7.78
REL INF	876.00	-7.72
M&M	503.00	-7.61

GROUP A MOVERS

TOP GAINER

Company	Price	Gain %
CONCOR	794.00	2.43
ASIAN PAINTS	1197.30	1.47
GLAXOKLINE	1126.20	1.47
CAIRN INDIA	275.20	1.47
HIND.ZINC	532.00	1.30

TOP LOSERS

Company	Price	Loss %
HIND.CONSTRUCT.	84.05	-13.35
PHOENIX MILLS	163.70	-13.11
NALCO	332.80	-9.98
SINTEX INDS.	325.35	-9.09
TRIVENI ENGG.	70.05	-9.03

TOP TRADED SENSEX STOCKS

Company	Price
RELIANCE	540.26
ACC	374.67
TATA STEEL	258.38
L&T	163.88
BHARTI	105.55

TURNOVERS (RS CR)

Segment	Today	Yesterday
BSE Cash	6015.06	5197.87
NSE Cash	12728.29	15803.95
NSE F&O	45408.54	79103.71
Total	64151.89	100105.53

MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
601	2051	54	2706

CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	0	64	9	14	1	19	107
Lower Circuit	2	169	28	39	7	42	287
Total	2	233	37	53	8	61	394

BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
27-Jun	ASIAN PAINTS	GEETANJALI TRADING & INVT LTD	BUY	617400	1173.98	0.64
27-Jun	BIRLA LEASING	BIRLA BOMBAY PVT LTD	SELL	3039500	5.98	7.78
27-Jun	CARBORUNDUM UNIV	MERRILL LYNCH CAPITAL MARKET	BUY	3835000	129.99	4.11
27-Jun	CARBORUNDUM UNIV	RELIANCE LONG TERM EQ FUND	SELL	3425000	130.00	3.67
27-Jun	CHAMPAGNE INDAGE	AMERICAN FUNDS INSURANCE	BUY	180510	426.99	1.18
27-Jun	CHAMPAGNE INDAGE	CAPITAL GROUP SMALL CAP FND	BUY	165136	426.99	1.08
27-Jun	CHAMPAGNE INDAGE	VONTOBEL FUND FAR EAST EQUITY	SELL	343025	427.00	2.25
27-Jun	GEOMETRIC LTD	FIDELITY INVT FUNDS MAURI LTD	SELL	5775001	43.50	9.30
27-Jun	GEOMETRIC LTD	MATTERHORN VENTURES LIMITED	BUY	5775001	43.50	9.30
27-Jun	GREENPLY INDS.	AENEAS PORTFOLIO CO LP FDI	SELL	648868	158.00	3.82
27-Jun	GREENPLY INDS.	CREDIT SUISSE SINGAPORE LTD	BUY	648868	158.00	3.82
27-Jun	GWALIOR CHEMICAL	MORGAN STANLEY MAURI CO LTD	BUY	143000	107.14	0.58
27-Jun	INDIA CEMENTS	HSBC GLOBAL INVT FUND MAURI	BUY	3982400	149.75	1.41
27-Jun	INDIA CEMENTS	MORGAN STANLEY INVT MAURI LTD	SELL	3982400	149.75	1.41
27-Jun	REFEX REFRIGERAN	HIMMAT PARSHOTTAMBHAI JATANIA	BUY	330000	223.14	2.13
27-Jun	REFEX REFRIGERAN	TUSHAR RAMESHBHAI PATEL	SELL	394000	221.21	2.55

BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
27-Jun	CARBORUNDUM UNIV	MERRILL LYNCH CAPITAL MARKET	BUY	612000	129.94	0.66
27-Jun	GTC INDS.	CAPITAL GROWTH INVESTMENT LTD	SELL	125000	148.65	0.71
27-Jun	GWALIOR CHEMICAL	MORGAN STANLEY MAURITIUS CO	BUY	245000	107.09	0.99
27-Jun	HINDUJA VENTURES	HAMON ASSET MGMT LTD.	BUY	194667	219.00	0.95
27-Jun	HINDUJA VENTURES	ICICI BANK LTD.	SELL	194667	219.00	0.95

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