

US markets end mixed and European markets decline

- US stocks fell, after a late-day rally in the Standard & Poor's 500 Index failed to erase losses, as Moody's Investors Service said it may downgrade Greek debt and reports on jobs and manufacturing orders trailed forecasts. The Dow Jones, S&P 500 fell 0.51% and 0.21%, respectively, while NASDAQ gained 0.02%. The S&P 500's retreat shrank as Apple Inc. reversed its drop, rising 0.7% amid speculation the iPhone maker will split its stock, and as the euro rose versus the dollar. DuPont Co., American Express Co. and Boeing Co. helped lead losses in the Dow Jones Industrial Average. Coca-Cola Co., lost 3.7% after agreeing to buy Coca-Cola Enterprises Inc.'s North American bottling division.
- The benchmark FTSE 100 retreated as mining companies followed metals prices lower and an unexpected increase in US jobless applications raised concern the global economic recovery may falter. The FTSE 100 Index fell 64.69 points, or 1.21%, and ended at 5,278.23. Xstrata Plc and Rio Tinto Group lost more than 3% as base metals fell in London. British American Tobacco Plc dropped 2.3% as reported net income that missed analysts' estimates.

Index	Latest	1D Chg	YTD
Sensex (25-Feb-10)	16,254.20	(0.01)%	(6.93)%
Nifty (25-Feb-10)	4,859.75	0.02%	(6.56)%
Nasdaq (25-Feb-10)	1,812.91	0.02%	(2.55)%
DJIA (25-Feb-10)	10,321.03	(0.51)%	(1.03)%
S&P 500 (25-Feb-10)	1,102.94	(0.21)%	(1.09)%
FTSE 100 (25-Feb-10)	5,278.23	(1.21)%	(2.49)%
CAC 40 (25-Feb-10)	3,640.77	(2.02)%	(7.51)%
Nikkei 225 (25-Feb-10)	10,101.96	(0.95)%	(4.21)%
Hang Seng (25-Feb-10)	20,399.57	(0.33)%	(6.73)%

SENSEX

Top Gainers	Close	1DGain
L&T	1,536.85	2.47%
Maruti Suzuki	1,401.05	2.37%
Hero Honda Motors	1,696.50	1.44%

Top Losers	Close	1DLoss
HUL	235.35	(2.71)%
Tata Motors	668.70	(2.69)%
JaiPrakash Associates	129.40	(2.27)%

NIFTY

Top Gainers	Close	1DGain
IDEA	59.35	2.42%
SAIL	213.40	2.40%
L&T	1,535.00	2.25%

Top Losers	Close	1DLoss
HUL	235.00	(2.95)%
NTPC	199.70	(2.30)%
JaiPrakash Associates	129.60	(2.26)%

Sectors	Close	1DGain/(Loss)
Capital Goods	13,333.25	1.27%
IT	5,188.92	0.55%
Oil & Gas	9,493.53	(1.05)%
FMCG	2,723.29	(0.83)%

Market Stats	BSE	NSE
Advance-Decline ratio	0.84	0.70
Volume (in'000)	247,700	627,690

Sensex witnesses another lackluster session

The Sensex opened slightly higher, triggered by Federal Reserve Chairman Ben Bernanke's reassurance on Wednesday that the US interest rates will remain at a record low. Thereafter, the Index made rapid losses and fell almost 150 points as it tracked weakness in the most of the regional peers and lower US index futures, and hit the intraday low of 16,167.13. Subsequently, the bourse moved up steadily, boosted by the Finance Ministry's Economic Survey for 2009-2010 tabled in the Parliament. The survey predicted that India will bounce back to a high 9% growth in 2011-12 on its way to becoming the world's fastest growing economy in the next four years. The Index recovered most of its losses in the last hour owing to the marginal decline in food inflation and the country's core sector after registering a 9.4% growth in January 2010. The Sensex finally ended the session flat at 16,254.20, losing only 1.77 points or 0.01%.

The Nifty ended the day at 4,859.75, gaining a mere 1.15 points or 0.02%.

Commodities Market

Crude oil declined after US economic reports increased concerns that the economic recovery in the world's biggest energy-consuming nation may stall. Gold fell to the lowest price in almost two weeks in as a stronger dollar eroded demand for the metal as an alternative investment. Copper fell to the lowest price in more than a week as a rally in the dollar reduced the appeal of industrial metals as an alternative investment.

SENSEX

Open: 16,264.10; Close: 16,254.20;
Prv. Close: 16,255.97



Dow Jones

Open: 10,366.60; Close: 10,321.03;
Prv. Close: 10,374.16



FTSE 100

Open: 5,341.56; Close: 5,278.23;
Prv. Close: 5,342.92



International News

Headlines:



Most Active Stocks by Value (in Cr)

BSE	Close	%Chg	Value	Volume
D B Realty Ltd	450.85	(1.00)%	150	3,285,723
Hathway Cable	207.80	(13.42)%	136	6,249,043
Mphasis Ltd.	673.35	(8.43)%	70	1,018,852
RIL	964.35	(1.31)%	68	698,049
Syncom Healthcare	93.60	6.79%	66	7,011,651

NSE	Close	%Chg	Value	Volume
RIL	968.20	(1.08)%	420	4,332,580
SBI	1,923.00	0.09%	414	2,161,596
L&T	1,535.00	2.25%	371	2,427,026
ICICI Bank	851.50	1.23%	368	4,353,477
Tata Motors	670.00	(2.11)%	313	4,692,977

Most Active Calls by Contract Value (in Cr)

Contract	Value	Price	% Chg
Nifty 4900 Call Feb-10	12,479	0.05	(99.61)%
Nifty 4800 Call Feb-10	8,675	53.90	(20.97)%

Most Active Puts by Contract Value (in Cr)

Contract	Value	Price	% Chg
Nifty 4800 Put Feb-10	12,441	0.05	(99.67)%
Nifty 4900 Put Feb-10	6,681	39.95	(16.86)%

Most Active Future Contracts by Value (in Cr)

Contract	Value	Price	% Chg
NIFTY Feb-10	11,088	4,860.10	(0.04)%
NIFTY Mar-10	8,671	4,869.90	0.32%

Top Contracts by Change in Open Interest

Contract	Change in OI	Price	% Chg
IFCI Mar-10	28,226,160	48.00	(0.83)%
UNITECH Mar-10	16,047,000	70.75	(0.28)%

Fill open positions in Derivatives (NSE)

	Idx Fut	Ind Opt	Stk Fut	Stk Opt
No of Contracts	926,569	2,671,250	1,014,175	74,206
Amt (in cr.)	22,131	65,385	32,026	2,557

FII (Rs. Cr.)*	25-Feb-10	MTD	YTD
Equity inflows	2,363	35,467	91,576
Equity outflows	2,958	38,280	101,606
Net	(595)	(2,813)	(10,030)

DII (Rs. Cr.)*	25-Feb-10	MTD	YTD
Equity inflows	1,699	20,010	59,015
Equity outflows	1,373	17,806	44,588
Net	326	2,204	14,426

* FII & DII data is provisional in nature

Commodities	Latest	1DChg
Crude (USD/bbl) (Feb 25, 2010)	78.45	(1.94)%
Gold (USD/oz) (Feb 25, 2010)	1088.50	(0.79)%
Cu (USD/lb) (Feb 25, 2010)	3.21	(1.35)%

X-rate	25-Feb-10	1DChg	1MChg
USD/Rs.	46.4	0.24%	0.41%
GBP/Rs.	71.0	(0.60)%	(5.21)%
EUR/Rs.	62.4	(0.34)%	(4.37)%
JPY/Rs.	51.8	1.07%	1.13%

ADR/GDR (USD)	25-Feb-10	1DChg
Dr Reddy's	24.50	(0.20)%
HDFC Bank	120.94	(0.44)%
ICICI Bank	36.85	0.68%
Infosys	56.79	0.57%
Wipro	21.21	0.95%
Tata Communications	12.37	(1.43)%
Tata Motors	14.85	(2.30)%
MTNL	3.03	(1.62)%
Patni	20.79	(1.56)%
Sterlite	16.43	(0.60)%

Macro Economic Indicators	
GDP Growth*	6.70%
Inflation (for the month of January, 2010)	8.56%
Index of Industrial Production (IIP) growth (December)	16.80%
CRR (Feb 25, 2010)	5.50%
SLR (Feb 25, 2010)	25.00%

* As per CSO Estimate for 2008-09

- The number of Americans filing first-time claims for unemployment insurance unexpectedly increased last week, a sign that the economic recovery will be uneven as the labor market struggles to rebound. Initial jobless applications rose by 22,000 to 496,000 in the week ended Feb. 20, Labor Department figures showed in Washington. (Bloomberg)
- European confidence in the economic outlook unexpectedly worsened in February after the euro region's recovery almost stalled in the fourth quarter. An index of executive and consumer sentiment in the 16 nations using the euro slipped to 95.9 from a revised 96 in January, the European Commission in Brussels said. (Bloomberg)
- Orders for US durable goods excluding transportation unexpectedly declined in January as demand for business equipment weakened. Orders unexpectedly fell 0.6%, the biggest drop since August, figures from the Commerce Department showed in Washington. (Bloomberg)

Corporate Announcements – India:

- Ranbaxy Laboratories** reported a consolidated PAT of Rs. 2.62 bn for the quarter ended on December 31, 2009. The Company had registered a loss of Rs. 6.79 bn in the same quarter a year ago. (BS)
- Sterlite Technologies** has received shareholders' nod for issue of bonus shares and sub-division of shares. The company will issue bonus shares in the ratio of 1:1. (BS)
- Tata Power** posted an 81.67% decline in consolidated net profit which stood at Rs. 925 mn for the quarter ended December 31, 2009 as against Rs. 5.05 bn posted in the same quarter a year ago. (BS)

Economic and Political Headlines:

- India's infrastructure sector output grew 9.4% in January from a year earlier, higher than an upwardly revised annual growth of 6.4% in December, government data showed on Thursday. (BS)
- Food inflation fell to 17.58% for the week ended February 13 as prices of pulses and vegetables eased during the week. While prices of pulses fell by 1% over the week, vegetables became cheaper by 5.7%. Potato prices were up 30.40% year-on-year during the week against an annual rise of 57.67% in the week ending February 6. (BS)

BSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
Ace India	ANITA GUPTA	BUY	160,000	11.00
Ace India	PK GOYAL	BUY	50,000	11.00
Ace India	SUSHIL AGGARWAL	BUY	134,716	11.00
Ace India	UMA GOEL	BUY	100,000	11.00
Ace India	VED PRAKASHNA RULA	SELL	495,000	11.08
ACI Infocom	ALOK GUPTA	SELL	300,000	24.84
ACI Infocom	EXIM SCRIPS DEALERS PVT LTD	BUY	135,506	27.13
ACI Infocom	JINAY INVESTMENT CO PVT LTD	BUY	50,000	26.88
ACI Infocom	JINENDRA FISCAL PVT LTD	BUY	60,000	27.10
ACI Infocom	MESSRS SHREEKANT PHUMBHRA	BUY	100,000	27.09
ACI Infocom	PARESH GOPANI	SELL	133,555	24.78
ACI Infocom	SHREE HARIVANSH SEC PVT LTD	BUY	110,000	27.09
Bampsl Sec	ANJU GUPTA	BUY	500,000	1.41
Bampsl Sec	GIRRAJ PRASAD GUPTA	BUY	600,000	1.42
Bampsl Sec	KAUSHALYA GARG	SELL	929,429	1.41
Bampsl Sec	NAVAL KISHORE GUPTA	SELL	700,000	1.42
Bampsl Sec	PRAKASH CHAND GUPTA	BUY	728,560	1.41
Bampsl Sec	PRAKASH CHAND GUPTA	SELL	463,725	1.37
Bampsl Sec	SUNIL KUMAR GUPTA	BUY	600,000	1.40
Birla Shloka	TALISMAN SECUTIRIES PVT LTD	BUY	111,199	53.39
EMMBI POLY	VASANTI SHARE BROKAERS LTD	BUY	123,657	30.12
EMMBI POLY	VASANTI SHARE BROKAERS LTD	SELL	128,157	30.12
Empower Inds	HITESH SHASHIKANT JHAVERI	SELL	56,201	45.35
Empower Inds	JASMIN SUSILKUMAR BAJORIYA	BUY	50,000	45.35
Exelon Infra	ANGEL INFIN PRIVATE LIMITED	BUY	73,306	20.20
Fame India	MONEY MATTERS ADVISORY SERVICES LIMITED	SELL	355,847	83.91
Fame India	RELIANCE CAPITAL PARTNERS	BUY	274,682	83.11
G Tech Info	VIJAY KUMAR JASRASARIA GHEVAR INVESTMENTS AND TRADING COMPANY PRIVATE LIMITED	SELL	500,000	4.85
Gokak Textiles	LIMITED	SELL	95,000	45.00
Gokak Textiles	INDIA DISCOVERY FUND LIMITED	BUY	95,033	45.00
Jai Mata Glass	KOMAL MAHENDRU	SELL	80,000	3.02
KAY Power	BAMPSL SECURITIES LTD	BUY	251,252	17.42
KAY Power	BAMPSL SECURITIES LTD	SELL	349,061	17.18
KAY Power	GIRRAJ PRASAD GUPTA	SELL	103,000	17.18
KAY Power	KAILASH CHAND GUPTA	BUY	55,790	17.17
KAY Power	KAILASH CHAND GUPTA	SELL	58,879	17.79
KAY Power	NAVAL KISHORE GUPTA	BUY	263,550	17.17
KAY Power	SUNDERDASS AGARWAL	SELL	144,800	17.17
KAY Power	SUNIL KUMAR GUPTA	BUY	77,420	17.51

Khandwala Sec	FALCON BROKERAGE STOCK/PMS PVT LTD	BUY	100,000	24.44
Khandwala Sec	S C DOSHI HUF	SELL	98,785	24.45
Koffee Break	JASWANT DIPCHAND MEHTA	SELL	400,000	1.70
Koffee Break	SUCHIT KUMAR VIJAY SHANKAR GOUND	BUY	1,358,786	1.68
Koffee Break	SUCHIT KUMAR VIJAY SHANKAR GOUND	SELL	756,633	1.60
Niraj Cement	RAJARAM VISHWAS PATIL	BUY	179,586	54.08
Niraj Cement	RAJARAM VISHWAS PATIL	SELL	153,483	52.32
Odyssey Corp	EFORCE INDIA PRIVATE LIMITED	SELL	50,000	63.25
Omkar Overseas	RESHMA NAYANKUMAR SHAH	SELL	50,000	56.73
Omkar Overseas	SHRENI SHARES PRIVATE LTD	BUY	57,000	56.50
Panchsheel Org	SHAILESHBHAJ CHATURBHAJ PATEL	BUY	52,870	37.57
Rama Pulp	MAHIPAT IWDARMAL MEHTA	BUY	165,592	31.50
Rama Pulp	MAHIPAT IWDARMAL MEHTA	SELL	149,527	31.45
Rama Pulp	MUNISH HANDA	BUY	58,387	31.41
Rama Pulp	MUNISH HANDA	SELL	55,676	31.46
Sanjivani Par	BHUSHAN SARKAR	SELL	134,595	60.57
Sanjivani Par	BP FINTRADE PRIVATE LIMITED	BUY	59,861	60.86
Sanjivani Par	BP FINTRADE PRIVATE LIMITED	SELL	56,861	60.97
Sanjivani Par	DRISHTI SHARES	BUY	61,400	61.02
Sanjivani Par	SUNIL SHAH	BUY	55,000	59.80
Shree Ashtavina	AVR OVERSEAS PVT LTD	SELL	1,100,000	14.99
Shree Ashtavina	TRANS FINANCIAL RESOURCES LIMITED	BUY	839,538	14.97
Solectron EMS	MANJULA JAYNTILAL JAIN	SELL	59,000	56.04
Southern Onlin	ARPIT SHARE BROKERS PRIVATE LIMITED	BUY	300,000	21.25
Southern Onlin	SAMRIDHI SHARE AND STOCK BROKER LIMITED	BUY	200,000	21.25
Southern Onlin	SRIJAN TIE- UP PRIVATE LIMITED	SELL	500,000	21.25
Unisys Soft	RAJ KUMAR SHARMA	SELL	534,761	20.72
Vikas Globalone	JAI GANESH CHIT FUND PVT LTD	BUY	107,396	27.80
Vikas Globalone	SUPER PLASTIC COATS	SELL	102,396	27.80

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

NSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
BAJAJHIND	BARCLAYS CAPITAL MAURITIUS LIMITED	SELL	1,290,000	150.76
EMMBI	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	577,262	29.96
EMMBI	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	SELL	582,262	29.90
EMMBI	SACHIN GUPTA	BUY	86,861	30.06
EMMBI	SACHIN GUPTA	SELL	91,861	30.15
FAME	RELIANCE CAPITAL PARTNERS	BUY	319,879	83.11
FSL	SOCIETE GENERALE	SELL	4,959,000	26.59
ORCHIDCHEM	MORAGAN STANLEY DEAN WITTER	SELL	426,300	162.98
SYNCOM	AUM SECURITIES PRIVATE LTD.	BUY	180,250	94.19
SYNCOM	AUM SECURITIES PRIVATE LTD.	SELL	180,250	92.67
SYNCOM	PINAC STOCK BROKERS PVT LTD	BUY	202,014	93.28
SYNCOM	PINAC STOCK BROKERS PVT LTD	SELL	192,051	93.17
SYNCOM	VORA JINALBEN BHAVIKBHAJ	SELL	104,600	93.29
TATACHEM	DEUTSCHE BANK AG	SELL	1,383,270	277.74
TATACHEM	SWISS FINANCE CORPORATION (MAURITIUS) LIMITED	SELL	1,288,580	279.41

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