

DAILY MARKET REVIEW

MARKET SUMMARY

Bad IIP numbers, higher inflation and rising crude made the market tumble on the last trading day of the week. Sensex shed 456 points to close at 13469 while Nifty closed at 4049, down 113 points. May Index of Industrial Production (IIP) data showed a growth of just 3.8% as against 10.6% in same period of last year. Market expectation was of around 6.7%. May manufacturing growth dipped to 3.9% from 11.3% yoy while Capital good at 2.5% v/s 22.4%. Inflation for the week ended June 28 stood at 11.89% as against 11.63% for earlier week. Crude also bounced back and touched an all time high of \$145.98 on NYMEX while writing this report.

Earlier in the day tech bellwether Infosys announced it's Q1 results. Net profit stood at 1302 cr., up 4.2% sequentially against expectation of Rs. 1273 cr. The company also upped full year EPS guidance from Rs. 92.32-93.92 to 99.34-101.06. However, operating profit margin declined by 203 bps from 32.5% to 30.47%. It also kept it's dollar revenue guidance unchanged. The stock closed down 7% at Rs. 1676. All the sectoral indices ended in red with IT and Capital Goods indices losing the most, 6.7% and 5% respectively. JP Associate and TCS were top losers in the sensex, down 8.5% and 8% respectively. BSE advance-decline ratio stood at 1:1.66.

MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
NIFTY	4166.00	4215.50	4014.45	4049.00	-113.20	-2.72
SENSEX	14032.06	14066.36	13351.34	13469.85	-456.39	-3.28
MIDCAP	5484.48	5526.82	5348.27	5365.34	-109.86	-2.01
SMLCAP	6823.90	6904.54	6695.98	6713.66	-95.58	-1.40
BSE-100	7324.62	7339.28	6986.85	7050.65	-219.22	-3.02
BSE-200	1711.06	1714.00	1635.33	1649.10	-49.64	-2.92
BSE-500	5414.94	5424.68	5186.38	5226.85	-151.05	-2.81

SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
IT	4284.58	4295.49	3867.41	3907.63	-281.77	-6.73
CG	11397.80	11434.18	10736.69	10774.38	-565.67	-4.99
TECK	3195.61	3201.24	2967.66	3001.11	-136.42	-4.35
POWER	2465.85	2471.59	2323.87	2344.06	-104.72	-4.28
OIL&GAS	9126.19	9163.69	8804.08	8886.28	-193.31	-2.13
FMCG	2032.26	2050.23	1971.54	1987.28	-42.48	-2.09
BANKEK	6226.77	6226.77	5971.28	6044.76	-120.49	-1.95
METAL	13077.19	13186.15	12571.62	12711.71	-247.46	-1.91
PSU	6124.79	6187.52	5903.14	5967.71	-106.11	-1.75
CD	3663.19	3698.00	3571.67	3589.21	-61.31	-1.68
REALTY	4919.91	4976.70	4729.50	4800.09	-75.93	-1.56
AUTO	3577.29	3600.20	3502.77	3529.44	-36.23	-1.02
HC	4161.79	4183.80	4109.09	4129.94	-24.78	-0.60

SENSEX MOVERS

TOP GAINER

Company	Price	Gain %
AMBUJ CEM	80.50	1.90
HDFC BANK	1067.45	1.21
HINDALCO	155.20	1.01
BHARTI	745.00	0.44
TATA MOTORS	399.65	0.04

TOP LOSERS

Company	Price	Loss %
JAIPRAK ASSO	156.50	-8.48
TCS	799.20	-8.03
SATYAM	444.45	-7.19
INFOSYS	1676.45	-7.18
L&T	2357.20	-6.89

GROUP A MOVERS

TOP GAINER

Company	Price	Gain %
MMTC	24776.25	9.25
NALCO	381.55	5.91
DABUR INDIA	94.30	4.49
JAI CORP	372.00	4.30
BRIGADE	116.50	3.88

TOP LOSERS

Company	Price	Loss %
DECCAN AVIA.	71.10	-9.77
IFCI	39.60	-9.49
NAG. CONST.	130.85	-9.20
I-FLEX	1333.20	-9.11
J P ASSOCIATES	156.50	-8.48

TOP TRADED SENSEX STOCKS

Company	Price
INFOSYS	358.48
RELIANCE	279.34
REL INF	176.79
L&T	147.61
HDFC	129.64

TURNOVERS (RS CR)

Segment	Today	Yesterday
BSE Cash	5386.39	4825.80
NSE Cash	12269.35	11413.15
NSE F&O	50149.82	35645.89
Total	67805.56	51884.84

MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
995	1655	61	2711

CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	0	110	13	25	4	24	176
Lower Circuit	0	74	10	26	4	22	136
Total	0	184	23	51	8	46	312

BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
11-Jul	AMARA RAJA BATT	FRANKLIN HIGH GROWTH CO FUND	BUY	1120833	132.00	1.97
11-Jul	AMARA RAJA BATT	TEMPELTON MUTUAL FUND	SELL	2690000	132.00	4.72
11-Jul	AMARA RAJA BATT	FRANKLIN INDIA FLEXI CAP FUND	BUY	1569167	132.00	2.76
11-Jul	BIHAR TUBES	APL INFRASTRUCTURE PRIVATE LIM	SELL	145000	159.35	1.09
11-Jul	BIHAR TUBES	ELARA INDIA OPPORTUNITIES FUND	BUY	1500000	159.35	11.31
11-Jul	BIHAR TUBES	SAMEER GUPTA	SELL	183417	159.35	1.38
11-Jul	BIHAR TUBES	SANJAY GUPTA	SELL	509610	159.35	3.84
11-Jul	BIHAR TUBES	VANDANA GUPTA	SELL	245400	159.35	1.85
11-Jul	BIHAR TUBES	VINAY GUPTA	SELL	190560	159.35	1.44
11-Jul	GAMMON INDIA	JP MORGAN FLEMING ASSET MGMT	SELL	3000000	220.00	3.43
11-Jul	GAMMON INDIA	JP MORGAN FLEMING ASSET MGMT	SELL	500000	220.00	0.57
11-Jul	GAMMON INDIA	WARHOL LTD	BUY	3884000	220.00	4.44
11-Jul	LIME CHEMICALS	DUKE SPECIAL OPP. FUND LLC	SELL	20000	5.61	0.61

BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
11-Jul	ASIAN HOTELS	MOSAIC INTER TRADE LIMITED	SELL	161158	492.00	0.71
11-Jul	ASIAN HOTELS	SHIV KUMAR JATIA	BUY	161158	492.00	0.71
11-Jul	IOL NETCOM	SHREE DHOOT TRADING LIMITED	BUY	177781	67.14	0.65
11-Jul	PRAJAY ENGG.	CITIGROUP GLOBAL MKT MAURI	BUY	200000	74.20	0.55
11-Jul	SKF INDIA	CITIGROUP GLOBAL MKT MAURI	SELL	1766995	217.00	3.35
11-Jul	SKF INDIA	HQ FONDER SVERIGE AB HQ	BUY	1655662	217.00	3.14

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