

## MORNING BREAKFAST

### Market snapshot

| Indices       | Closing | Previous day | % change |
|---------------|---------|--------------|----------|
| BSE Sensex    | 15769.9 | 15688.5      | 0.5      |
| S&P CNX Nifty | 4680.9  | 4659.4       | 0.5      |

### Turnover at BSE, NSE and Derivatives

| Value traded (Rs. in cr.) | Closing | Previous day | % change |
|---------------------------|---------|--------------|----------|
| Cash NSE                  | 19521.0 | 17889.2      | 9.1      |
| Cash BSE                  | 6917.6  | 6339.9       | 9.1      |
| Derivative                | 78077.7 | 88341.3      | -11.6    |

### FII and Mutual Fund inflow

| Net inflow (Rs. In cr.)       |        | MTD    |
|-------------------------------|--------|--------|
| <b>FII (as on 26.08.2009)</b> |        |        |
| Equity                        | -53.6  | 1431.2 |
| Debt                          | -345.4 | 2453.2 |
| <b>MF (as on 25.08.2009)</b>  |        |        |
| Equity                        | 423.0  | 491.8  |
| Debt                          | 79.1   | 8586.7 |

### Advance and Declines

| Advances / Declines (BSE) | A   | B    | S    | Total |
|---------------------------|-----|------|------|-------|
| Advances                  | 135 | 1293 | 323  | 1943  |
| Declines                  | 70  | 532  | 123  | 851   |
| Unchanged                 | 0   | 48   | 8    | 73    |
| Advance: Decline ratio    |     |      | 2.28 |       |

### Money markets

| Money Markets           | Closing     |
|-------------------------|-------------|
| Call Money Markets      | 2.25%-4.3%  |
| 91 day T-Bill Rate      | 4.58%       |
| 182 day T-Bill Rate     | 4.64%       |
| 365 day T-Bill Rate     | 4.51%       |
| 10 year Govt. Bond Rate | 7.39%-7.65% |

### Policy rates

|                   |       |
|-------------------|-------|
| Repo rate         | 4.75% |
| Reverse Repo rate | 3.25% |
| Bank rate         | 6.00% |

**Lending and borrowing rates**

|                   |               |
|-------------------|---------------|
| Savings bank rate | 3.50%         |
| PLR               | 12.75%-13.25% |
| Deposit rate      | 7.50%-9.60%   |

**Reserve ratios**

|                                 |       |
|---------------------------------|-------|
| Cash reserve ratio (CRR)        | 5.0%  |
| Statutory Liquidity ratio (SLR) | 24.0% |

**Currency rates**

| Forex                | Closing | Previous day | % change |
|----------------------|---------|--------------|----------|
| Rs / USD             | 48.8    | 48.8         | 0.0      |
| Rs. / Euro           | 69.9    | 69.7         | 0.3      |
| Rs. / Pound Sterling | 79.8    | 80.0         | -0.3     |

**Top Gainers in Nifty**

| Name of company      | Last traded price | Previous close | % Change | Total traded Qty (Rs. in mn.) |
|----------------------|-------------------|----------------|----------|-------------------------------|
| INFOSYS TECHNOLOGIES | 2179.7            | 2095.0         | 4.0      | 1.8                           |
| STERLITE             | 679.8             | 654.0          | 4.0      | 3.8                           |
| TCS                  | 548.5             | 528.3          | 3.8      | 4.4                           |
| WIPRO                | 557.0             | 543.8          | 2.4      | 1.7                           |
| TATA COMMUNICATIONS  | 519.7             | 508.0          | 2.3      | 0.4                           |

**Top Losers in Nifty**

| Name of company    | Last traded price | Previous close | % Change | Total traded Qty (Rs. in mn.) |
|--------------------|-------------------|----------------|----------|-------------------------------|
| JINDAL STEEL       | 3175.1            | 3266.1         | -2.8     | 0.8                           |
| RANBAXY            | 335.4             | 343.7          | -2.4     | 2.2                           |
| HINDUSTAN UNILEVER | 263.1             | 269.5          | -2.4     | 4.0                           |
| HDFC BANK          | 1460.6            | 1487.0         | -1.8     | 0.7                           |
| HCL TECHNOLOGIES   | 301.8             | 307.2          | -1.8     | 3.3                           |

## Economic News

- Inflation rose to -0.95 percent for the week ended August 15 from -1.53 percent in the previous week on the back of rising food prices - BS.
- Keen on expediting capacity expansion of the major ports in the country, the government has awarded a Rs.479-crore project for construction of a coal berth at the Paradip port. The project has been given to a consortium led by Essar Shipping Ports and Logistics on 31 per cent revenue sharing basis – BS.

## Corporate News

- Thermax Ltd has formed power equipment and services JV for India with US firm SPX Corp. It will provide air pollution control systems for power plants above 300 MW and energy efficiency equipment. Thermax will hold 51 per cent in the JV and SPX the rest - ET.
- Cipla plans to raise Rs.1500 crores either by issuing foreign currency convertible bonds or through global depository receipts (GDRs) to clear its debt as well as finance its capital expenditure - ET.
- The country's second-largest software exporter, Infosys Technologies, today said it has bagged a five-year outsourcing and support agreement from BP, one of the world's major oil and gas companies - BS.
- Software exporter HCL Technologies has partnered New Zealand-based Optimisation for providing innovative and flexible software solutions - BS.
- TCS, a leading IT services services consulting, business solutions and outsourcing firm announced that it has been selected as a strategic vendor for BP, one of the leading oil and gas companies with operations in more than 100 countries – BS.
- Within less than a year, the country's largest automaker, Tata Motors, has come to the public for the second time to raise about Rs.1500 crores via fixed deposit schemes, offering up to 9.88 per cent annual interest for a three-year deposit - BS.
- Cairn India and its partner Oil and Natural Gas Corp (ONGC), which will this weekend start oil production from their prolific Rajasthan fields, will invest \$1.5-1.8 billion more in the desert block over the next two years – BS.
- Steel maker Prakash Industries's shareholders have approved to raise Rs.500 crores by various fund raising routes from domestic and international markets - BS.
- State-run NTPC signed a Power Purchase Agreement (PPA) with Chhattisgarh State Power Distribution Company Ltd for supply of electricity - BS.

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