

# DAILY MARKET REVIEW

## MARKET SUMMARY

After 5 days' meteoric rise, today was the day of profit taking on dalal street. Sensex lost 353 points from morning high to close at 14777, down 1.1% compared to yesterday. Nifty lost 43 points to close at 4433. Telecom major Bharti Airtel announced it's Q1 results in the morning. Net profit for the quarter ended June 2008 stood at Rs. 2167 cr., up 17% yoy against expectation of Rs. 1919 cr. ACC posted a net profit of Rs. 255 cr, down 27% yoy against expectation of Rs. 288 cr. Inflation number for the week ended July 12 will be announced in the evening around 6 pm and is likely to be around 12% as against 11.91% in the previous week. Index heavyweight Reliance is also coming out with its quarterly result today. The results were not out till writing this report.

Metal index was the top loser among sectoral indices, down 2.9% followed by IT and Tech indices, which lost 2.8% and 2.5% respectively. Oil and Gas index gained 1.5% in today's trade followed by Realty index, which gained 0.6%. ONGC, DLF and Reliance were top sensex gainers, up 3.2%, 2.3% and 1.8% respectively. On the other hand TCS, Tata steel and ACC were down 6.5%, 5.4% and 5.1% respectively. PSU stocks viz. HOCL, HMT, RCF, Engineers India etc. flared up in today's trade and gained anywhere between 14% to 20%. BSE Advance-decline ratio stood at 1:1.16.

## MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
<b>NIFTY</b>	4476.20	4539.45	4385.85	4433.55	-43.25	-0.97
<b>SENSEX</b>	15082.37	15130.09	14608.05	14777.01	-165.27	-1.11
<b>MIDCAP</b>	5644.07	5723.23	5544.51	5580.90	-35.04	-0.62
<b>SMLCAP</b>	6836.32	6924.37	6771.88	6796.11	-16.53	-0.24
<b>BSE-100</b>	7832.72	7880.04	7605.20	7682.46	-77.86	-1.00
<b>BSE-200</b>	1823.80	1836.17	1772.91	1790.31	-17.46	-0.97
<b>BSE-500</b>	5740.60	5783.45	5589.43	5641.17	-51.08	-0.90

## SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
<b>METAL</b>	13256.54	13331.41	12554.74	12696.25	-374.27	-2.86
<b>IT</b>	3729.15	3745.49	3532.94	3630.04	-103.47	-2.77
<b>TECK</b>	3095.28	3100.58	2957.97	2986.03	-76.16	-2.49
<b>CD</b>	3758.31	3806.66	3623.99	3649.90	-87.35	-2.34
<b>POWER</b>	2749.72	2753.25	2628.35	2654.45	-52.66	-1.95
<b>CG</b>	12511.33	12526.95	11932.72	12119.16	-220.61	-1.79
<b>BANKEKX</b>	7397.76	7467.85	7017.28	7163.48	-128.02	-1.76
<b>FMCG</b>	2143.40	2159.56	2111.06	2119.09	-22.75	-1.06
<b>HC</b>	4200.45	4231.64	4154.00	4183.61	-9.33	-0.22
<b>PSU</b>	6835.42	6910.28	6659.19	6728.21	0.47	0.01
<b>AUTO</b>	3744.96	3823.32	3744.82	3771.16	2.98	0.08
<b>REALTY</b>	5262.17	5380.57	5132.01	5230.15	30.88	0.59
<b>OIL&amp;GAS</b>	9963.61	10142.65	9905.04	10013.40	148.81	1.51

## SENSEX MOVERS

### TOP GAINER

Company	Price	Gain %
ONGC	1027.25	3.25
DLF	507.20	2.35
RELIANCE	2306.55	1.81
MARUTI	617.90	1.80
REL INF	1027.00	1.23

### TOP LOSERS

Company	Price	Loss %
TCS	802.75	-6.49
TATA STEEL	631.00	-5.40
ACC	560.75	-5.13
RCOM	501.50	-4.52
SBI	1478.35	-4.24

## GROUP A MOVERS

### TOP GAINER

Company	Price	Gain %
HMT	72.50	19.34
RCF	65.05	17.10
EIL	601.95	14.43
UNI.BREW(HOL)	320.05	14.34
PHOENIX MILLS	157.80	14.06

### TOP LOSERS

Company	Price	Loss %
MAYTAS INFRA	442.95	-10.38
TATA POWER	1049.30	-6.91
SH. PRECOAT. STL	94.00	-6.61
TCS	802.75	-6.49
TECH MAHINDRA	706.45	-6.23

## TOP TRADED SENSEX STOCKS

Company	Turnover (Rs Cr)
RELIANCE	283.70
REL INF	218.09
RCOM	174.45
BHARTI	171.92
L&T	163.09

## TURNOVERS (Rs CR)

Segment	Today	Yesterday
BSE Cash	7445.07	7459.00
NSE Cash	17670.09	20418.14
NSE F&O	58129.42	68010.68
<b>Total</b>	<b>83244.58</b>	<b>95887.82</b>

## MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
1258	1458	67	2783

## CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	2	168	17	41	1	43	272
Lower Circuit	0	50	6	13	2	25	96
<b>Total</b>	<b>2</b>	<b>218</b>	<b>23</b>	<b>54</b>	<b>3</b>	<b>68</b>	<b>368</b>

## BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
24-Jul	ARSHIYA INTERNAT	THE PRUDENTIAL ASSURANCE	SELL	300000	170.00	0.53
24-Jul	ARSHIYA INTERNAT	WARDFERRY MANAGEMENT LTD	BUY	299707	170.00	0.53
24-Jul	CHAMPAGNE INDAGE	CITIGROUP GLOBAL MARKETS	SELL	281671	408.03	1.84
24-Jul	GREMACH INFRA	SOPHIA GROWTH SOMERSET	SELL	200000	90.30	1.31
24-Jul	LOGIX MICROSYS.	CITIGROUP GLOBAL MKTS.	SELL	103000	110.06	0.85
24-Jul	MOUNT EVEREST	ARISAIG PARTNERS ASIA PTE	BUY	271464	142.55	0.80
24-Jul	MOUNT EVEREST	DSP MERRILL LYNCH LIMITED	SELL	272662	142.55	0.80
24-Jul	NIIT TECH.	RELIANCE MUTUAL FUND	SELL	394300	111.55	0.67
24-Jul	SB & T INTL.	DEUTSCHE SECURITIES MAURI	SELL	138700	13.67	0.82
24-Jul	STONE INDIA	MERRILL LYNCH CAPITAL MKT	SELL	40486	52.40	0.53
24-Jul	ZODIAC CLOTH. CO	M3 INVESTMENT P LIMITED	BUY	308000	400.00	3.67
24-Jul	ZODIAC CLOTH. CO	MERRILL LYNCH CAPITAL MKT	SELL	308868	400.00	3.68
24-Jul	USHER AGRO	SOMEREST EMERGING OPPO	SELL	150518	125.00	0.84
24-Jul	USHER AGRO	SOPHIA GROWTH	SELL	849482	125.02	4.72

## BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
25-Jul	CHAMBAL FERT.	CITIGROUP GLOBAL MARKETS MAURI	SELL	2973000	70.8	0.7
25-Jul	CHAMBAL FERT.	DSP MERILL LYNCH MUTUAL FUND	BUY	2094766	71.3	0.5
25-Jul	LOGIX MICROSYS.	CITIGROUP GLOBAL MARKETS MAURI	SELL	312177	110.0	2.6
25-Jul	NIIT TECH.	RELIANCE CAPITAL TRUSTEE CO.LTD.	SELL	505700	111.8	0.9
25-Jul	NUCLEUS SOFTWARE	FIDELITY MUTUAL FUND	BUY	245983	175.0	0.8
25-Jul	SB & T INTL.	DEUTSCHE SECURITIES MAURI	SELL	247000	13.6	1.5

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