

DAILY MARKET REVIEW

MARKET SUMMARY

Negative global cues to start with and aggressive rate hikes by RBI later during the day made the market tumble in today's trade. Sensex shed 557 points to close at 13791, while Nifty closed at 4189, down 142 points. In an unexpected move, RBI, in it's busy season credit policy, hiked Repo rate by 50 bps and CRR by 25 bps. Repo rate has now reached 9%, the level last seen in October, 200. While CRR, after today's hike will also touch 9%, for the first time since November 1999. According to RBI, bringing down inflation is the highest priority, which it wants to see at 7% by March 2009 and eventually at 5%. Earlier, weakness in global markets also casted its shadow on opening of our market, with sensex opening with a gap down of 264 points.

As expected, rate sensitive sectors, viz. Bankex and Realty took the biggest hit in today's trade, down 8.3% and 5.5% respectively. FMCG index, helped by Hindustan Uniliver, which gained 3% in today's trade, could manage to finish in the green territory. HDFC Bank and ICICI Bank were top sensex losers, down 8.7% and 8.4% respectively. BSE advance-decline ratio stood at 1:1.74.

MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
NIFTY	4332.20	4332.20	4159.15	4189.85	-142.25	-3.28
SENSEX	14085.53	14153.12	13727.14	13791.54	-557.57	-3.89
MIDCAP	5612.05	5612.05	5474.86	5488.58	-142.20	-2.53
SMLCAP	6905.69	6940.06	6809.48	6831.01	-81.97	-1.19
BSE-100	7369.24	7393.66	7169.24	7202.35	-289.18	-3.86
BSE-200	1727.03	1732.06	1680.14	1687.11	-66.38	-3.79
BSE-500	5465.23	5479.87	5321.45	5342.36	-199.11	-3.59

SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
BANKEX	6548.59	6627.33	6173.43	6199.60	-562.22	-8.31
REALTY	4938.34	5024.04	4728.50	4797.71	-281.41	-5.54
CG	11712.92	11756.89	11276.45	11320.60	-586.21	-4.92
POWER	2529.67	2552.43	2463.56	2473.81	-106.00	-4.11
AUTO	3685.23	3685.23	3551.70	3573.21	-150.59	-4.04
OIL&GAS	9536.96	9563.62	9273.66	9303.57	-349.33	-3.62
PSU	6714.53	6714.53	6469.78	6514.79	-209.63	-3.12
METAL	12201.62	12333.73	12016.61	12130.36	-236.36	-1.91
HC	4189.29	4189.29	4115.98	4133.14	-69.53	-1.65
TECK	2947.71	2956.82	2903.72	2934.35	-47.53	-1.59
CD	3657.29	3696.83	3580.17	3621.63	-39.09	-1.07
IT	3578.56	3607.98	3548.69	3588.57	-18.24	-0.51
FMCG	2095.63	2144.91	2091.65	2136.28	1.17	0.05

SENSEX MOVERS

TOP GAINER

Company	Price	Gain %
HUL	237.50	2.86
STERLITE IN	592.05	1.68
TCS	808.25	0.27
INFOSYS	1539.90	0.06

TOP LOSERS

Company	Price	Loss %
HDFC BANK	1028.90	-8.71
ICICI BANK	607.40	-8.45
REL INF	908.15	-7.99
MARUTI	567.65	-7.03
SBI	1321.00	-6.84

GROUP A MOVERS

TOP GAINER

Company	Price	Gain %
NALCO	443.90	3.53
HIND.ZINC	551.30	3.38
HUL	237.50	2.86
SESA GOA	3233.05	2.02
STERLITE IND	592.05	1.68

TOP LOSERS

Company	Price	Loss %
BHARAT ELECTRON	977.05	-16.28
SUN TV	231.60	-14.63
INDIAN BANK	91.35	-13.94
BOI	257.80	-12.57
UTI BANK	620.10	-11.06

TOP TRADED SENSEX STOCKS

Company	Turnover (Rs Cr)
L & T	223.37
RELIANCE	222.27
ICICI BANK	193.96
SBI	148.01
REL INF	124.48

TURNOVERS (Rs CR)

Segment	Today	Yesterday
BSE Cash	5103.03	4632.42
NSE Cash	12190.70	11097.96
NSE F&O	64804.21	45000.90
Total	82097.94	60731.28

MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
963	1672	72	2707

CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	0	93	10	35	4	26	168
Lower Circuit	1	68	7	19	1	22	118
Total	1	161	17	54	5	48	286

BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
29-Jul	ANKUR DRUGS	MORGAN STANLEY MAURI. CO LTD	BUY	50000	234.22	0.28
29-Jul	BIHAR TUBES	APL INFRASTRUCTURE PRIVATE LIM	BUY	476487	162.44	3.59
29-Jul	BIHAR TUBES	SECUROCROP SECURITIES INDIA P	SELL	460000	162.49	3.47
29-Jul	GREMACH INFRA	SOPHIA GROWTH SOMERSET FUND	SELL	100000	88.00	0.66
29-Jul	INFOTECH ENTERPR	COURAGE CAP MGT LLC SSIF	BUY	463817	205.00	0.89
29-Jul	INFOTECH ENTERPR	CITIGROUP GLOBAL MARKETS MAURI	SELL	463817	205.00	0.89
29-Jul	SOUTH IND.BANK	COURAGE CAP MGT LLC SSIF	BUY	629039	107.00	0.70
29-Jul	SOUTH IND.BANK	CITIGROUP GLOBAL MARKETS MAURI	SELL	629039	107.00	0.70

BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
29-Jul	ANSAL PROPERTIES	MERRILL LYNCH CAPITAL MARKETS	BUY	600072	89.97	0.53
29-Jul	IFCI	AMBIT SECURITIES BROKING P LTD	BUY	4024305	42.81	0.53
29-Jul	IFCI	CLEAN FINANCE & INVESTMENT LTD	BUY	6647150	42.95	0.87
29-Jul	IFCI	GOLDMAN SACHS INV MAURITIUS	BUY	8030000	42.71	1.05
29-Jul	IFCI	AMBIT SECURITIES BROKING P LTD	SELL	4250975	42.79	0.56
29-Jul	IFCI	CLEAN FINANCE & INVESTMENT LTD	SELL	6653350	42.97	0.87
29-Jul	SHREE ASHTAVINA	SARANG RAKESH WADHAWAN	BUY	55500	539.98	0.55
29-Jul	SHREE ASHTAVINA	MAVI INVESTMENT FUND LTD.	SELL	55000	539.99	0.55

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