

DAILY MARKET REVIEW

MARKET SUMMARY

An unexpected 25 bps hike in discount rate by Fed yesterday spooked the markets and all the Asian markets closed in red. Sensex lost 136 points to close at 16191 while Nifty finished at 4845, down 43 points. BSE Mid-cap and Small-cap indices lost 1.4% and 1.6% respectively. Realty and Metal stocks were down the most. Week on Week, Sensex and Nifty have closed almost flat, gaining just 0.24% and 0.4% respectively. Among the sectoral indices, Realty index plunged 5.7% week on week, followed by Oil index, down 1.6%. The top gainers were Healthcare index and Bankex, up 1.9% and 1.6% respectively. European markets were down by about half a percent, with bank stocks losing the most. US stock indices futures were down about half a percent ahead of the Retail sales and Consumer Price Index data.

Barring BSE Healthcare index that gained 0.07% in today's trade all other sectoral indices finished in red with Realty and Metal indices losing the most, down 3.4% and 2.5% respectively. JP Associate and DLF plunged 4.4% and 4.1% respectively, becoming the top losers among the Sensex stocks while HDFC Bank and Maruti gained the most, up 0.9% and 0.6% respectively. BSE advance-decline ratio stood at 1:2.5.

MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
NIFTY	4887.30	4887.30	4805.55	4844.90	-42.85	-0.88
SENSEX	16256.53	16301.94	16074.58	16191.63	-136.21	-0.83
MIDCAP	6508.52	6508.52	6401.12	6432.36	-91.86	-1.41
SMLCAP	8323.12	8323.12	8182.01	8204.57	-130.54	-1.57
BSE-100	8644.35	8691.02	8574.13	8635.42	-78.80	-0.90
BSE-200	2051.64	2061.10	2034.31	2048.00	-20.01	-0.97
BSE-500	6475.26	6499.02	6418.13	6458.09	-65.06	-1.00
BSE IPO	1930.41	1938.15	1913.82	1917.85	-21.31	-1.10

SECTORAL INDICES

Indices	Open	High	Low	Close	Change (pts)	Change (%)
REALTY	3234.67	3254.21	3159.78	3189.77	-111.19	-3.37
METAL	15970.83	15982.87	15670.45	15806.15	-403.66	-2.49
CD	4105.70	4143.43	4068.79	4078.69	-59.64	-1.44
POWER	2984.73	2984.73	2942.66	2960.64	-34.66	-1.16
AUTO	7022.32	7043.09	6938.84	6998.24	-70.10	-0.99
PSU	9226.95	9311.60	9185.41	9222.61	-76.54	-0.82
BANKEX	9532.27	9599.05	9454.90	9560.25	-76.16	-0.79
OIL&GAS	9610.84	9729.32	9604.36	9655.30	-70.53	-0.73
TECK	3142.40	3166.67	3133.02	3142.79	-20.87	-0.66
CG	13131.99	13271.25	13030.60	13143.87	-75.70	-0.57
IT	5064.98	5115.18	5064.97	5081.67	-17.79	-0.35
FMCG	2738.28	2771.55	2736.32	2753.33	-4.68	-0.17
HC	4860.11	4887.86	4818.86	4862.93	3.49	0.07

SENSEX MOVERS

TOP GAINER

Company	Price	Gain %
HDFC BANK	1699.55	0.94
MARUTI SUZ	1370.30	0.63
ONGC	1105.65	0.59
HDFC	2487.70	0.51

TOP LOSERS

Company	Price	Loss %
JP ASSOCIATE	129.65	-4.35
DLF	291.30	-4.10
REL COM	161.80	-3.37
STERLITE IND	745.85	-2.95
TATA STEEL	562.55	-2.56

GROUP A MOVERS

TOP GAINER

Company	Price	Gain %
GLAXOKLINE PHA	1649.65	4.30
FINANCIAL TECH	1497.30	2.25
EDUCOMP SOLN	708.50	1.88
TATA CHEM	295.55	1.48
GODREJ CONS	260.05	1.38

TOP LOSERS

Company	Price	Loss %
INDBUL REAL	154.90	-6.21
GVK POWER INFRA	42.00	-4.76
NAG CONSTRUCT	152.90	-4.62
LANCO INFRA	47.15	-4.55
CHAMBAL FERT	68.25	-4.48

TOP TRADED SENSEX STOCKS

Company	Turnover (Rs Cr)
HDFC BANK	149.82
RELIANCE IND	95.71
SBI	91.45
TATA STEEL	84.55
DLF	81.09

TURNOVERS (Rs CR)

Segment	Today	Yesterday
BSE Cash	3912.88	3998.02
NSE Cash	11855.05	11847.59
NSE F&O	92723.13	64858.39
Total	108491.06	80704.00

MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
796	2018	65	2879

CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	0	81	8	49	1	0	139
Lower Circuit	0	96	12	55	3	4	170
Total	0	177	20	104	4	4	309

BSE & NSE STOCKS

	Advances	Declines	Unchanged	Total
BSE	4	26	--	30
NSE	12	37	1	50

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