

US markets end mixed and European markets decline

- US stocks ended mixed, as earnings disappointed investors at companies from MBIA Inc. and Fluor Corp. to Electronic Arts Inc. The Dow Jones and NASDAQ gained 0.20%, 0.27%, respectively, while S&P 500 declined a marginal 0.01%. MBIA, the world's largest bond guarantor, tumbled 27% after posting a USD 727.8 mn loss on insured credit derivatives. Fluor sank 7.6% as the engineering firm cut its full-year profit forecast, while Electronic Arts sank 6.4% following its 11th straight quarterly loss
- The benchmark FTSE 100 ended the session little changed after HSBC Holdings Plc said earnings topped its forecasts, offsetting declines at Vodafone Group Plc and Barclays Plc. The FTSE 100 Index lost 4.63 points, or 0.09%, at 5,230.55. HSBC, surged 4% after saying pretax profit was "significantly" higher than in the year- earlier period as loan provisions declined. Barclays Plc, the UK's second-biggest bank, declined 5.1% after reporting a 54% slump in earnings. Vodafone Group Plc slid 1.5% after reporting results from its European operations that were worse than analysts predicted.

Index	Latest	1D Chg	YTD
Sensex (10-Nov-09)	16,440.56	(0.35)%	70.42%
Nifty (10-Nov-09)	4,881.70	(0.34)%	64.97%
Nasdaq (10-Nov-09)	1,773.17	0.27%	46.34%
DJIA (10-Nov-09)	10,246.97	0.20%	16.76%
S&P 500 (10-Nov-09)	1,093.01	(0.01)%	21.01%
FTSE 100 (10-Nov-09)	5,230.55	(0.09)%	17.96%
CAC 40 (10-Nov-09)	3,785.59	0.00%	17.64%
Nikkei 225 (10-Nov-09)	9,870.73	0.63%	11.41%
Hang Seng (10-Nov-09)	22,268.16	0.27%	54.77%

SENSEX

Top Gainers	Close	1D Gain
Tata Motors	593.75	2.26%
SBI	2,368.10	2.14%
RIL	2,052.60	1.39%

Top Losers	Close	1D Loss
Bharti Airtel	293.75	(4.47)%
Hero Honda Motors	1,500.40	(3.27)%
DLF	377.75	(3.17)%

NIFTY

Top Gainers	Close	1D Gain
Tata Motors	596.40	2.70%
Ambja Cements	84.40	2.37%
Cipla	301.00	2.24%

Top Losers	Close	1D Loss
Hero Honda Motors	1,485.00	(4.46)%
Bharti Airtel	294.00	(4.41)%
DLF	375.30	(3.78)%

Sectors	Close	1D Gain/(Loss)
PSU	9,158.61	1.97%
Metal	15,056.80	1.37%
Realty	3,968.34	(2.77)%
Teck	2,873.71	(1.39)%

Market Stats	BSE	NSE
Advance-Decline ratio	0.88	0.76
Volume (in'000)	404,900	881,416

Sensex ends flat amid volatility

Replicating positive cues from the global markets, the Sensex opened on an optimistic note at 16,552.43 with a positive gap of 53.71 points. However, the gauge pared most of its gains within the first hour of trade, owing to selling pressure in the index heavyweights. Nevertheless, the measure recovered in the late morning session as a result of fresh buying in the Metal and Oil and Gas stocks. However, in the early afternoon session the markets slipped into the negative territory after the Finance Minister said that the Government will need to wind back the stimulus in due course of time. Subsequently, in the late afternoon session the markets traded range-bound with negative bias due to selling pressure in the Realty and IT stocks. The Sensex finally ended the session below the 16,500 mark at 16,440.56 after making a marginal loss of 58.16 points or 0.35%.

The Nifty ended the session at 4,881.70 after a loss of 16.70 points or 0.34%.

Commodities Market

Gold declined as the dollar strengthened and some investors sell the metal to lock in record prices. Crude oil dropped as Tropical Depression Ida weakened, allowing workers to return to offshore platforms in the Gulf of Mexico, and as the dollar climbed. Copper fell on a rebounding dollar and on speculation demand is weakening in China, the world's largest metals user.

SENSEX

Open: 16,552.43; Close: 16,440.56;
Prv. Close: 16,498.72



Dow Jones

Open: 10,223.01; Close: 10,246.97;
Prv. Close: 10,226.94



FTSE 100

Open: 5,237.13; Close: 5,230.55;
Prv. Close: 5,235.18



International News

Headlines:



Most Active Stocks by Value (in Cr)

BSE	Close	%Chg	Value	Volume
RIL	2,052.60	1.39%	282	1,370,031
SBI	2,368.10	2.14%	239	1,013,129
Educomp Solutions	715.30	(9.34)%	218	2,937,311
HDIL	358.75	(1.35)%	159	4,406,897
DLF	377.75	(3.17)%	149	3,869,586

NSE	Close	%Chg	Value	Volume
RIL	2,057.10	1.62%	1,303	6,326,351
SBI	2,365.10	2.02%	986	4,183,301
ICICI Bank	895.75	0.82%	541	6,010,052
DLF	375.30	(3.78)%	515	13,388,895
Educomp Solutions	718.55	(9.03)%	485	6,499,464

Most Active Calls by Contract Value (in Cr)

	Value	Price	% Chg
Nifty 4900 Call Nov-09	6,041	98.00	(11.31)%
Nifty 5000 Call Nov-09	5,168	56.50	(13.21)%

Most Active Puts by Contract Value (in Cr)

Nifty 4800 Put Nov-09	6,736	84.40	18.96%
Nifty 4900 Put Nov-09	4,720	125.95	16.40%

Most Active Future Contracts by Value (in Cr)

NIFTY Nov-09	14,468	4,872.15	(0.63)%
RELIANCE Nov-09	1,555	2,053.35	1.17%

Top Contracts by Change in Open Interest

Contract	Change in OI	Price	% Chg
GVKPIL Nov-09	4,132,500	50.65	4.00%
GSPL Nov-09	1,354,200	94.15	4.38%

Fill open positions in Derivatives (NSE)

	Idx Fut	Ind Opt	Stk Fut	Stk Opt
No of Contracts	718,367	1,634,370	643,272	71,075
Amt (in cr.)	16,991	40,210	21,511	2,296

FII (Rs. Cr.)*	10-Nov-09	MTD	YTD
Equity inflows	2,995	16,124	505,058
Equity outflows	2,736	15,313	486,064
Net	259	811	18,994

DII (Rs. Cr.)*	10-Nov-09	MTD	YTD
Equity inflows	1,757	9,442	263,982
Equity outflows	1,575	7,802	238,558
Net	182	1,640	25,424

* FII & DII data is provisional in nature

Commodities	Latest	1DChg
Crude (USD/bbl) (Nov 10, 2009)	79.05	(0.48)%
Gold (USD/oz) (Nov 10, 2009)	1097.20	(0.38)%
Cu (USD/lb) (Nov 10, 2009)	2.95	(0.67)%

X-rate	10-Nov-09	1DChg	1MChg
USD/Rs.	46.5	(0.11)%	0.06%
GBP/Rs.	77.5	(0.51)%	4.01%
EUR/Rs.	69.7	0.16%	1.77%
JPY/Rs.	51.8	0.14%	(0.71)%

ADR/GDR (USD)	10-Nov-09	1DChg
Dr Reddy's	24.00	0.84%
HDFC Bank	129.74	(0.50)%
ICICI Bank	38.46	(1.84)%
Infosys	48.23	(1.81)%
Wipro	19.03	1.39%
Tata Communications	15.74	0.06%
Tata Motors	12.71	0.32%
MTNL	3.23	1.57%
Patni	21.12	(3.69)%
Sterite	17.49	0.00%

Macro Economic Indicators

GDP Growth*	6.70%
Inflation- Food (week ended Oct 24, 2009)	13.39%
Inflation- Primary Article and Fuels (week ended Oct 24, 2009)	(6.2)%
Inflation- Non Food Articles (week ended Oct 24, 2009)	(0.25)%
Index of Industrial Production (IIP) growth (August)	10.40%
CRR (Nov 10, 2009)	5.00%
SLR (Nov 10, 2009)	25.00%

* As per CSO Estimate for 2008-09

- German Finance Minister Wolfgang Schaeuble said Europe's biggest economy may cut its budget deficit to the European Union limit by 2013, while France is asking for an extra year. (Bloomberg)
- German investor confidence declined more than economists forecast in November. The ZEW Center for European Economic Research in Mannheim said its index of investor and analyst expectations dropped to 51.1 from 56 in October. (Bloomberg)
- US home sales increased 11% to a two-year high in the third quarter as an USD 8,000 tax credit for first-time buyers' boosted demand. Sales of existing single-family homes and condominiums increased to 5.3 million at an annualized, seasonally adjusted rate from the previous quarter, the National Association of Realtors said. The median price fell 11% from a year earlier to USD 177,900. (Bloomberg)

Corporate Announcements – India:

- Alstom Projects India** said it has bagged orders worth Rs. 3.65 bn from Hindalco Industries, for supply and installation of four gas treatment plants in the country. (BS)
- Siemens** said its energy unit has bagged an order worth Rs. 6.08 bn from Qatar's General Electricity & Water Corporation (Kahramaa) for constructing high voltage cables. (BS)
- Nagarjuna Construction Company** secured five orders aggregating to Rs. 7.22 bn. The construction major bagged the first order of Rs. 3.28 bn from Bangalore water supply and sewerage board at west Bangalore that will be completed over the next 26 months. The second order of Rs. 1.43 bn is from the water resources department Bihar for construction of bituminous road to be completed in 24 months. The third has come from Jain Housing Chennai for residential apartments valued at Rs 1.00 bn. (BS)

Economic and Political Headlines:

- The Reserve Bank of India which has begun exiting the easy money policy, said it found supporting growth without compromising financial stability a challenge, even as the government continues to be cautious about ending stimulus. (BS)

BSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
ARO GRANIT I	PEARL MINERAL PVT LTD	SELL	73,671	40.05
ARVIND INTER	KAPISH CACJGING PVT. LTD	BUY	57,196	15.85
ASIAN TEA EX	YOGESH SHASHIKUMAR SAVADEKAR	BUY	70,291	40.25
AUSTRAL COKE	SHRI HANUMAN INVESTMENTS PRIVATE LIMITED	SELL	1,500,000	10.30
BAMPSL SECUR	ANJU GUPTA	SELL	500,000	0.53
BAMPSL SECUR	JOLLY GUPTA	BUY	500,000	0.53
BAMPSL SECUR	KAUSHALYA GARG	BUY	508,191	0.53
BAMPSL SECUR	SUNDER DASS AGARWAL	SELL	485,029	0.53
CAT TECHNOL	VINOD AMRATLAL NAAI	BUY	317,650	17.37
CAT TECHNOL	VINOD AMRATLAL NAAI	SELL	188,468	17.50
CHAN GUIDE I	MANOJ HIRACHAND MOTTA	SELL	80,073	104.70
DMC INTER	SFS INFINITE LIMITED	BUY	52,520	23.15
FILAT FASH	RIDDHISIDDHI BULLIONS LIMITED	BUY	65,000	20.68
GOLDSTON TEC	HEMANT MADHUSUDAN SHETH	SELL	124,000	26.97
GOLDSTON TEC	PREM MOHANLAL PARIKH	BUY	195,000	26.75
HGSL	AASIA ESTATE DEVELOPERS	SELL	625,000	545.00
HGSL	AASIA MANAGEMENT & CONSULTANCY PVT LTD	BUY	625,000	545.00
HINDUJA VENT	AASIA ESTATE DEVELOPERS	SELL	725,000	335.00
HINDUJA VENT	AASIA MANAGEMENT & CONSULTANCY PVT LTD	BUY	725,000	335.00
JAI MATA GLA	MOTI LAL BHASIN	SELL	479,275	3.07
JAMNA AUTO I	CLEARWATER CAPITAL PARTNERS (CYPRUS) LIMITED	SELL	600,000	42.05
JAMNA AUTO I	HEMANT JAGDISH ASHAR	BUY	450,000	42.05
OMKAR OVERSE	RAJNIKANT RAMANBHAI JADAV	BUY	50,102	56.23
OMKAR OVERSE	SATYABHAMA CHAMPALAL AGARWAL	SELL	99,665	55.96
SANGUINE MD	KIRAN MAHENDER PALBAHL	SELL	75,000	3.35
SHR GANE SPI	HETALVIJAYSHAH	BUY	300,000	2.40
SHR GANE SPI	KAMLESH NAVINCHANDRA SHAH HUF	BUY	475,000	2.40
SHR GANE SPI	NITIN MANOHAR PRADHAN	SELL	900,000	2.40
SHR GANE SPI	ONLINE CAPITAL & SECURITIES P	SELL	400,000	2.40
SHR GANE SPI	PAULOMI KETAN DOSHI	BUY	475,000	2.40
SHR GANE SPI	RUPAL PIYUSH AVLANI	BUY	364,758	2.40
THINKSOFT	MANISH VIRCHAND LAKHANI	BUY	75,000	236.48

Note: Bulk Deals over and above 50,000 shares are only considered

NSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
AUSTRAL	SHRI HANUMAN INVESTMENTS PRIVATE LTD	SELL	3,609,944	10.32
AUSTRAL	VIJIT ASSET MANAGEMENT PRIVATE LIMITED	BUY	1,467,884	10.44
AUSTRAL	VIJIT ASSET MANAGEMENT PRIVATE LIMITED	SELL	882,884	10.40
EDELWEISS	RELIANCE MUTUAL FUND	BUY	1,231,000	482.00
EDELWEISS	SHUAA CAPITAL PSC	SELL	1,230,070	482.00
ITI	PRASHANT JAYANTILAL PATEL	BUY	147,975	49.69
ITI	PRASHANT JAYANTILAL PATEL	SELL	98,975	49.45
POLARIS	ORBITECH LIMITED	SELL	750,000	166.04
RUCHISOYA	LIFE INSURANCE CORPORATION	BUY	1,456,680	77.00
RUCHISOYA	MAVI INVESTMENT FUND	SELL	1,955,246	77.44
RUCHISOYA	SUNSHINE FINVEST PRIVATE LIMITED	SELL	1,100,000	77.00
SURYAROSNI	RAJASTHAN GLOBAL SECURITIES LTD	SELL	137,383	56.85

Note: Bulk Deals over and above 50,000 shares are only considered

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