

US markets end mixed and European markets are little changed

- US stocks ended mixed lifted by a rise in Boeing's stock, while a mixed group of economic figures kept the broader S&P 500 in check. The Dow Jones and NASDAQ advanced 0.42% and 0.40%, respectively, while S&P 500 declined 0.03%. Bank of America Corp. and Schlumberger Ltd. paced declines that sent financial and energy companies lower. Boeing Co., DuPont Co. and 3M Co. led gains that drove the Dow Jones higher after reports showed growth in Philadelphia manufacturing, a drop in jobless claims and no change in consumer prices.
- The benchmark FTSE 100 was little changed as a sell-off in bank stocks offset a rally in GlaxoSmithKline Plc. The FTSE 100 Index slid 2.01 points, or 0.04%, and ended at 5,642.62. Royal Bank of Scotland Group Plc lost more than 3% as the biggest government-controlled bank warned a GBP 2.9 bn pension deficit may rise. Banks also fell as Citigroup Inc. downgraded global financial shares. Glaxo jumped after Novartis AG gave up US rights to a potential rival to its best-selling drug.

Index	Latest	1D Chg	YTD
Sensex (18-Mar-10)	17,519.26	0.17%	0.31%
Nifty (18-Mar-10)	5,245.90	0.27%	0.86%
Nasdaq (18-Mar-10)	1,943.94	0.40%	4.50%
DJIA (18-Mar-10)	10,779.17	0.42%	3.37%
S&P 500 (18-Mar-10)	1,165.82	(0.03)%	4.55%
FTSE 100 (18-Mar-10)	5,642.62	(0.04)%	4.24%
CAC 40 (18-Mar-10)	3,938.18	(0.50)%	0.05%
Nikkei 225 (18-Mar-10)	10,744.03	(0.95)%	1.87%
Hang Seng (18-Mar-10)	21,330.67	(0.25)%	(2.48)%

SENSEX

Top Gainers	Close	1D Gain
JaiPrakash Associates	152.20	2.53%
Reliance Comm	164.40	2.11%
Infosys	2,784.75	1.66%

Top Losers	Close	1D Loss
M&M	1,087.15	(3.32)%
ONGC	1,054.50	(1.88)%
TCS	826.95	(1.64)%

NIFTY

Top Gainers	Close	1D Gain
IDEA	67.20	4.43%
JaiPrakash Associates	152.15	2.56%
SAIL	245.65	2.50%

Top Losers	Close	1D Loss
M&M	1,089.90	(2.97)%
BPCL	525.90	(2.25)%
TCS	826.20	(1.72)%

Sectors	Close	1D Gain/(Loss)
Bankex	10,410.44	0.61%
Teck	3,398.67	0.57%
FMCG	2,798.82	(0.55)%
PSU	9,089.71	(0.40)%

Market Stats	BSE	NSE
Advance-Decline ratio	0.80	0.80
Volume (in'000)	405,400	687,529

Sensex gains on outlook revision by S&P

The Sensex surged in the opening trades of the day but soon fell amid mixed Asian markets. Stocks were volatile as traders rolled over positions in the derivatives segment from the March 2010 series to the April 2010 series ahead of the expiry of the near-month March 2010 contracts on Thursday, 25 March 2010. The bourse remained sluggish in late-afternoon trades despite over 1% drop in the food price inflation to 16.30% for the week ended March 6, 2010 against 17.81% recorded in the earlier week. The Index touched an intraday low of 17,417.61 as European markets opened on a weak note as a reaction to the lingering of the Greece crisis. Subsequently, the Sensex entered the positive terrain at the fag end of the day after Standard & Poor's revised India's rating outlook to stable from negative, and the Sensex closed at 17,519.26, gaining 29.18 points or 0.17%.

The Nifty added 14 points or 0.27% to end the day at 5,245.90.

Commodities Market

Crude oil fell for the first time in three days as a stronger dollar trimmed demand for commodities as an alternative investment. Gold futures ended higher in spite of a strong dollar, as sovereign debt worries surrounding Greece and uncertainties about currencies prompted safe-haven buying. Copper prices fell for the first time in three days as the dollar's rebound eroded the appeal of most metals as an alternative investment.

SENSEX

Open: 17,492.81; Close: 17,519.26;
Prv. Close: 17,490.08



Dow Jones

Open: 10,733.44; Close: 10,779.17;
Prv. Close: 10,733.67



FTSE 100

Open: 5,620.53; Close: 5,642.62;
Prv. Close: 5,644.63



International News

Headlines:



Most Active Stocks by Value (in Cr)

BSE	Close	%Chg	Value	Volume
ARSS Infra	898.15	(2.94)%	692	7,372,101
United Bank	68.80	4.24%	202	28,299,084
Hindustan Copper	516.25	(2.80)%	169	3,108,461
Bajaj Electricals Ltd	212.50	3.41%	164	7,700,204
Texmo Pipes	117.70	(17.95)%	127	9,871,197
NSE	Close	%Chg	Value	Volume
ARSS Infra	911.00	(1.70)%	869	9,260,329
ICICI Bank	969.00	2.16%	452	4,717,742
United Bank	68.75	4.17%	393	55,114,410
RIL	1,076.50	0.64%	375	3,495,591
Unitech	73.40	(0.14)%	326	44,221,122

Most Active Calls by Contract Value (in Cr)

	Value	Price	% Chg
Nifty 5200 Call Mar-10	7,664	76.25	15.09%
Nifty 5300 Call Mar-10	5,435	22.60	20.86%

Most Active Puts by Contract Value (in Cr)

Nifty 5200 Put Mar-10	6,861	23.35	(19.06)%
Nifty 5300 Put Mar-10	3,415	62.90	(17.29)%

Most Active Future Contracts by Value (in Cr)

NIFTY Mar-10	8,638	5,255.60	0.31%
NIFTY Apr-10	1,208	5,258.60	0.35%

Contract	Change in OI	Price	% Chg
ISPATIND Apr-10	13,782,150	19.60	0.00%
GTLINEFRA Apr-10	9,724,250	42.30	1.81%

Fill open positions in Derivatives (NSE)

	Idx Fut	Ind Opt	Stk Fut	Stk Opt
No of Contracts	436,021	1,566,988	541,985	66,933
Amt (in cr.)	11,254	40,820	18,976	2,450

Fills (Rs. Cr.)*	18-Mar-10	MTD	YTD
Equity inflows	2,458	36,099	131,217
Equity outflows	1,974	25,573	129,880
Net	485	10,526	1,337

DII's (Rs. Cr.)*	18-Mar-10	MTD	YTD
Equity inflows	1,152	15,043	75,669
Equity outflows	1,206	19,551	66,611
Net	(53)	(4,508)	9,058

* Fill & DII data is provisional in nature

Commodities	Latest	1DChg
Crude (USD/bbl) (Mar 18, 2010)	82.20	(0.88)%
Gold (USD/oz) (Mar 18, 2010)	1126.00	0.16%
Cu (USD/lb) (Mar 18, 2010)	3.40	(0.66)%

X-rate	18-Mar-10	1DChg	1MChg
USD/Rs.	45.5	0.18%	(1.58)%
GBP/Rs.	69.6	0.69%	(3.85)%
EUR/Rs.	62.2	(0.53)%	(0.86)%
JPY/Rs.	50.5	0.66%	(0.79)%

ADR/GDR (USD)	18-Mar-10	1DChg
Dr Reddy's	27.56	0.07%
HDFC Bank	129.66	(1.20)%
ICICI Bank	42.40	(0.35)%
Infosys	61.77	1.03%
Wipro	23.95	(1.07)%
Tata Communications	12.77	1.59%
Tata Motors	18.26	(2.72)%
MTNL	3.20	(0.31)%
Patni	23.33	0.69%
Sterlite	17.98	(3.23)%

Macro Economic Indicators

GDP Growth*	6.70%
Inflation (for the month of February, 2010)	9.89%
Index of Industrial Production (IIP) growth (January)	16.70%
CRR (Mar 18, 2010)	5.75%
SLR (Mar 18, 2010)	25.00%

* As per CSO Estimate for 2008-09

The cost of living in the US was unchanged in February, underscoring the Federal Reserve's forecast that inflation will remain low. The consumer-price index didn't increase for the first time since a decrease in March 2009, and followed a 0.2% gain in January, Labor Department figures showed. Excluding food and energy costs, the so-called core index increased 0.1%. (Bloomberg)

The index of US leading indicators rose 0.1% in February, pointing to an economy that may expand at a slower pace in the second half of 2010. The increase in the New York-based Conference Board's measure of the outlook for three to six months matched expectations and followed a 0.3% rise in January. (Bloomberg)

China was the only one of the euro area's main trading partners to boost purchases of goods from the region last year as the Asian economy reinforced its position as the engine of global growth. Euro-area exports to China rose 4% in 2009, the European Union's statistics office said. Overall shipments abroad from the 16-nation region fell 18%, with those to the US and the UK, the euro area's biggest trade partners, declining about 20%. (Bloomberg)

Corporate Announcements – India:

- Sun Pharma** received approval from the US health regulator for generic version of anti-allergic product Prometh syrup. (BS)
- Idea Cellular** has allotted 19.91 crore shares to the shareholders of Spice Communications that has been merged with the Company. (BS)
- Fedders Lloyd Corporation** said the company in a consortium with Spain's Cobra Instalaciones bagged a power distribution project worth Rs. 2.57 bn from Madhya Pradesh Kshetra Vidyut Vitaran. (BS)

Economic and Political Headlines:

- India's food price inflation eased in early March but fuel inflation continued to rise, adding upward pressure on headline inflation and maintaining the case for the Reserve Bank to raise rates at its April policy review. Data released showed the food price index rose 16.30% in the year to March 6, lower than an annual rise of 17.81% in the previous week, continuing a downward trend for the second straight week. (BS)

BSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
Action Fin	INTEGRATED FINANCIAL SERVICES LIMITED	SELL	52,000	23.01
Amtek Auto	SWISS FINANCE CORPORATION (MAURITIUS) LTD	BUY	1,000,000	177.90
ARSS INFRA	JMP SECURITIES PVT LTD	BUY	124,664	953.68
ARSS INFRA	JMP SECURITIES PVT LTD	SELL	108,188	970.76
Avance Tech	CHANDRAKANT B SHAH	SELL	1,407,341	5.03
Aviva Inds	BHARVINBHAI SURESHBHAI PATEL	BUY	96,466	23.75
Bafna Pharma	ADITICON SERVICES INDIA PRIVATE LIMITED	BUY	95,299	34.46
Bafna Pharma	MAHESH CHANDAK	SELL	189,745	33.88
Bafna Pharma	RAJ INVESTMENT	BUY	115,225	33.57
Bafna Pharma	RAJ INVESTMENT	SELL	90,225	33.55
Bafna Pharma	RENEKA M	BUY	83,623	34.23
Bajaj Elect	ANANT BAJAJ	BUY	600,000	216.00
Bajaj Elect	BAJAJ HOLDINGS AND INVESTMENT LIMITED	BUY	3,964,000	209.84
Bajaj Elect	KIRAN BAJAJ	BUY	1,000,000	215.00
Bajaj Elect	KUMUD BAJAJ	SELL	520,000	209.00
Bajaj Elect	MADHUR BAJAJ	SELL	760,000	208.00
Bajaj Elect	NIRAJ BAJAJ	SELL	700,000	212.00
Bajaj Elect	NIRAJ BAJAJ HUF	SELL	605,000	212.00
Bajaj Elect	RAHULKUMAR BAJAJ	SELL	3,000,000	215.67
Bajaj Elect	RAHULKUMAR BAJAJ HUF	SELL	942,000	213.10
Bajaj Elect	SANJIVNAYAN BAJAJ	SELL	742,000	208.00
Bajaj Elect	SHEKHAR BAJAJ	BUY	2,000,000	216.00
Bampsl Sec	KAUSHALYA GARG	BUY	1,300,000	1.41
Bampsl Sec	PRAKASH CHAND GUPTA	BUY	417,685	1.41
Bampsl Sec	SUNIL KUMAR GUPTA	SELL	865,000	1.41
Bihar Tubes	NEETA HEMANT ASHAR	BUY	115,000	94.99
Century Extr	MAHIPAT IWDARMAL MEHTA	BUY	252,144	8.36
Clarus Finance	SANDEEP HISARIA	BUY	102,403	16.63
DMC Intl	CNB FINWIZ LIMITED	BUY	150,000	20.67
ECE Inds	GANDIV INVESTMENT PVT. LTD.	SELL	63,000	170.13
Expo Gas	BHASKARA REDDY KUNAREDDY	SELL	57,865	17.57
Fert & Chem Trv	B HIMANSHU DANI	SELL	50,051	51.76
Hercules Hoist	KIRAN BAJAJ	BUY	190,000	222.50
Hercules Hoist	RAHULKUMAR BAJAJ	SELL	370,000	219.00
Hercules Hoist	RAHULKUMAR BAJAJ HUF	SELL	190,000	222.50
Hercules Hoist	SHEKHAR BAJAJ	BUY	370,000	219.00
Hindustan Tin	GENERAL INSURANCE CORPORATION OF INDIA	BUY	60,000	133.98
India Foils	ESS DEE ALUMINIUM LTD	SELL	596,128	5.65
India Sec	SUBODH MASKARA	BUY	1,230,982	13.63
Indraprastha Med	APOLLO HOSPITALS ENTERPRISE LTD	BUY	1,974,183	46.44
Indraprastha Med	UNIQUE HOME HEALTH CARE LTD	SELL	1,972,433	46.45
Insutech India	ABSOLUTE LEASING & FINANCE PVT LTD	SELL	61,167	27.84
Jamna Auto	MUKUND MOTOR PARTS PVT LTD	BUY	130,253	73.64
Kadamb Constr	BANSAL VINIMAY (P) LTD.	SELL	110,000	54.00
Kadamb Constr	SILVERPEARL TRADING PRIVATE LIMITED	SELL	79,700	53.94
Kailash Ficom	ANNAPURNA MERCANTILE PVT. LTD.	BUY	85,000	25.50

Kailash Ficom	BIKASH SUREKA	BUY	79,500	25.50
Kailash Ficom	KARAN R BAHL	SELL	140,001	25.50
Kailash Ficom	KARAN RAJAN BAHL	SELL	82,611	25.54
Kailash Ficom	VIJAYPATH TRADECOM PRIVATE LIMITED	BUY	115,000	25.67
Kailash Ficom	VISHAL INFORMATION TECHNOLOGIES LTD	BUY	155,000	25.50
Kaleidoscope Films	CHEVIOT INTERNATIONAL LTD	SELL	417,530	7.47
KAY Power	ANJALI KAUSHIK	BUY	89,115	16.37
KAY Power	BAMPSL SECURITIES LTD	BUY	204,035	16.78
KAY Power	BAMPSL SECURITIES LTD	SELL	355,908	16.32
KAY Power	GIRRAJ PRASAD GUPTA	BUY	100,500	16.30
KAY Power	GIRRAJ PRASAD GUPTA	SELL	99,000	16.85
KAY Power	KAUSHALYA GARG	SELL	172,000	16.30
KAY Power	NAVAL KISHORE GUPTA	SELL	174,636	16.30
KAY Power	PRAKASH CHAND GUPTA	BUY	115,500	16.30
KAY Power	PRAKASHCHAND GUPTA	SELL	100,000	17.09
KAY Power	SUNDER DASS AGARWAL	BUY	135,100	17.04
KPR Mill	KOTAK MAHINDRA CAPITAL COMPANY LIMITED	SELL	225,000	107.00
Loyal Textile	MAYUR M.KOTHARI HUF	BUY	50,000	144.25
Loyal Textile	MAYUR MANGALDAS KOTHARI	SELL	50,000	144.25
MASTER	P T N V AMBICA RAMA SUDARSHAN	BUY	51,000	38.39
MASTER	P T N V AMBICA RAMASUDARSAN	SELL	56,679	38.40
Media Matrix	ANIL BABULAL VEDMEHTA	BUY	505,007	6.29
Media Matrix	RAMESH KUMAR HARAN	SELL	498,357	6.30
Mounteverest Trd	APL INFRASTRUCTURE PRIVATE LIMITED	SELL	120,000	157.51
Natura Hue Chem	JMP SECURITIES PVT LTD	BUY	87,227	15.38
Natura Hue Chem	JMP SECURITIES PVT LTD	SELL	91,441	16.13
Neha Intl	A3N HOLDINGS	SELL	170,000	132.51
Net 4 India	INDIA MAX INVESTMENT FUND LIMITED	BUY	100,000	88.30
Niraj Cement	RAJIV GANDHI	BUY	189,188	52.20
Niraj Cement	RAJIV GANDHI	SELL	56,075	51.29
Omkar Overseas	FALGUNIBEN MAHAVIRBHAI GOHIL	SELL	51,500	60.42
Polar Inds	ANKUR CHOPRA HUF	BUY	100,000	4.49
Polar Inds	JYOTI PORTFOLIO LIMITED	SELL	100,000	4.49
Punjab Wool	DHEERAJ KUMAR LOHIA	BUY	88,039	6.63
Punjab Wool	GIRISH GULATI	BUY	102,471	6.24
Punjab Wool	HANSRAJ MALHOTRA	SELL	143,176	6.25
Sapan Chem	NILESH KRUSHNA PALANDE	SELL	100,000	5.49
SARK SYS	DATTATRAYLAXMAN RAOPATIL	SELL	50,000	16.50
SEL Mfg Company	CREDO INDIA THEMATIC FUND LIMITED	SELL	152,907	67.98
Southern Ispat	RAJANBABU VENKATAMALLU GADDAM	BUY	100,000	24.36
Supertex Inds	NILESH SEVENTIBHAI MEHTA	SELL	1,200,000	2.42
Supertex Inds	RAMESH KUMAR MISHRA	BUY	903,000	2.43
Supertex Inds	RONAK ASHWIN CHOKSI	BUY	1,235,000	2.42
Upsurge Invest	SAROJ JUGAL MAHESHWARI	SELL	50,000	9.10
Well Pack Papers	PANDYA YAMINIBEN M	SELL	371,158	29.13

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

NSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
ARSSINFRA	JMP SECURITIES PVT LTD	SELL	93,915	948.99
ARSSINFRA	NAMAN SECURITIES & FINANCE PVT. LTD	BUY	79,825	934.26
ARSSINFRA	NAMAN SECURITIES & FINANCE PVT. LTD	SELL	103,048	939.33
GEMINI	AYODHYAPATI INVESTMENT PVT.LTD	SELL	587,787	25.56
HANUNG	TCG STOCK BROKING LTD	SELL	200,000	180.25
IVRCLINFRA	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	BUY	1,220,000	169.83
JAYSREETEA	SWISS FINANCE CORPORATION (MAURITIUS) LIMITED	BUY	58,052	340.32
	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE			
PIRLIFE	LIMITED	SELL	190,803	110.47
RENUKA	BARCLAYS CAPITAL MAURITIUS LIMITED	BUY	1,855,000	76.27
SELMCL	CREDO INDIA THEMATIC FUND LIMITED	SELL	300,000	68.00
SELMCL	KII LIMITED	SELL	126,907	67.05
	KUVERA CAPITAL PARTNERS LLP A/C KUVERA FUND			
SELMCL	LIMITED	SELL	226,896	67.10
TEXMOPIPES	MAVI INVESTMENT FUND LTD.	SELL	496,828	125.00
TEXMOPIPES	NAMAN SECURITIES & FINANCE PVT. LTD	BUY	122,098	128.44
TEXMOPIPES	NAMAN SECURITIES & FINANCE PVT. LTD	SELL	148,108	129.37
UNITEDBNK	BIRLA SUN LIFE INSURANCE CO LTD	BUY	2,126,000	71.93
ARSSINFRA	JMP SECURITIES PVT LTD	SELL	93,915	948.99
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