

# DAILY | FUNDAMENTAL



## OUR REPORTS

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- Theme Based Report

### Daily & Weekly

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- Annual Budget Review Report

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## INTRA DAY CHART OF SENSEX



After having a day off on Monday due to Eid celebrations, Indian stock market opened higher on Tuesday. However, market was unable to hold on to its gains as nervousness in Asian markets spilled over the sentiments. European markets led to a recovery in the last hours of trade. However the momentum was not strong enough for market to close on a firm note.

Nifty closed at 5,289.35, up by 5.15 points or 0.10 percent over the previous day closing of 5,284.20, after witnessing a low of 5,252.00 and a high of 5,304.25. Sensex closed at 17,569.53, up by 6.92 points or 0.04 percent over the previous day closing of 17,562.61. It touched an intraday low of 17,455.22 and high of 17,632.23.

The markets' breadth was positive. Out of 2,964 stocks traded, 1,434 stocks advanced, 1,399 stocks declined and 131 stocks remained unchanged. In Sensex, 12 stocks advanced, 17 stocks declined and 1 remained unchanged.

Among the sectors, BSE Consumer Durables, BSE Oil & Gas and BSE Power were the main gainers of the day, which increased by 0.94 percent, 0.20 percent and 0.19 percent respectively.

In BSE Consumer Durables sector, Titan Industries, C. Mahendra Exports and Gitanjali Gems increased by 2.35 percent, 2.10 percent and 0.79 percent respectively. In BSE Oil & Gas sector, Cairn India, Petronet LNG and Oil India increased by 5.03 percent, 0.82 percent and 0.28 percent respectively. In BSE Power sector, ABB, Reliance Infrastructure and Reliance Power increased by 4.28 percent, 3.81 percent and 3.52 percent respectively.

## MARKET TURNOVER (Rs.Cr)

NAME	LAST	PREVIOUS DAY
NSE CASH	8124.34	10088.55
NSE F&O	82073.20	93428.60

## NIFTY TOP TURNOVERS

COMPANY	LAST PRICE	SHARE TRADED	TOTAL TURNOVER (Rs. Cr)
SBIN	2001.00	2429408	481.59
ICICIBANK	878.00	2644096	232.45
TATAMOTORS	189.30	12237849	230.13
LT	1390.10	1572009	218.79
INFY	2840.50	763417	215.45

## NIFTY TOP GAINERS

COMPANY	LAST PRICE	CHANGE	% CHANGE
CAIRN	322.00	15.65	5.11
RCOM	87.00	3.75	4.50
RELINFRA	475.10	18.10	3.96
RPOWER	102.60	3.05	3.06
SBIN	2001.00	34.85	1.77

## NIFTY TOP LOSERS

COMPANY	LAST PRICE	CHANGE	% CHANGE
BPCL	603.55	20.80	(3.33)
SUNPHARMA	498.75	14.40	(2.81)
IDFC	125.40	3.60	(2.79)
HCLTECH	427.70	11.05	(2.52)
DLF	241.65	5.95	(2.40)

## OUTLOOK

Indian stock market is likely to remain lackluster in the shortened trading week, unless some major news flow doesn't shake the market. Stock specific activity is likely to dominate the trade next week as the earnings season as its peak. Among the majors, SBI, Ranbaxy Labs, IOC, Tata Comm, CESE, Moser Baer, Lupin, Voltas, Bharat Forge, Bombay Dyeing, Procter & Gamble, Apollo Tyres, PTC India, Balmer Lawrie, Neyveli Lignite, Ansal Properties, GMR Infra are scheduled to announce their results today. Despite the current uncertain environment that has emerged again in Europe, domestic market is unlikely to fall significantly as the better than expected results from some companies may arrest decline.

## DOMESTIC INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
SENSEX	17569.53	6.92	0.04
NIFTY	5289.35	5.15	0.10
BSE MID-CAP	6311.51	13.12	0.21
BSE SMALL-CAP	6946.05	-12.08	(0.17)
NSE CNX MIDCAP INDEX	7323.30	3.30	0.05

## SECTORAL INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
AUTO	9240.42	-7.75	(0.08)
CAPITAL GOODS	11019.34	16.76	0.15
FMCG	4183.21	-0.64	(0.02)
METAL	11834.38	-8.85	(0.07)
OIL & GAS	9044.09	17.93	0.20
HEALTHCARE	6139.04	-31.16	(0.51)
POWER	2232.03	4.29	0.19
REALTY	1898.03	-26.58	(1.38)
CONSUMER DURABLES	6584.51	61.02	0.94
BANK	11317.93	15.69	0.14
IT	5769.14	6.94	0.12

## GLOBAL INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
DOW JONES	12068.39	85.15	0.71
NASDAQ	2695.25	9.10	0.34
S&P 500	1261.12	7.89	0.63
FTSE	5581.40	70.68	1.28
CAC	3150.78	47.29	1.52
DAX	6029.48	100.76	1.70
MEXICO BOLSA	37024.61	335.23	0.91
BRAZIL BOVESPA	59198.77	528.85	0.90
RUSSIAN RTS	1575.49	12.38	0.78
NIKKEI 225	8655.51	-111.58	(1.27)
HANG SENG	19678.47	0.58	0.00
TAIWAN TAIEX	7600.79	-20.93	(0.27)
SHANGHAI	2503.84	-5.96	(0.24)
KOSPI	1903.14	-15.96	(0.83)
FTSE BURSA MALAYSIA KLCI	1480.46	2.95	0.20
JAKARTA COMPOSITE	3805.65	27.41	0.73
PSEi - PHILIPPINE SE	4314.67	42.95	1.01
STOCK EXCH OF THAI	983.44	27.42	2.87

## INDUSTRIAL METALS & ENERGY MARKETS

NAME	LAST PRICE	CHANGE	% CHANGE
COPPER (USD/T)	7870.00	45.00	0.58
ALUMINUM (USD/T)	2113.00	-9.00	(0.38)
ZINC (USD/T)	1964.00	12.00	0.61
LEAD (USD/T)	2018.75	8.75	0.44
OIL (USD/BBL)	96.10	0.58	0.61
NATURAL GAS (USD/MMBTU)	3.68	-0.02	(0.41)

## PRECIOUS METALS

NAME	LAST PRICE	CHANGE	% CHANGE
GOLD (USD/OZ)	1788.10	-7.10	(0.39)
SILVER (USD/OZ)	34.67	-0.29	(0.83)

## INDUSTRY INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
BALTIC DRY INDEX	1766.00	-18.00	(1.01)
BBG WORLD IRON/STEEL IDX	223.91	-0.63	(0.28)

## CURRENCIES

NAME	LAST PRICE	CHANGE	% CHANGE
USD-INR	49.48	0.37	0.75
EUR-INR	68.06	0.07	0.10
GBP-INR	79.48	0.77	0.98
INR-JPY	1.58	-0.01	(0.82)

## INSTITUTIONAL FLOW IN Cr (04/11/2011)

INSTRUMENT	PURCHASE	SALE	NET
FII (P)	2256.56	2127.94	128.62
DII	938.47	867.98	70.49
MUTUAL FUND (03/11)	589.00	438.50	150.60

## FII DERIVATIVE SEGMENT IN Cr (04/11/2011)

INSTRUMENT	PURCHASE	SALE	NET
INDEX FUTURE	1719.38	1404.95	314.43
INDEX OPTION	11644.16	11989.36	(345.20)
STOCK FUTURE	1430.43	1393.80	36.63
STOCK OPTION	326.79	337.63	(10.85)

## BULK & BLOCK DEALS

[http://www.bseindia.com/mktlive/market\\_summ/bulk\\_deals.asp](http://www.bseindia.com/mktlive/market_summ/bulk_deals.asp)

[http://www.bseindia.com/mktlive/market\\_summ/block\\_deals.asp](http://www.bseindia.com/mktlive/market_summ/block_deals.asp)

- ◆ **Reliance Power** posted consolidated net profit of INR2.35 billion for the quarter ended Sept. 30, 2011 as compared to INR2.34 billion for the quarter ended Sept. 30, 2010, representing marginal increase of 0.29 percent. Total consolidated income has increased from INR1.69 billion for the quarter ended Sept. 30, 2010 to INR4.88 billion for the quarter ended Sept. 30, 2011, representing an increase of 3 times.
- ◆ **Reliance Infrastructure** posted consolidated net profit of INR3.62 billion for the quarter ended Sept. 30, 2011 as compared to INR3.60 billion for the quarter ended Sept. 30, 2010, representing marginal increase of 0.40 percent. Total consolidated income has increased from INR39.69 billion for the quarter ended Sept. 30, 2010 to INR57.29 billion for the quarter ended Sept. 30, 2011, representing an increase of 44.34 percent.
- ◆ **Bank of India (BOI)** posted a net profit of INR4.91 billion for the quarter ended Sept. 30, 2011 as compared to INR6.17 billion for the quarter ended Sept. 30, 2010, representing a drop of 20.38 percent. Total income has increased from INR57.40 billion for the quarter ended Sept. 30, 2010 to INR77.28 billion for the quarter ended Sept. 30, 2011, representing an increase of 34.64 percent.
- ◆ **Infrastructure Development Finance Company (IDFC)** posted consolidated net profit of INR5.24 billion for the quarter ended Sept. 30, 2011 as compared to INR3.38 billion for the quarter ended Sept. 30, 2010, representing increase of 55.03 percent. Total consolidated income increased from INR12.17 billion for the quarter ended Sept. 30, 2010 to INR17.15 billion for the quarter ended Sept. 30, 2011, representing an increase of 40.92 percent.
- ◆ **Aurobindo Pharma** posted consolidated net loss of INR801.6 million for the quarter ended Sept. 30, 2011 as compared to net profit of INR1,983.2 million for the quarter ended Sept. 30, 2010. Net sales on the consolidated basis has decreased from INR11,126 million for the quarter ended Sept. 30, 2010 to INR10,753 million for the quarter ended Sept. 30, 2011, representing a decrease of 3.35 percent.
- ◆ **ABB** posted a net profit of INR221.57 million for the quarter ended Sept. 30, 2011 as compared to INR115.07 million for the quarter ended Sept. 30, 2010, representing increase of 92.56 percent. Total income has increased from INR13,490 million for the quarter ended Sept. 30, 2010 to INR17,435 million for the quarter ended Sept. 30, 2011, representing an increase of 29.25 percent.
- ◆ **Bosch** posted a net profit of INR2.88 billion for the quarter ended Sept. 30, 2011 as compared to INR2.36 billion for the quarter ended Sept. 30, 2010, representing increase of 22.04 percent. Total income has increased from INR17.15 billion for the quarter ended Sept. 30, 2010 to INR19.91 billion for the quarter ended Sept. 30, 2011, representing an increase of 16.10 percent.
- ◆ **Mahanagar Telephone Nigam (MTNL)** posted a net loss of INR8.64 billion for the quarter ended Sept. 30, 2011 as compared to net loss of INR6.05 billion for the quarter ended Sept 30, 2010. Total income has decreased from INR10.63 billion for the quarter ended Sept. 30, 2010 to INR8.96 billion for the year ended Sept. 30, 2011, representing a decrease of 15.73 percent.
- ◆ **REpower Systems SE** - wholly-owned subsidiary of Suzlon Energy signed a contract with EDF EN Canada Inc. to supply a total of 75 wind turbines in the Canadian province of QuÃ©bec. This is the third order from the framework agreement concluded between EDF Energies Nouvelles and REpower in November 2009. The REpower MM82 and MM92 turbines are intended for the Massif du Sud wind farm, located on the south shore of QuÃ©bec City.
- ◆ **Wipro Technologies** has been chosen by Premier Foods, the United Kingdom's largest food producer, as a strategic technology partner.

## CORPORATE ACTION BONUS / RIGHTS / STOCK SPLIT / ADR & GDR / FCCB / M&A / WARRANTS ETC.

COMPANY	RECORD DATE	Ex-DATE	DETAILS
GATI Limited	-	09/11/2011	Annual General Meeting & Interim Dividend RE0.50 Per Share
HCL Infosystems Limited	-	09/11/2011	Final Dividend INR2 Per Share and Interim Dividend RE1 Per Share (Purpose Revised)
Marico Limited	11/11/2011	09/11/2011	1st Interim Dividend RE0.30 Per Share (Purpose Revised)
Sonata Software Limited	11/11/2011	09/11/2011	Interim Dividend RE0.50 Per Share (Purpose Revised)

## OTHER EVENTS

- ◆ Earnings Expected: SBI, Ranbaxy Labs, IOC, Tata Comm, CESE, Moser Baer, Lupin, Voltas, Bharat Forge, Bombay Dyeing, Procter & Gamble, Apollo Tyres, PTC India, Balmer Lawrie, Neyveli Lignite, Ansal Properties, GMR Infra, Godawari Power and others.
- ◆ China's Industrial Production data for October 2011.
- ◆ China's Retail Sales data for October 2011.
- ◆ China Consumer Price Index data for October 2011.
- ◆ The U.S. MBA Mortgage Application data for the week ended November 04, 2011.
- ◆ Japan Exports-Imports data for September 2011.



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