

DAILY MARKET REVIEW

MARKET SUMMARY

Markets ended the September derivative series on a negative note. Sensex lost 145 points to close at 13547 while Nifty finished at 4110, down 50 points. Nifty and Sensex have lost 2.4% and 3.6% respectively in the September series. Suzlon was down over 7% in today's trade on the back of equity dilution concerns as company is considering raising Rs. 1800 cr. via rights issue on Sept. 27. Inflation for the week ended Sep. 13 is expected to be around 12.23% as against 12.14% for the previous week. In US, President Bush has called an emergency meeting on Thursday to hammer out details of the \$700 billion bailout plan.

Except Auto index, which ended marginally in the green, all other BSE sectoral indices finished in red. IT and Teck indices were down the most, losing 2% each. Wipro and Ranbaxy were top losers among the sensex stocks, down nearly 5% each, while HDFC Bank and ONGC gained 1.3% and 0.9%. BSE advance-decline ratio stood at 1:1.9.

MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
NIFTY	4162.15	4172.60	4077.50	4110.55	-50.70	-1.22
SENSEX	13716.88	13716.88	13430.68	13547.18	-145.34	-1.06
MIDCAP	5130.03	5140.28	5074.94	5093.05	-33.73	-0.66
SMLCAP	6110.75	6119.64	6036.56	6050.03	-51.48	-0.84
BSE-100	7150.19	7150.19	7011.61	7061.79	-74.04	-1.04
BSE-200	1663.09	1663.09	1632.27	1643.13	-17.05	-1.03
BSE-500	5234.89	5234.89	5142.99	5174.78	-51.7	-0.99

SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
IT	3418.03	3418.07	3329.64	3348.42	-68.69	-2.01
TECK	2760.92	2763.80	2689.12	2704.86	-54.76	-1.98
REALTY	3933.46	3933.46	3805.33	3840.21	-76.77	-1.96
POWER	2481.02	2481.02	2409.12	2432.00	-41.39	-1.67
CD	3153.61	3187.92	3096.98	3114.52	-52.32	-1.65
METAL	10159.48	10180.23	9921.83	9977.10	-165.19	-1.63
HC	3884.59	3905.79	3803.52	3825.56	-50.55	-1.30
FMCG	2189.91	2222.67	2158.05	2168.28	-21.40	-0.98
OIL&GAS	9432.77	9432.77	9229.08	9364.01	-71.84	-0.76
CG	11404.09	11404.09	11161.79	11257.13	-83.67	-0.74
PSU	6572.50	6593.67	6448.41	6535.87	-32.50	-0.49
BANKEX	6911.31	6934.75	6732.49	6863.47	-23.18	-0.34
AUTO	3847.82	3876.67	3819.26	3852.54	3.27	0.08

SENSEX MOVERS

TOP GAINER

Company	Price	Gain %
HDFC BANK	1298.30	1.28
ONGC	1071.15	0.87
L & T	2566.25	0.59
MARUTI	703.50	0.38
NTPC	179.25	0.36

TOP LOSERS

Company	Price	Loss %
WIPRO	352.90	-4.81
RANBAXY	296.20	-4.70
HINDALCO	104.50	-4.00
GRASIM	1867.40	-3.50
TCS	690.20	-3.26

GROUP A MOVERS

TOP GAINER

Company	Price	Gain %
INDIA CEMENT	136.60	5.60
BAJAJ AUTO	473.20	4.82
PUNJ LLOYD	303.95	4.74
CESC	291.40	4.15
MARICO	60.25	3.79

TOP LOSERS

Company	Price	Loss %
SUZLON	182.00	-7.17
GMDC	141.80	-6.65
PANTALOON	274.20	-6.08
KSK ENERGY	214.95	-5.99
SIEMENS	456.20	-5.91

TOP TRADED SENSEX STOCKS

Company	Turnover (Rs Cr)
TATA STL	548.55
RELIANCE	287.55
ICICI BANK	151.26
SBI	110.52
BHARTI ARTL	97.55

TURNOVERS (Rs CR)

Segment	Today	Yesterday
BSE Cash	5070.61	4319.27
NSE Cash	15311.01	11829.24
NSE F&O	82697.69	67051.71
Total	103079.31	83200.22

MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
899	1688	78	2665

CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	0	65	7	26	1	22	121
Lower Circuit	0	61	7	47	2	31	148
Total	0	126	14	73	3	53	269

BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
25-Sep	AFTEK LTD	MORGAN STANLEY INVTS MAURI	SELL	1142214	36.95	1.22
25-Sep	B.L.KASHYAP	SWISS FINANCE CORP MAURI	SELL	119764	825.00	0.58
25-Sep	B.L.KASHYAP	VIC INFRASTRUCTURE INVTS	BUY	119764	825.00	0.58
25-Sep	BIHAR TUBES	MAVI INVESTMENT FND LIMITED	SELL	80000	190.01	0.60
25-Sep	COUNTRY CLUB (I)	CLSA MAURITIUS LIMITED	BUY	385235	282.05	2.49
25-Sep	COUNTRY CLUB (I)	GRANTS INVEST LTD	SELL	385235	282.05	2.49
25-Sep	ENTERTAINMENT NT	MORGAN STANLEY INVTS MAURI	SELL	288407	270.00	0.61
25-Sep	GAMMON INDIA	HDFC MUTUAL FUND	SELL	1000000	165.00	1.14
25-Sep	GAMMON INDIA	WARHOL LIMITED	BUY	1000000	165.00	1.14
25-Sep	HTMT GLOBAL	MORGAN STANLEY INVTS MAURI	SELL	471812	199.00	2.30
25-Sep	HTMT GLOBAL	MORGAN STANLEY INVTS MAURI	SELL	1096149	199.00	5.34
25-Sep	LIC HOUSING FIN	MORGAN STANLEY INVTS MAURI	SELL	1237579	302.25	1.46
25-Sep	WEST COAST PAPER	CLSA MAURITIUS LIMITED	BUY	2317489	50.00	4.04
25-Sep	WEST COAST PAPER	GRANTS INVEST LTD	SELL	2317489	50.00	4.04

BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
25-Sep	BALRAMPUR CHINI	MACQUARIE BANK LTD	SELL	1876800	83.98	0.73
25-Sep	BALRAMPUR CHINI	NEW VERNON INDIA LTD	BUY	1413600	84.45	0.55
25-Sep	DEVELOP.CR.BANK	STANDARAD CHARTERED ARBI FND	BUY	1001000	38.76	0.57
25-Sep	EDUCOMP SOLUTION	CITIGROUP GLOBAL MARKETS	BUY	107636	3447.66	0.62
25-Sep	FAME INDIA	CLSA (MAURITIUS) LIMITED	BUY	1504999	33.55	4.32
25-Sep	FAME INDIA	GRANTS INVESTMENT LIMITED	SELL	1504999	33.55	4.32
25-Sep	MOTILAL OSWAL	GOLDMAN SACHS INVESTMENTS	SELL	950553	103.00	3.35
25-Sep	MOTILAL OSWAL	HDFC GROWTH FUND	BUY	950000	103.00	3.35
25-Sep	MSK PROJECTS	CLSA (MAURITIUS) LIMITED	BUY	1573858	60.00	6.90
25-Sep	MSK PROJECTS	GRANTS INVESTMENTS LTD.	SELL	1573858	60.00	6.90
25-Sep	MURLI INDUSTRIES	CLSA (MAURITIUS) LIMITED	BUY	139868	260.00	1.37
25-Sep	MURLI INDUSTRIES	GRANTS INVESTMENTS LTD.	SELL	139868	260.00	1.37
25-Sep	NATL. ALUMINIUM	CITIGROUP GLOBAL MARKETS	SELL	559475	394.62	0.09
25-Sep	SHREE RENUKA SUG	MACQUARIE BANK LTD	SELL	2210000	107.24	0.82

Disclaimer

This document has been prepared by Anagram Capital Ltd.(Anagram), for use by the recipient only and not for circulation. The information and opinions contained in the document have been compiled from sources believed to be reliable. Anagram does not warrant its accuracy, completeness and correctness. This document is not, and should not be construed as, an offer to sell or solicitation to buy any securities. This document may not be reproduced, distributed or published, in whole or in part, by any recipient hereof for any purpose without prior permission from us. Anagram and the analyst(s), including his dependent family members may have an interest in the securities mentioned above.

Copyright in this document vests exclusively with Anagram Capital Limited
 To unsubscribe, send a mail to unsubscribechinta@gmail.com