

Morning Market

Aug 03, 2009



News Analytics		
News	Sector	Stock
Maruti 's July total sales went up by 33.5% at 78,074 units (YoY)		Maruti
TVS Motor July Sales -2 Wheeler sales at 1.21 lakh units versus 1.2 lakh units (YoY) -Scooter sales at 27,673 units versus 24,156 units (YoY) -Exports at 13,061 units versus 16,015 units (YoY)		TVS Motor
M&M YoY -Total sales up 27% at 22463 versus 17302 units -UV sales up 56% to 16688 units		M&M
Pantaloon Retail puts restructuring plan on hold. It is waiting for more clarity on FDI notifications		Pantaloon Retail
Essar Oil said that it is making \$2 million payment to Kenyan government to withdraw share buyback option		Essar Oil
Aban Offshore board approves QIP of up to Rs 2,500 crore		Aban Offshore
Hero Honda July total sales up 30.3% at 3.66 lakh units versus 2.81 lakh units		Hero Honda
JSW plans IPO of power business		JSW
Lanco Infra QIP floor price is set at Rs 394.85/share		Lanco Infra

US

OTHER REGIONS

Japan's wages fell at the fastest pace on record in June as companies cut bonuses to protect dwindling profits, adding to evidence that consumers are unlikely to contribute to an economic recovery.

DATA RELEASES				
TIME	COUNTRY	DATA	SURVEY	PRIOR
	India	Exports YoY%	-	-29.2%
	India	Imports YoY%	-	-39.2%
19:30	US	ISM Manufacturing	46.5	44.8
19:30	US	Construction Spending MoM	-0.5%	-0.9

CORPORATE EVENTS

Date	Company	Event

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TRACKING MARKETS

Index	Last price	1 D Chng	5 D Chng
Sensex	15670.31	1.83	1.89
Nifty	4636.45	1.42	1.49
Dow Jones	9171.61	0.19	0.86
FTSE (UK)	4608.36	-0.50	0.69
Nasdaq	1978.50	-0.29	0.64
Nikkei	10366.79	0.10	2.76
Hang Seng	20724.35	0.73	2.33

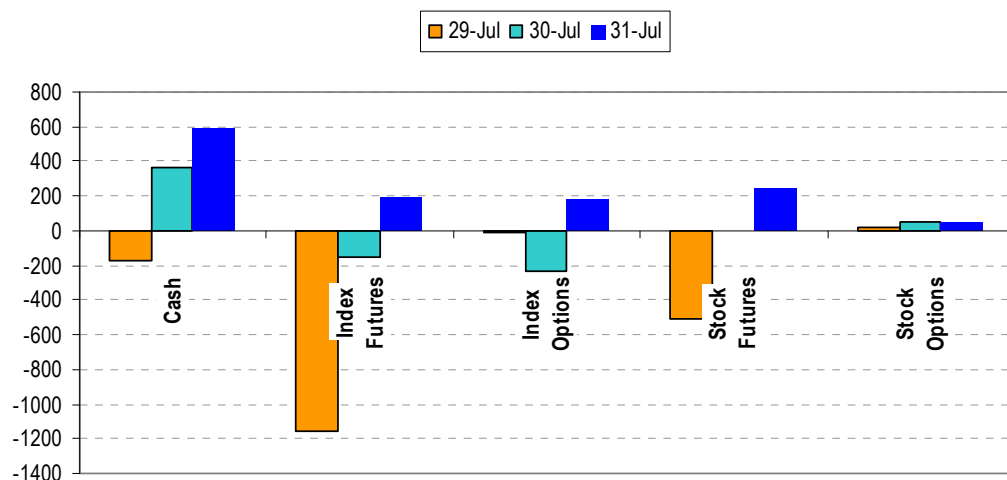
Index	Last price	1 D Chng	5 D Chng
Shipping	1892.87	2.57	1.70
Baltic Dry Index	3350.00	-2.76	0.15
Coal	3788.23	1.60	4.65
Steel	3293.80	1.55	2.95
Water	1817.16	-0.07	0.25
Nuclear	2341.18	0.35	-1.87
Timber & Forestry	883.82	0.21	2.66

COMMODITIES AND CURRENCIES

	Last price	1 D Chng	5 D Chng
Gold (MCX)	14811.00	0.06	-0.87
Silver (MCX)	22472.00	0.02	-1.12
Crude (Nymex)	70.13	0.95	2.53
Copper (MCX)	277.40	0.40	2.68
Zinc (MCX)	83.40	0.48	2.71

Currency	Last price	1 D Chng	5 D Chng
INR	47.84	0.19	0.67
Euro	1.42	-0.10	0.08
Yen	94.73	-0.06	0.47

FII ACTIVITIES



FII Figures (Cr)	
31-Jul	
Cash	582.12
Index Futures	189.77
Index Options	182.09
Stock Futures	239.66
Stock Options	48.55

Cumulative FII positions as percentage of total gross market position in the derivative segment as on July 31, 2009 is 36.89%

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1 DAY CHANGE

Sector	India (t-1)	Asia (t)	US(t)	EU(t)	Brazil(t)
Automobiles	-0.31	3.32	5.54	0.74	-
Banks	2.18	0.75	1.40	0.58	-0.62
Chemicals	2.67	2.82	0.40	0.93	6.54
Construction and Materials	0.84	0.58	0.90	1.15	4.66
Electricity	0.99	1.68	-1.17	-0.47	-0.01
Fixed Line Communication	0.71	-0.18	-0.57	-0.35	0.63
Financials	1.08	0.63	0.35	0.03	0.19
Retailers	1.09	-0.14	-0.06	-0.16	1.73
Engineering	2.43	1.17	1.16	1.27	-
Metals	1.34	2.48	2.48	-0.33	1.28
Media	0.40	-0.67	0.00	0.91	0.26
Mining	3.35	0.58	3.11	0.35	-
Mobile Telecommunicatios	-2.01	-0.57	-0.50	0.09	0.93
Oil and Gas Producers	3.18	1.65	0.70	-1.33	0.83
Pharmaceutical	0.98	0.04	-0.76	-0.53	-
Real Estate	-1.30	-0.35	0.02	-0.07	1.99
Software	1.01	0.16	-0.51	0.58	-

STRONG

WEAK

5 DAY CHANGE

Sector	India (t-1)	Asia (t)	US(t)	EU(t)	Brazil(t)
Automobiles	0.04	4.57	11.02	0.21	-
Banks	2.05	3.33	8.25	2.89	-0.25
Chemicals	-1.20	4.98	2.25	3.16	6.54
Construction and Materials	1.77	-0.40	2.74	3.54	3.83
Electricity	-0.06	4.58	-2.34	2.38	1.46
Fixed Line Communication	0.00	0.91	2.44	3.39	2.98
Financials	0.66	2.33	1.71	0.59	-0.15
Retailers	4.06	4.06	1.22	3.22	5.42
Engineering	5.67	4.38	1.88	1.36	-
Metals	2.09	7.59	1.12	0.08	1.26
Media	6.06	-0.64	1.21	2.77	-4.27
Mining	3.60	-2.27	-0.14	1.77	-
Mobile Telecommunicatios	-1.30	1.91	-11.50	0.93	2.03
Oil and Gas Producers	2.40	-0.40	-1.06	-1.16	-3.58
Pharmaceutical	0.33	-1.36	-0.69	2.07	-
Real Estate	2.38	0.39	3.72	1.08	6.38
Software	5.92	0.69	-0.95	4.95	-

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TECHNICALS

Sector	Prev Expiry	Stock	Close	S	R	30DMA	100DMA	200DMA	Trend
Nifty Spot	4,242	-	4,636.45	4585-4590	4690	4332	3845	3383	Positive
Nifty Fut	4,242	-	4,636.05			4332	3847	3382	Positive
Bank	1,704	SBI	1,811.65	1745-1750	1840-1845	1688	1462	1332	Positive
Bank	700	ICICI	758.50	732-730	777-778	720	580	492	Positive
Bank	1,465	HDFC	1,499.10	1465-1470	1525-1530	1448	1252	1113	Positive
Bank	344	Bank of India	328.55	322	341-342	337	285	272	ST Negative
Bank	779	Axis Bank	917.15	900	955-958	837	647	567	Positive
Financials	897	Rel Cap	885.40	845-848	895-893	866	693	612	Positive
Financials	52	IFCI	51.25	48.5	53.50-54	49	37	29	Positive
Real Estate	317	DLF	396.20	388-389	418-420	336	285	256	Positive
Real Estate	226	HDIL	276.95	268-269	289-290	236	193	151	Positive
Oil and Gas	1,958	Reliance	1,955.40	1910-1915	1975-1980	1947	1866	1571	Positive
Oil and Gas	121	RPL	121.40	115-116	124-125	121	116	101	Positive
Oil and Gas	1,020	ONGC	1,164.05	1125-1120	1185-1190	1059	957	834	Positive
Oil and Gas	159	Essar Oil	151.00	145-146	156-157	143	136	109	Positive
Oil and Gas	224	Cairn	235.30	230	240	230	213	184	Positive
Oil and Gas	88	RNRL	83.45	82.50-83	90	82	69	59	Positive
Metals	400	Tata Steel	462.35	445-446	475-476	404	326	267	Positive
Metals	148	SAIL	175.30	165-166	179-180	160	135	109	Positive
Metals	576	Sterlite	644.80	615-617	660-662	607	506	386	Positive
Metals	84	Hindalco	100.30	94-94.50	106.50-107	85	72	63	Positive
Infra	2,130	BHEL	2,230.30	2175	2300	2162	1875	1615	Positive
Infra	218	JP Associates	240.80	235-234	248-249	214	162	118	Positive
Infra	1,529	LT	1,506.35	1465-1460	1545-15550	1482	1150	958	Positive
Sugar	142	Renuka	167.05	160-161	176-177	144	120	93	Positive
Sugar	205	Bajaj Hind	184.20	177	200-201	183	128	91	Positive
Sugar	96	Praj	90.55	88	95	88	81	72	Positive
FMCG	193	ITC	249.20	239-238	256-255	214	194	183	Positive
FMCG	259	HUL	291.50	285-286	298-299	271	248	247	Positive
Fertilizers	63	Chambal	56.65	55-55.50	59.50-60	59	53	46	ST Negative
Fertilizers	41	Nagarjuna	35.70	32.5	37	36	30	23	ST Negative
Power	1,238	Rel Infra	1,205.55	1155-1160	1225	1163	927	733	Positive
Power	194	NTPC	215.60	208	224-225	201	197	183	Positive
Power	169	Rpower	168.20	166-167	174-175	166	146	-	Positive
Power	118	Suzlon	99.80	95	110-111	100	82	70	ST Negative
Power	1,155	Tata Power	1,301.35	1235-1240	1330	1151	983	860	Positive
Tele Com	300	Rcom	275.75	272-273	285-286	278	251	229	ST Negative
Tele Com	794	Bharti	410.10	401-402	428-430	405	375	354	Positive
Pharma	266	Ranbaxy	280.05	268-269	284-285	261	221	220	Positive
IT	1,759	Infosys	2,064.35	1995-2000	2075-2080	1845	1597	1415	Positive
IT	381	TCS	525.95	520-519	543-545	426	344	300	Positive

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CORPORATE ACTIONS

Dividend

Name	Dividend	Per Share	Ex Date	Record/B.C. Date
ACC	Interim	10.00	30-Jul	31-Jul
SAIL	Final	1.30	30-Jul	1-Aug
CHAMBLFERT	Final	1.80	31-Jul	4-Aug
SESAGOA	Final	2.25	31-Jul	4-Aug
TATAMOTORS	Final	6.00	3-Aug	5-Aug
AMBUJACEM	Interim	1.20	3-Aug	5-Aug
UNITECH	Final	0.10	6-Aug	8-Aug
MRPL	Final	1.20	6-Aug	8-Aug
ZEEL	Final	2.00	17-Jul	10-Aug
CIPLA	Interim	2.00	10-Aug	12-Aug

RIGHT ISSUE

<u>Company</u>	<u>Right Ratio</u>	<u>Price</u>	<u>Record Date</u>	<u>Ex-Date</u>	<u>Remarks</u>

BUYBACKS

<u>Company</u>	<u>% of paid up</u>	<u>Price</u>	<u>Commencement</u>	<u>Ending</u>
DLF	9.8%	Max 600	17-Oct 2008	9-July 2009
India Info	10%	Max 43.20	18-Dec 2008	28-Nov 2009
Bosch Ltd.	25%	Max 4500	15-Dec 2008	23-Oct 2009
NB Ventures	6.29%	Max 170	6-Jan 2009	11-Dec 2009

OPEN OFFER

<u>Company</u>	<u>% of paid up</u>	<u>Price</u>	<u>Open</u>	<u>End</u>
GT Offshore		375	13-Aug	01-Sep

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EXPECTED RESULTS

Results Quarter Ended 30th June 09					
Date	Company Name	Sales(Q108)	Expected	Net profit(Q108)	Expected
30-Jul-09	Educomp Solution	92.1	154.3	16.77	38.87
30-Jul-09	Mercator Lines Ltd	4929	4683.667	759.03	709.667
30-Jul-09	Mahindra & Mahindra Ltd	3343.32	4277.48	159.3	337.79
30-Jul-09	Nagarjuna Construction Ltd	971.79	995.57	37.08	40
30-Jul-09	Steel Authority of India Ltd	11421.99	96926.8	1835.19	12019.73
30-Jul-09	Voltas	1059.37	1186.16	85.13	65.03
30-Jul-09	Patni	338.94	807.45	85.9	110.5
30-Jul-09	IOC Ltd	89148.97	61338.8	415.13	1580.8
30-Jul-09	Tata Chemicals	2192.35	1728.43	107.04	125.15
30-Jul-09	Financial Technologies Ltd	44	n/a	217.57	n/a
30-Jul-09	Jai Prakash Hydro	95.07	n/a	61.59	n/a
30-Jul-09	Reliance Infrastructure Ltd	2161.07	2514.8	252.54	326.6
30-Jul-09	SBIN	13799.2	7626.95	2412.87	1991.5
30-Jul-09	Moserbaer Ltd	478.93	n/a	-103.98	n/a
30-Jul-09	OFSS	462.8	737.2	99.46	174.7
30-Jul-09	DLF	1278.61	1505.63	818.48	420.1
30-Jul-09	India Bulls Real Estate	9.7	77.91	10.38	25.38
30-Jul-09	Sterling Biotech	276.94	n/a	57.12	n/a
30-Jul-09	GMR Infrastructure	n/a	n/a	n/a	n/a
30-Jul-09	Parsvnath	n/a	90.3	n/a	2.2
30-Jul-09	Bhushan Steel	n/a	n/a	n/a	n/a
30-Jul-09	Wockhard pharma	395.3	989.4	105.8	66.7
30-Jul-09	KS Oils	n/a	n/a	n/a	n/a
30-Jul-09	BEML	n/a	n/a	n/a	n/a
30-Jul-09	Ansal Infra	201.3	n/a	21.59	n/a
30-Jul-09	Tata Power co. Ltd	2113.33	1992.81	190.55	209.8
31-Jul-09	Aban Offshore Ltd	246.95	804.37	107.34	63.14
31-Jul-09	ABB Ltd	1637.63	n/a	131.81	n/a
31-Jul-09	Hindalco Industries Ltd	4862.19	3898.3	696.76	469.3
31-Jul-09	Indian Hotels Company Ltd	410.68	316.03	61.27	23.67
31-Jul-09	DCHL Ltd	199.46	n/a	60.98	n/a
31-Jul-09	NALCO	1593.7	1175.2	525.33	197.88
31-Jul-09	Unitech Ltd	739.82	1175.2	389.2	197.87
31-Jul-09	Suzlon Energy Ltd	1470.59	3976	119	128.42
31-Jul-09	Federal Bank Ltd	745.12	358.75	81.12	115.6
31-Jul-09	Reliance Capital Ltd	780.4	1511	356.35	381.35
31-Jul-09	Reliance Communications Ltd	3557.97	6404.28	349.38	1222.66
31-Jul-09	Syndicate Bank	2387.09	n/a	87.89	n/a
31-Jul-09	MTNL	1121.65	1050.43	156.09	1.966
31-Jul-09	DIVISLAB	263.5	303.6	94.3	89.7
31-Jul-09	GEShipping	n/a	383.3	n/a	94.8
31-Jul-09	Hotel Leela	2843.5	3860.5	272.8	469.3
31-Jul-09	Orchid Chemicals	n/a	315.7	n/a	10.1
31-Jul-09	Adlabs	n/a	n/a	n/a	n/a
31-Jul-09	ICSA	n/a	n/a	n/a	n/a
3-Aug-09	Rohta India	219.45	n/a	56.64	n/a

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Bombay Stock Exchange Limited (Cash & FO)

4, Brabourne Road ; 4th Floor ; Kolkata – 700001
Ph: +91 033 2225 3783/4/5/6/7
Fax :+91 033 2225 3788
research@kredent.com
www.kredent.com

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