

DAILY MARKET REVIEW

MARKET SUMMARY

A smart rally in the American markets and falling crude fuelled a nice recovery in our markets too. Sensex, reversing 5-day losing streak, surged 536 points to close at 13112, while Nifty shut shop at 3947, up 130 points. Dow surged 2.5% in yesterday's trade, the highest percentage gain after 1st April 2008. Crude, after falling more than 6\$ day before yesterday, further cooled off by 4\$ in yesterday's trade to touch 134.90 \$. Steel stocks tumbled on the back of media reports that the government is considering setting up a price band for steel prices to control inflation. Biocon announced Q1 profit of Rs. 14 cr, down 73% y-o-y against market expectation of Rs. 58 cr. The huge disappointment was on the back of mark-to-market provision of Rs. 26 cr. on the forex front. The stock shed 6% in today's trade.

Barring metal index, which was down 2%, all other indices closed in green. The lead was taken by Bankex and Capital Goods, which surged 6% each followed by Realty and power indices, up 5% and 4% respectively. HDFC, Maruti and JP Associate were top sensex gainers, up more than 9% each while Ranbaxy and Tata steel were in losers list, shedding 4% and 3% respectively. BSE Advance-Decline ratio stood at 1.4:1. Starting this week, government will declare inflation data every Thursday at 5:00 pm instead of mid-day every Friday.

MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
NIFTY	3823.15	3968.75	3823.15	3947.20	130.50	3.41
SENSEX	12909.57	13150.35	12843.79	13111.85	536.05	4.26
MIDCAP	5122.05	5216.24	5122.05	5155.34	67.06	1.32
SMLCAP	6357.21	6441	6357.21	6387.12	62.67	0.99
BSE-100	6731.12	6847.79	6693.66	6814.5	233.83	3.55
BSE-200	1575.08	1602.25	1567.18	1593.29	50.88	3.30
BSE-500	4994.18	5074.79	4970.7	5045.27	150.22	3.07

SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
BANKEX	5568.01	5762.91	5568.01	5727.60	327.36	6.06
CG	10440.58	10819.06	10353.13	10762.01	601.48	5.92
REALTY	4352.15	4473.48	4333.89	4428.02	208.90	4.95
POWER	2276.49	2308.18	2237.52	2302.77	92.89	4.20
AUTO	3404.78	3549.22	3404.78	3535.78	141.29	4.16
OIL&GAS	8776.92	8899.55	8676.32	8852.08	263.69	3.07
IT	3656.76	3704.37	3634.18	3675.20	108.22	3.03
TECK	2847.96	2887.70	2834.94	2864.80	80.30	2.88
FMCG	1921.06	1960.41	1909.19	1941.94	44.48	2.34
PSU	5844.49	5948.31	5792.29	5866.67	113.97	1.98
CD	3391.56	3473.77	3387.40	3440.60	49.37	1.46
HC	4010.48	4045.60	3942.50	3976.28	4.87	0.12
METAL	12208.84	12381.35	11518.80	11697.30	-238.62	-2.00

SENSEX MOVERS

TOP GAINER

Company	Price	Gain %
HDFC	1888.70	9.78
MARUTI	599.70	9.46
JAIPRAK ASSO	149.05	9.19
DLF	427.20	8.44
SBI	1227.05	7.75

TOP LOSERS

Company	Price	Loss %
RANBAXY	452.20	-3.93
TATA STEEL	607.40	-2.92

GROUP A MOVERS

TOP GAINER

Company	Price	Gain %
IVRCL INFRA	295.00	14.16
UNI.BREW (HOL)	228.45	10.55
ESSAR SHIPPING	96.05	9.96
H D F C	1888.70	9.78
MARUTI UDYOG	599.70	9.46

TOP LOSERS

Company	Price	Loss %
BIOCON	352.20	-6.38
S A I L	119.85	-5.78
STERLITE IND	608.35	-5.64
NALCO	336.65	-4.74
ABG SHIPYARD	320.80	-4.08

TOP TRADED SENSEX STOCKS

Company	Turnover (Rs Cr)
RANBAXY	316.58
RELIANCE	221.47
L&T	176.65
REL INF	169.71
TATA STEEL	139.27

TURNOVERS (Rs CR)

Segment	Today	Yesterday
BSE Cash	4865.47	4611.44
NSE Cash	11707.44	11978.66
NSE F&O	46300.96	45738.28
Total	62873.87	62328.38

MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
1536	1081	74	2691

CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	1	64	11	21	2	23	122
Lower Circuit	0	77	8	21	3	36	145
Total	1	141	19	42	5	59	267

BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
17-Jul	WEAROLOGY	SOPHIA GROWTH A SHARE CLASS	Buy	200000	73.00	3.85

BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
17-Jul	BASF INDIA	INDIA DIVERSIFIED (MAURITIUS)	BUY	142000	291.2	0.5
17-Jul	BASF INDIA	DEUTSCHE SECURITIES MAURITIUS	SELL	172975	286.1	0.6
17-Jul	PRIME SECURITIES	CITIGROUP GLOBAL MARKETS MAURI	SELL	250000	35.9	0.9
17-Jul	WEBEL SL ENERGY	SOHAN LAL AGARWAL	BUY	50337	214.9	0.7
17-Jul	WEBEL SL ENERGY	MORGAN STANLEY MAURITIUS CO	SELL	73150	215.0	0.9

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