

# DAILY ROUND-UP

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Shriram Market Analysis  
 & Research Team

## Indian Market

INDICES	Close	Previous
S&P CNX Nifty	5259.90	5233.95
SENSEX	17584.87	17509.80

## Sectoral Indices

INDICES	Close	Previous
BSE IT	5404.06	5393.92
BSE BANK	9900.51	9907.15
BSE FMCG	2786.82	2800.88
BSE PSU	9736.06	9656.12
BSE METAL	18040.37	17920.83

## Asian Market

INDICES	Close	Previous
Nikkei225	10907.68	10735.03
HangSeng	21716.95	21748.6
StraitTimes	2909.52	2888.38
Shanghai	3215.55	3172.66
Kospi	1685.77	1671.41

## Exchange Turnover (Rs. in Crore)

INDICES	Current	Previous
NSE Cash	16838.48	17094.13
NSE F&O	56287.13	70881.61

## Previous FII Positions

ACTIVITIES	Cash	F&O
NET BUY	-	-
NET SELL	285.84	206.22

## Top Gainers

INDICES	Close	Previous
RCOM	182.85	175.55
ABB	852.00	819.30
SIEMENS	660.25	638.25
RELIANCE	1121.05	1088.60

## Top Losers

INDICES	Close	Previous
HINDUNILVR	256.30	262.50
TATAPOWER	1455.00	1489.85
HCLTECH	370.00	377.95
SUZLON	91.25	93.00

The markets opened on a positive note on the back of positive global cues. The rally was brought about by Realty, Oil & Gas, Banking and Pharma stocks while profit booking was clearly noticed in IT stocks. The Broader market indices outperformed the market. Markets extended early gains in the mid morning session and Nifty was firm above 5250. Sustained buying was witnessed in Oil & gas, Metal, Banking sectors while IT and FMCG sectors was under selling pressure resulting in the markets to come down from the initial higher levels. The Markets were choppy in the afternoon session as inflation data was released revealing that inflation stood at 7.31% for the month of December'2009. In late afternoon all the Bse Sectoral indices were up including IT which recovered from the early losses. The only exception being FMCG which was marginally down. Finally markets did end with smart gains with Nifty closing above 5250. RCOM, ABB, SIEMENS, RELIANCE were among the Nifty toppers while HINDUNILVR, TATAPOWER, HCLTECH, SUZLON were among the Nifty losers.

## Economic News

- ❖ Crude Oil traded at US\$ 79.90 per barrel and Rupee traded at Rs.45.61 against each US\$.

## Corporate News

- ❖ **Punj Lloyd ( NSE : PUNJLLOYD)** has secured an offshore EPC contract from PTT Public Company Limited, a Thailand state-owned oil and gas major, for Platform Compression Facilities in the Gulf of Thailand for a value of Rs. 574 Crores
- ❖ **BHEL ( NSE : BHEL)** has secured an order worth Rs. 200 crores for the supply of 4.53 lakh 420 kN Anti-fog Porcelain Disc Insulators from PowerGrid.
- ❖ **Supreme Industries (NSE : SUPREMEIND)** in its meeting on 13 January 2010 has declared interim dividend at the rate of Rs 5 per share (50%) of Rs 10 each.
- ❖ **Era Infra Engineering (NSE : ERAINFRA)** has announced that the company in association with OJSC-SIBMOST, has bagged the prestigious orders from National Highways Authority of India (NHAI) for an estimated cost Rs 1659 crore.

Global News

- ❖ **Euro-zone industrial production up in Nov.**  
Industrial production in the 16-nation euro zone saw a monthly rise of 1% in November, for a decline of 7.1% on YoY basis. October output fell 0.3% on the month and declined 10.9% on YoY basis.
- ❖ **Australia's jobless rate falls marginally lower**  
Australia's jobless rate eased slightly in December, as the nation's unemployment rate, on a seasonally-adjusted basis, fell 0.1% to 5.5% from a revised 5.6% in November.
- ❖ **Japan's core machinery orders slips in Nov.**  
Japan's core machinery orders, seen as a key leading indicator for capital expenditures there, fell 11.3% during November. The result was well below estimates.

Market Talk

**Inflation at 7.31%**

The annual rate of inflation stood at 7.31% for the month of December'2009 as compared to 4.78 % on MoM basis and 6.15% on YoY basis. Minerals items up by 0.2% at 588.1 (MoM) Fuel group surged by 0.1% at 345.2 (MoM) Primary articles rose by 1.2% at 284.1(MoM) Manufactured products stood up by 0.2% at 211.5 (MoM) Food items up by 0.5% at 288.4 (MoM) Non-food items also rose 3.9% at 249.5 (MoM) The Wholesale Price Index for 'All Commodities' for the month of December,2009 rose by 0.4 percent to 246.5 (Provisional) from 245.4 (Provisional) for the previous month. For the month of October, 2009 the final wholesale price index for 'All Commodities' stood at 242.5 as compared to 242.2 and annual rate of inflation based on final index stood at 1.46% as compared to 1.34% percent reported earlier.

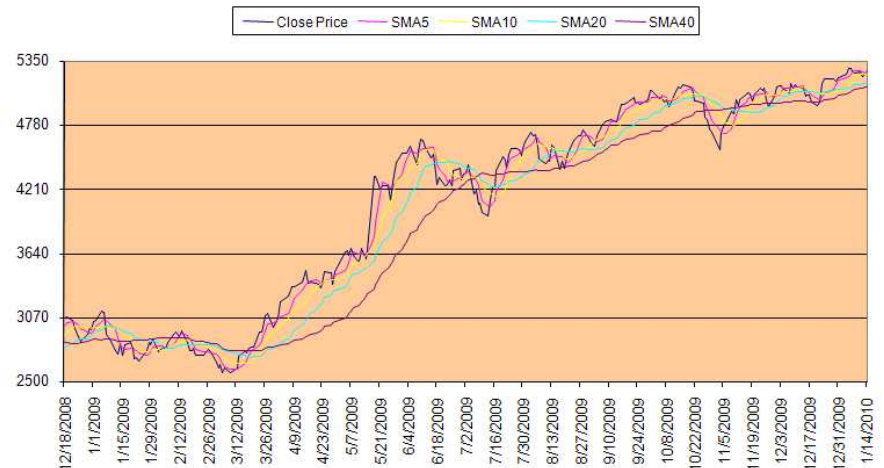
Result Announcement

COMPANY	PERIOD	PROFIT AFTER TAX			NET SALES		
		CURR	PREV	% CHN	CURR	PREV	% CHN
BAJAJ HOLDINGS & INVESTMENT LTD	Q3FY10(YOY)	114.9	8.02	1332.67%	131.25	13.37	881.68%
TEXMACO LTD	Q3FY10(YOY)	22.23	15.43	44.07%	238.69	166.38	43.46%
INFOMEDIA 18 LTD	Q3FY10(QOQ)	-12.88	-19.56	34.15%	23.04	23.33	-1.24%
GALLANTT METAL LTD	Q3FY10(YOY)	9.99	0.46	2071.74%	118.82	69.13	71.88%
SUPREME INDUSTRIES LTD	Q3FY10(YOY)	35.92	-1.49	2510.74%	484.14	351.42	37.77%
TATA METALIKS LTD	Q3FY10(YOY)	20.34	-218.31	109.32%	275.48	174.31	58.04%
USHA MARTIN LIMITED	Q3FY10(YOY)	18.42	26.74	-31.11%	439.85	512.93	-14.25%
FINOLEX INDUSTRIES LTD	Q3FY10(YOY)	11.34	-60.92	118.61%	453.23	461.68	-1.83%
JINDAL SAW LIMITED	Q3FY10(YOY)	170.1	86.65	96.31%	1371.04	1548.13	-11.44%

COMPANY	PERIOD	PROFIT AFTER TAX			NET INTEREST INCOME		
		CURR	PREV	% CHN	CURR	PREV	% CHN
The South Indian Bank Ltd	Q3FY10(QOQ)	62.46	54.2	15.24%	171.79	146.23	17.48%

Index Chart

Index Snapshot



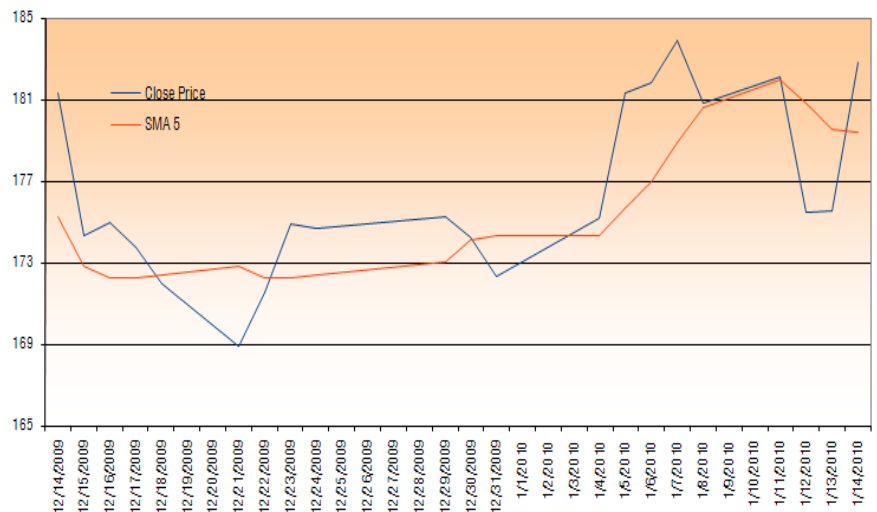
- ❖ The markets opened on a positive note on the back of positive global cues. The rally was brought about by Realty, Oil & Gas, Banking and Pharma stocks while profit booking was clearly noticed in IT stocks. The Broader market indices outperformed the market. Markets extended early gains in the mid morning session and Nifty was firm above 5250. Sustained buying was witnessed in Oil & gas, Metal, Banking sectors while IT and FMCG sectors were under selling pressure resulting in the markets to come down from the initial higher levels. The Markets were choppy in the afternoon session as inflation data was released revealing that inflation stood at 7.31% for the month of December'2009. In late afternoon all the Bse Sectoral indices were up including IT which recovered from the early losses, the only exception being FMCG which was marginally down. Finally markets did end with smart gains with Nifty closing above 5250 led by Oil & Gas, CD, Metal while Bank, Realty, FMCG were down. Small & Midcap indices outperformed.
- ❖ BSE Midcap Index ended higher 59.81 points or 0.86% to 7029.65 while Smallcap Index closed higher 105.82 points or 1.20% at 8934.87
- ❖ NSE Nifty touched an intra-day high of 5272.85 and low of 5232.50 while BSE Sensex touched an intra-day high of 17628.04 and low of 17525.71
- ❖ Finally Nifty ended higher by 25.95 points at 5259.90 and Sensex closed higher by 75.07 points at 17584.87
- ❖ RCOM, ABB, SIEMENS, RELIANCE, WIPRO were the major gainers where as HINDUNILVR, TATAPOWER, HCLTECH, SUZLON, RELCAPITAL were the major losers among the Nifty stocks.
- ❖ Nifty may find support at around 5200 and resistance at around 5290

INDEX	LTP	PREVIOUS CLOSE	%CHANGE
SENSEX	17584.87	17509.80	0.43%
S&P CNX NIFTY	5259.90	5233.95	0.50%
CNX NIFTY JUNIOR 1	0787.05	10690.25	0.91%
CNX IT	6105.30	6075.80	0.49%
BANK NIFTY	8910.80	8926.10	-0.17%
CNX 100	5198.10	5169.10	0.56%
S&P CNX DEFTY	3999.15	3978.75	0.51%
S&P CNX 500	4450.45	4415.60	0.79%
CNX MIDCAP	7766.15	7686.85	1.03%
NIFTY MIDCAP 50	2786.10	2756.15	1.09%

Top Gainer

Market Gainer

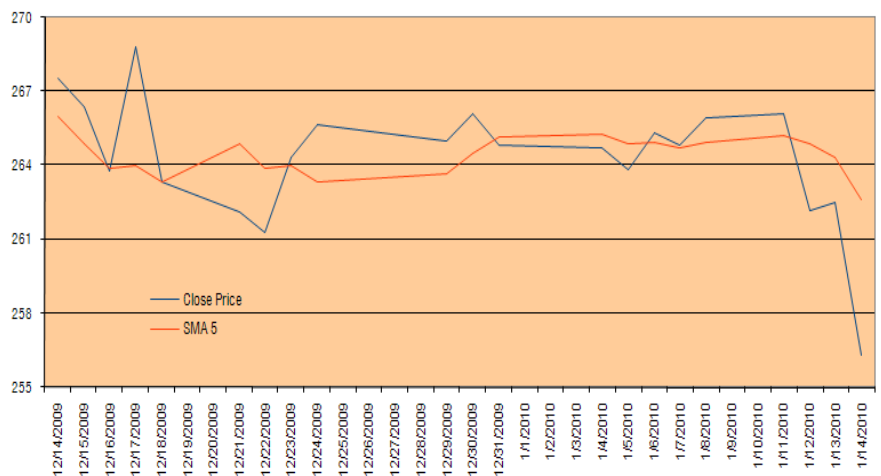
- ❖ RCOM finished as the top performer among the Nifty stocks due to position build up. The scrip touched an intra-day high of Rs 184.20 and low of Rs 175.65. The total traded volume for the script was 7227593 shares. It closed up by 4.16% to Rs 182.85
- ❖ Immediate short-term resistance for the counter exists at around Rs 192.00



Top Loser

Market Loser

- ❖ HINDUNILVR finished as worst performer. The scrip touched an intra-day high of Rs 263.60 and low of Rs 255.30. The total traded volume for the scrip was 3583983 shares. It closed down by 2.36% to Rs 256.30
- ❖ Immediate short-term support for the counter exists at around Rs 240.00



Derivative Watch

- ❖ Nifty January series futures witnessed long position build-up. Open Interest has been increased by 25007 contracts at the end of the day.
- ❖ Long position build up for the January series has been observed in RELIANCE, BHARTIARTL, RCOM, TATASTEEL, GMRINFRA, INFOSYSTCH, CAIRN, JSWSTEEL, WIPRO, BHARATFORG, SIEMENS, ABB & STERLINBIO
- ❖ Short build for the January series has been witnessed in ICICIBANK, SBIN, SUZLON, DLF, LT, TATAMOTORS, RELCAPITAL, RELINFRA, ESSAROIL, HINDUNILVR, JINDALSTEL, HDFCBANK, TCS, BPCL, NATIONALUM, HCLTECH & UNIONBANK
- ❖ Position unwinding for January series has been observed in STER, CENTURYTEX, KOTAKBANK, HCC, AUROPHARMA, PETRONET, ANDHRABANK, FEDERALBNK, UCObANK, IFCI, BAJAJHIND, BALRAMCHIN, ISPATIND, SAIL, ABAN, HINDALCO, TATATEA & GTOFFSHORE

Derivative Watch

SYMBOL	Expiry Date	LTP	Prev. LTP	Change in	(%) change	Open Interest*	Prev. Open Interest	Change in*	(%) change
NIFTY	28-Jan-10	5261.9	5243	18.9	0.36%	523226	498219	25007	5.02%
RELIANCE	28-Jan-10	1118.7	1091.85	26.85	2.46%	43432	41398	2034	4.91%
BHARTIARTL	28-Jan-10	318.8	318.4	0.4	0.13%	37054	35632	1422	3.99%
RCOM	28-Jan-10	183.6	176.25	7.35	4.17%	36669	35988	681	1.89%
TATASTEEL	28-Jan-10	646.3	640.8	5.5	0.86%	16523	15979	543.99	3.40%
GMRINFRA	28-Jan-10	68.15	66.65	1.5	2.25%	15374	15128	246	1.63%
INFOSYSTCH	28-Jan-10	2682	2677.45	4.55	0.17%	14702	13875	827	5.96%
CAIRN	28-Jan-10	295.75	294.45	1.3	0.44%	11415	10255	1160	11.31%
JSWSTEEL	28-Jan-10	1183.7	1144.15	39.55	3.46%	8731	6992	1739	24.87%
WIPRO	28-Jan-10	735.15	717.9	17.25	2.40%	4864	3466	1398	40.33%
BHARATFORG	28-Jan-10	299.7	285.95	13.75	4.81%	2372	2062	310	15.03%
SIEMENS	28-Jan-10	658	634.6	23.4	3.69%	1883	1475	408	27.66%
ABB	28-Jan-10	852	820.15	31.85	3.88%	2642	2385	257	10.78%
STERLINBIO	28-Jan-10	110.85	100.9	9.95	9.86%	1076	969	107	11.04%
ICICIBANK	28-Jan-10	838.6	841.6	-3	-0.36%	33534	31472	2062	6.55%
SBIN	28-Jan-10	2168.4	2181.4	-13	-0.60%	31440	29082	2358	8.11%
SUZLON	28-Jan-10	91.6	93.4	-1.8	-1.93%	20640	20031	609	3.04%
DLF	28-Jan-10	384.55	388.75	-4.2	-1.08%	19663	19307	356	1.84%
LT	28-Jan-10	1670.9	1679.35	-8.45	-0.50%	16648	16139	509	3.15%
TATAMOTORS	28-Jan-10	778	782.8	-4.8	-0.61%	16569	16168	401	2.48%
RELCAPITAL	28-Jan-10	893.25	913	-19.75	-2.16%	16096	16016	80	0.50%
RELIINFRA	28-Jan-10	1128.25	1144.05	-15.8	-1.38%	16074	15849	225	1.42%
ESSAROIL	28-Jan-10	153.6	153.9	-0.3	-0.19%	14872	14809	63	0.43%
HINDUNILVR	28-Jan-10	257.05	262.85	-5.8	-2.21%	13790	12474	1316	10.55%
JINDALSTEL	28-Jan-10	696.8	703.3	-6.5	-0.92%	11563	10740	823	7.66%
HDFCBANK	28-Jan-10	1689	1695.2	-6.2	-0.37%	8922	8433	489	5.80%
TCS	28-Jan-10	781.1	786.3	-5.2	-0.66%	5653	4473	1180	26.38%
BPCL	28-Jan-10	629	632.7	-3.7	-0.58%	4915	4467	448	10.03%
NATIONALUM	28-Jan-10	452.9	461	-8.1	-1.76%	3671	3229	442	13.69%
HCLTECH	28-Jan-10	371.55	378.75	-7.2	-1.90%	1702	1399	303	21.66%
UNIONBANK	28-Jan-10	263.35	267.9	-4.55	-1.70%	1689	1550	139	8.97%
STER	28-Jan-10	874	865.9	8.1	0.94%	10610	10814	-204	-1.89%
CENTURYTEX	28-Jan-10	572	561.25	10.75	1.92%	5501	5651	-150	-2.65%
KOTAKBANK	28-Jan-10	826	814.55	11.45	1.41%	4291	4346	-55	-1.27%
HCC	28-Jan-10	157.7	154.8	2.9	1.87%	2743	2777	-34	-1.22%
AUROPHARMA	28-Jan-10	905.95	874.75	31.2	3.57%	2433	2473	-40	-1.62%
PETRONET	28-Jan-10	82.65	81.2	1.45	1.79%	1742	1799	-57	-3.17%
ANDHRABANK	28-Jan-10	107.7	106.35	1.35	1.27%	1669	1744	-75	-4.30%
FEDERALBNK	28-Jan-10	256	246.7	9.3	3.77%	1492	1545	-53	-3.43%
UCOBANK	28-Jan-10	55.75	55.4	0.35	0.63%	1458	1490	-32	-2.15%
IFCI	28-Jan-10	54.4	55.1	-0.7	-1.27%	11364	11673	-309	-2.65%
BAJAJHIND	28-Jan-10	223	226.25	-3.25	-1.44%	10930	10951	-21	-0.19%
BALRAMCHIN	28-Jan-10	135.5	136	-0.5	-0.37%	7043	7088	-45	-0.63%
ISPATIND	28-Jan-10	22.7	23	-0.3	-1.30%	6925	7121	-196	-2.75%
SAIL	28-Jan-10	240.6	242.2	-1.6	-0.66%	5701	5887	-186	-3.16%
ABAN	28-Jan-10	1499.7	1516.4	-16.7	-1.10%	5627	5808	-181	-3.12%
HINDALCO	28-Jan-10	171	171.55	-0.55	-0.32%	5022	5118	-96	-1.88%
TATATEA	28-Jan-10	1039	1046.45	-7.45	-0.71%	1624	1627	-3	-0.18%
GTOFFSHORE	28-Jan-10	483.5	486.6	-3.1	-0.64%	1448	1496	-48	-3.21%

\* Provisional Data

Bulk Deals

DATE	SCRIP NAME	BUYER/SELLER	BUY/SELL	QNTY.	AVERAGE RATE
01/13/10	MSKPROJ	LANDMARK CAPITAL MARKETS LTD	BUY	125000	128.2
01/13/10	NATNLSTEEL	PVT. LTD S.R CREDIT	BUY	240000	24.68
01/13/10	NUTEK	NETESOFT INDIA LIMITED	BUY	250000	44.22
01/13/10	MSKPROJ	TRANSGLOBAL SECURITIES LTD.	BUY	1500	125.72
01/13/10	MSKPROJ	VISARIA SECURITIES PRIVATE LIMITED	BUY	105000	127.21
01/13/10	STAR	RELIANCE CAPITAL ASSET MANAGEMENT LTD.	BUY	380000	235.5
01/13/10	TNPL	JAIDEEP HALWASIYA	BUY	527500	86.07
01/13/10	ORIENTALT	SHASHI KANT AGARWAL	BUY	76762	20.31
01/13/10	WWIL	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	15392	20.97
01/13/10	SHILPAMED	ICICI PRUDENTIAL TRUST LIMITED	BUY	181865	200
01/13/10	AUTOLITIND	EMERGING INDIA FOCUS FUNDS	BUY	96292	36
01/13/10	CINEMAX	MERRILL LYNCH CAPITAL MARKETS ESPANA SA SV	BUY	309782	75.09
01/13/10	ISPATIND	JAYPEE CAPITAL SERVICES LTD.	BUY	267450	22.42
01/13/10	BIRLACOT	JMP SECURITIES PVT LTD	BUY	1948726	1.34
01/13/10	CELESTIAL	R.B.K. SHARE BROKING LTD.	BUY	10663	42
01/13/10	MASTEK	AMANSA INVESTMENTS LIMITED	BUY	231824	399.94
01/13/10	LAOPALA	M/S TASHA TRAVELS Pvt. Ltd.	BUY	83533	40.06
01/13/10	RAMSARUP	ASHISH JHUNJHUNWALA	SELL	300000	88.18
01/13/10	THINKSOFT	PRASANN SHARES & SERVICES PRIVATE LIMITED	SELL	51000	409.7
01/13/10	STAR	ZENITH PHARMACEUTICALS LTD.	SELL	1000000	235.67
01/13/10	SUBEX	BARCLAYS CAPITAL MAURITIUS LIMITED	SELL	397420	78.17
01/13/10	MSKPROJ	GANDHI SECURITIES & INVESTMENT PVT. LTD.	SELL	118000	126.84
01/13/10	UNIENTER	HDFC PRUDENCE FUND	SELL	150000	30.98
01/13/10	TODAYS	PAM PHARMACEUTICAL & ALLIED MACHINERYCO PVTLTD	SELL	105000	25.78
01/13/10	AUTOLITIND	RHOES DIVERSIFIED	SELL	100000	36
01/13/10	ORIENTALT	NAM SECURITIES LTD.	SELL	73000	19.38
01/13/10	NUTEK	YAMINI SUPPLIERS PRIVATE LIMITED	SELL	500000	44.06
01/13/10	NATNLSTEEL	PREMCHAND DHARAMPAL	SELL	245000	24.68
01/13/10	MASTEK	BAJAJ ALLIANZ LIFE INSURANCE COMPANY LIMITED	SELL	200000	400
01/13/10	SHILPAMED	STRATEGIC VENTURES FUND (MAURITIUS) LIMITED	SELL	700000	200.07
01/13/10	BIRLACOT	MONEYWISE FINANCIAL SERVICES PRIVATE LTD	SELL	15000000	1.3
01/13/10	SASKEN	NORTEL NETWORKS MAURITIUS LTD	SELL	161000	185.17

Forthcoming Events

□ ANNUAL/QUARTERLY RESULTS OF THE FOLLOWING COMPANIES DUE ON 17/01/2010

❖ NUCLEUS SOFTWARE EXPORTS LIMITED

□ CORPORATE ACTION OF THE FOLLOWING COMPANIES DUE ON 17/01/2010

❖ NO RECORDS

Investment Picks

□ SCRIPT NAMES

**LARGE CAP PICKS**

Reliance Industries  
DLF  
HDFC  
Suzlon Energy  
Sterlite Industries  
Jindal Steel & Power  
Axis bank  
Unitech  
Adani Enterprises  
Crompton Greaves

**MIDCAP PICKS**

Biocon  
Sintex Industries  
BRFL  
GE Shipping  
Indian Hotel  
Texmaco  
Everonn System  
Balrampur Chini  
Century Textiles  
Bharti Shipyard  
Bata India  
Arshiya International  
Fortis Healthcare  
GVKPIL  
Patel Engineering  
ING Vysya Bank  
IFCI



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