

Morning Market

Oct 05, 2009



News Analytics		
News	Sector	Stock
Axis Bank cancels Great offshore Oil Rig funding		Great Offshore
IT co's expect big deal from Nordic region	IT	
Grasim: cement business demerger -Board approves demerger of cement business into arm Samruddhi -Grasim shareholders to get 1 share of Samruddhi for every 1 held		Grasim Industries
Cement numbers -AV Birla Group September cement sales up 15.8% at 2.77 MT (million tonnes) YoY -ACC September cement sales At 1.63 mt versus 1.67 mt (YoY)		Grasim, Ultratech & ACC
Tata Motors September -Total sales at 52,513 units; up 6% (YoY)		Tata Motors
3G auction may get delayed, govt likely to miss the December 7 deadline	Telecom	
BSNL, MTNL join race for Zain Telecom, write their willingness to Vavasi group		MTNL
Wockhardt receives US FDA approval for prostate drug Alfuzosin		Wockhardt

US

OTHER REGIONS

Indonesia's central bank will probably keep its benchmark interest rate unchanged for a second straight month amid signs of a pickup in consumer prices

DATA RELEASES				
<u>TIME</u>	<u>COUNTRY</u>	<u>DATA</u>	<u>SURVEY</u>	<u>PRIOR</u>

CORPORATE EVENTS		
<u>Date</u>	<u>Company</u>	<u>Event</u>

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TRACKING MARKETS

Index	Last price	1 D Chng	5 D Chng
Sensex	17134.55	0.05	2.48
Nifty	5083.40	-0.01	2.28
Dow Jones	9487.67	-0.23	-1.84
FTSE (UK)	4988.70	-1.17	-1.84
Nasdaq	2048.11	-0.46	-2.05
Nikkei	9714.06	-0.18	-2.95
Hang Seng	20389.39	0.06	-3.03

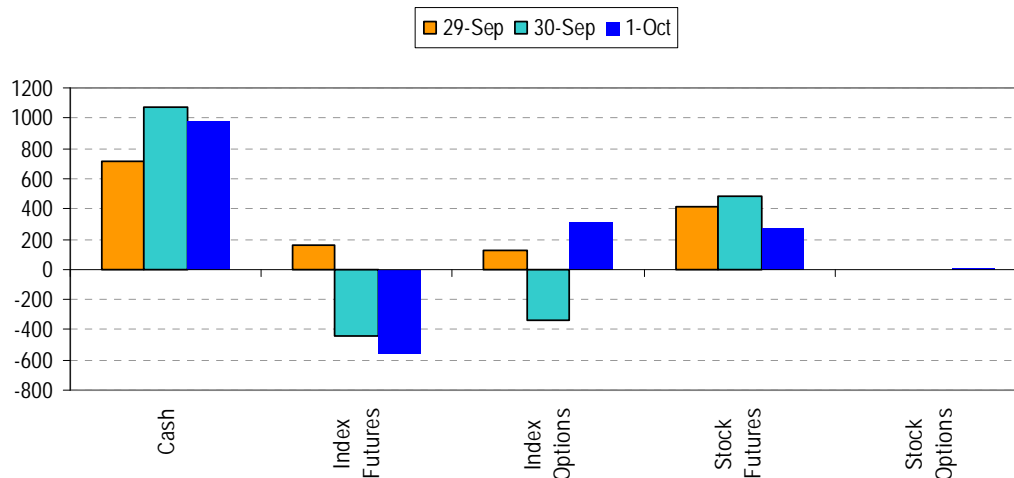
Index	Last price	1 D Chng	5 D Chng
Shipping	1858.38	-1.63	-3.68
Baltic Dry Index	2357.00	3.20	7.97
Coal	3992.60	-2.04	-3.76
Steel	3339.85	-1.62	-3.76
Water	1894.74	-0.29	-4.06
Nuclear	2421.15	0.01	-3.88
Timber & Forestry	928.09	0.08	-3.35

COMMODITIES AND CURRENCIES

	Last price	1 D Chng	5 D Chng
Gold (MCX)	15633.00	0.19	0.22
Silver (MCX)	26066.00	-0.84	-0.63
Crude (Nymex)	69.80	-0.21	4.43
Copper (MCX)	285.85	-1.24	-0.99
Zinc (MCX)	90.30	-0.93	2.50

Currency	Last price	1 D Chng	5 D Chng
INR	47.61	0.30	0.78
Euro	1.46	0.40	0.08
Yen	89.84	-0.04	-0.23

FII ACTIVITIES



FII Figures (Cr)	
1-Oct	
Cash	976.46
Index Futures	-552.56
Index Options	311.13
Stock Futures	271.81
Stock Options	5.48

Cumulative FII positions as percentage of total gross market position in the derivative segment as October 01, 2009 is 35.35%

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1 DAY CHANGE

Sector	India (t-1)	Asia (t)	US(t)	EU(t)	Brazil(t)
Automobiles	-1.98	-0.11	-	-1.33	-
Banks	0.53	0.84	-	-2.21	0.14
Chemicals	-1.09	-0.38	-0.79	-1.51	-0.91
Construction and Materials	0.09	0.18	-1.99	-1.86	-1.12
Electricity	0.84	0.38	-0.86	-2.31	1.29
Fixed Line Communication	-0.74	-0.01	-0.54	-0.80	1.44
Financials	2.04	2.56	-0.38	-1.93	0.66
Retailers	-1.97	-0.70	-0.63	-0.94	0.57
Engineering	-0.79	-0.44	-0.90	-2.12	-
Metals	0.04	0.33	-0.43	-2.12	2.25
Media	-0.99	0.17	0.00	-2.65	0.75
Mining	0.50	0.91	-0.74	-1.65	-
Mobile Telecommunicatios	3.08	0.59	4.55	-1.82	3.20
Oil and Gas Producers	-0.09	-0.34	-0.51	-1.27	-0.05
Pharmaceutical	-0.98	1.13	0.00	-0.42	-
Real Estate	0.32	0.19	-1.12	-3.14	4.26
Software	1.01	3.07	0.10	-1.55	-

STRONG

WEAK

5 DAY CHANGE

Sector	India (t-1)	Asia (t)	US(t)	EU(t)	Brazil(t)
Automobiles	-1.11	-3.71	-5.12	-1.51	-
Banks	4.93	-1.73	-2.71	-3.54	4.98
Chemicals	3.49	-4.46	-2.78	-1.92	-3.19
Construction and Materials	-0.32	-3.91	-4.63	-2.62	2.55
Electricity	1.04	-2.35	-2.59	-2.02	0.37
Fixed Line Communication	0.00	-4.72	-1.14	-2.12	-0.10
Financials	3.61	-1.76	-1.47	-3.80	5.83
Retailers	-1.86	-1.86	-1.29	-3.51	0.98
Engineering	-1.67	-4.02	-4.31	-5.05	-
Metals	-1.72	-5.25	-3.67	-3.75	0.60
Media	3.10	-2.64	1.08	-2.57	6.89
Mining	-2.98	-3.43	-2.65	-4.79	-
Mobile Telecommunicatios	1.35	-4.01	-1.01	-2.67	6.09
Oil and Gas Producers	1.27	-3.40	-2.57	-2.40	0.16
Pharmaceutical	7.74	-2.40	-0.35	-0.10	-
Real Estate	1.24	-1.83	-4.54	-2.76	-1.72
Software	0.89	-2.15	-1.77	-0.98	-

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TECHNICALS

Sector	Prev Expiry	Stock	Close	S	R	30DMA	100DMA	200DMA	Trend
Nifty Spot	4,987	-	5,083.40	5030	5130-5135	4790	4494	3744	Positive
Nifty Fut	4,987	-	5,069.85			4794	4497	3743	Positive
Bank	2,167	SBI	2,210.75	2150	2300	1919	1771	1463	Positive
Bank	860	ICICI	926.60	885	930	802	743	573	Positive
Bank	1,624	HDFC	1,644.30	1600	1675	1507	1453	1210	Positive
Bank	399	Bank of India	402.10	395	415-417	355	335	289	Positive
Bank	920	Axis Bank	1,009.30	975	1045	911	833	640	Positive
Financials	915	Rel Cap	912.15	894	925	884	878	660	Positive
Financials	56	IFCI	55.80	53.5	57-57.2	56	50	36	ST Negative
Real Estate	424	DLF	439.80	425	450	413	370	287	Positive
Real Estate	325	HDIL	335.20	329-330	340-341	311	271	189	Positive
Oil and Gas	2,101	Reliance	2,174.35	2100	2220	2065	2055	1729	Positive
Oil and Gas	131	RPL	-	127	134	126	127	107	Positive
Oil and Gas	1,150	ONGC	1,182.20	1130	1225-1230	1171	1107	920	Positive
Oil and Gas	155	Essar Oil	158.60	153	160	150	151	122	Positive
Oil and Gas	259	Cairn	261.25	250-251	268	259	241	206	Positive
Oil and Gas	87	RNRL	87.30	84	90	86	83	67	Positive
Metals	513	Tata Steel	510.80	495	517	470	428	319	Positive
Metals	173	SAIL	169.00	160	174	167	163	126	Positive
Metals	759	Sterlite	779.00	750	790	711	642	476	Positive
Metals	129	Hindalco	126.80	118	130	117	97	74	Positive
Infra	2,246	BHEL	2,350.80	2300	2400	2271	2181	1813	Positive
Infra	237	JP Associates	239.40	225	247	229	214	150	Positive
Infra	1,658	LT	1,665.20	1635	1700	1597	1486	1110	Positive
Sugar	194	Renuka	194.70	190	200-201	193	160	121	Positive
Sugar	178	Bajaj Hind	181.00	171	190	179	177	118	Positive
Sugar	103	Praj	101.55	99	105	100	96	77	Positive
FMCG	233	ITC	232.55	225	238	231	215	197	Positive
FMCG	260	HUL	265.40	260	268	263	260	253	Positive
Fertilizers	53	Chambal	55.60	53	57	53	58	49	Positive
Fertilizers	33	Nagarjuna	33.55	32.5	35	34	36	27	ST Negative
Power	1,215	Rel Infra	1,207.00	1170	1250	1170	1162	868	Positive
Power	212	NTPC	210.50	205	215	208	207	194	Positive
Power	166	Rpower	166.70	164	170	163	167	-	Positive
Power	92	Suzlon	92.25	90	95	95	99	75	ST Negative
Power	1,312	Tata Power	1,289.65	1250	1353	1302	1193	981	ST Negative
Tele Com	305	Rcom	318.50	310	325-326	287	287	239	Positive
Tele Com	419	Bharti	435.10	425	450	418	410	370	Positive
Pharma	394	Ranbaxy	408.15	395	420	345	288	241	Positive
IT	2,284	Infosys	2,336.75	2300	2360	2216	1927	1604	Positive
IT	603	TCS	629.85	600	650	558	457	359	Positive

Morning Market



CORPORATE ACTIONS

Dividend

Name	Dividend	Per Share	Ex Date	Record/B.C. Date	Remarks
PANTALOONR	Interim	0.60		27-Nov	

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>
India Info	10%	Max 43.20	18-Dec 2008	28-Nov 2009
Bosch Ltd.	25%	Max 4500	15-Dec 2008	23-Oct 2009

OPEN OFFER

<u>Company</u>	<u>% of paid up</u>	<u>Price</u>	<u>Open</u>	<u>End</u>

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