

US markets end flat and European markets advance

- Most US stocks declined, pulling the Standard & Poor's 500 Index down from a 19-month high, as concern that proposed legislation will hurt banks overshadowed improving earnings at Caterpillar Inc. and Whirlpool Corp. The S&P 500 and NASDAQ declined 0.43% and 0.30%, respectively, while Dow Jones advanced 0.01%. JPMorgan Chase & Co. and Goldman Sachs Group Inc. helped lead financial shares lower as Congress prepared to vote on whether to open debate on the financial overhaul. Citigroup Inc. tumbled 5.1% on the Treasury Department's plan to sell as many as 1.5 billion shares
- The FTSE 100 rose for a second day as mining companies climbed with metal prices and Invensys Plc led industrial shares higher. The FTSE 100 Index added 30.20 points, or 0.53%, and ended at 5,753.85. Antofagasta Plc and Kazakhmys Plc advanced more than 3% as copper rose to a one-week high in London. Invensys surged 4.3% as Whirlpool Corp. raised its earnings forecast. Weir Group Plc jumped to a 21-year high as the world's largest maker of pumps for the mining industry increased its profit forecast.

Index	Latest	1D Chg	YTD
Sensex (26-Apr-10)	17,745.28	0.29%	1.61%
Nifty (26-Apr-10)	5,322.45	0.35%	2.33%
Nasdaq (26-Apr-10)	2,049.09	(0.30)%	10.15%
DJIA (26-Apr-10)	11,205.03	0.01%	7.45%
S&P 500 (26-Apr-10)	1,212.05	(0.43)%	8.69%
FTSE 100 (26-Apr-10)	5,753.85	0.53%	6.30%
CAC 40 (26-Apr-10)	3,997.39	1.17%	1.55%
Nikkei 225 (26-Apr-10)	11,165.79	2.30%	5.87%
Hang Seng (26-Apr-10)	21,587.06	1.61%	(1.31)%

SENSEX

Top Gainers	Close	1DGain
Sterlite Industries	842.50	5.95%
HDFC	2,827.40	3.95%
Hindalco	184.25	3.34%

Top Losers	Close	1DLoss
Sun Pharmaceuticals	1,604.25	(4.77)%
DLF	323.00	(2.52)%
Maruti Suzuki	1,335.00	(1.97)%

NIFTY

Top Gainers	Close	1DGain
Sterlite Industries	841.25	5.80%
HDFC	2,834.00	3.91%
Axis Bank	1,277.10	3.33%

Top Losers	Close	1DLoss
Sun Pharmaceuticals	1,610.25	(4.39)%
DLF	322.35	(2.99)%
Ranbaxy	444.15	(2.40)%

Sectors	Close	1DGain/(Loss)
Metal	18,066.46	2.34%
PSU	9,084.69	0.60%
Realty	3,540.17	(1.63)%
Oil & Gas	9,998.87	(0.95)%

Market Stats	BSE	NSE
Advance-Decline ratio	1.17	1.13
Volume (in'000)	381,000	606,158

Sensex ends flat amid volatility

Disregarding positive cues from the global markets, the Sensex opened on a cautious note at 17,692.26 with a negligible negative gap of 1.94 points. Thereafter, the gauge extended its gains and traded with positive bias as the Metal stocks rose after metal prices gained on London Metal Exchange. Nonetheless, in the early afternoon session the markets trimmed some of its gains as Sun Pharmaceutical declined by about 5% on reports that the Company has been banned by the US court from selling the generic copy of the French drug maker Sanofi Aventis' cancer medicine, Eloxatin, from June 30 by the US court. Subsequently, in the late afternoon session the markets held on to its gains owing to the positive opening of the European markets. Thereafter, in the last hour of trade the markets were choppy as index heavyweight RIL fell in volatile trade as its fourth quarter results missed market expectations. The Sensex finally ended the session at 17,745.28, gaining 51.08 points or 0.29%.

The Nifty ended the day at 5,322.45, advancing 18.35 points or 0.35%.

Commodities Market

Crude oil fell for the first time in five days as the dollar strengthened against the euro, reducing the appeal of commodities to investors. Copper rose after a report showed purchases of new US homes jumped in March. Gold futures were little changed after climbing to a one-week high as some investors sought an alternative to currencies.

SENSEX

Open: 17,692.26; Close: 17,745.28;
Prv. Close: 17,694.20



Dow Jones

Open: 11,205.11; Close: 11,205.03;
Prv. Close: 11,204.28



FTSE 100

Open: 5,723.74; Close: 5,



International News

Headlines:



Most Active Stocks by Value (in Cr)

BSE	Close	%Chg	Value	Volume
ARSS Infrastructure	1,365.05	2.99%	110	808,087
Sterlite Industries	842.50	5.95%	108	1,296,459
MSK Projects	183.55	3.53%	97	5,431,553
RIL	1,069.80	(1.61)%	91	846,112
Tata Steel	656.90	1.30%	83	1,256,732
NSE	Close	%Chg	Value	Volume
ICICI Bank	960.60	(1.75)%	550	5,675,067
Axis Bank	1,277.10	3.33%	429	3,365,369
RIL	1,068.75	(1.79)%	409	3,806,402
Sterlite Industries	841.25	5.80%	375	4,512,446
Tata Steel	656.00	1.18%	279	4,236,696

Most Active Calls by Contract Value (in Cr)

	Value	Price	% Chg
Nifty 5300 Call Apr-10	7,646	42.65	3.90%
Nifty 5400 Call Apr-10	5,952	6.75	(16.67)%

Most Active Puts by Contract Value (in Cr)

Nifty 5300 Put Apr-10	6,931	25.50	(35.93)%
Nifty 5200 Put Apr-10	4,312	6.10	(55.64)%

Most Active Future Contracts by Value (in Cr)

NIFTY Apr-10	7,334	5,319.85	0.28%
NIFTY May-10	2,228	5,323.95	0.30%

Contract	Change in OI	Price	% Chg
GTLINFRA May-10	9,685,450	42.50	(0.12)%
SUZLON May-10	9,225,000	71.50	(0.07)%

FI open positions in Derivatives (NSE)

	Idx Fut	Ind Opt	Stk Fut	Stk Opt
No of Contracts	421,027	1,522,109	766,821	97,637
Amt (in cr.)	11,254	40,533	26,504	3,903

FII (Rs. Cr.)*	26-Apr-10	MTD	YTD
Equity inflows	2,122	42,435	197,246
Equity outflows	1,887	39,918	189,126
Net	234	2,517	8,121

DII (Rs. Cr.)*	26-Apr-10	MTD	YTD
Equity inflows	822	20,477	106,921
Equity outflows	896	19,095	97,109
Net	(74)	1,381	9,812

* FII & DII data is provisional in nature

Commodities	Latest	1DChg
Crude (USD/bbl) (Apr 26, 2010)	84.20	(1.08)%
Gold (USD/oz) (Apr 26, 2010)	1154.00	0.03%
Cu (USD/lb) (Apr 26, 2010)	3.55	0.50%

X-rate	26-Apr-10	1DChg	1MChg
USD/Rs.	44.3	(0.47)%	(2.23)%
GBP/Rs.	68.4	0.20%	1.44%
EUR/Rs.	59.2	0.48%	(2.20)%
JPY/Rs.	47.0	(1.36)%	(4.06)%

ADR/GDR (USD)	26-Apr-10	1DChg
Dr Reddy's	27.96	2.72%
HDFC Bank	153.47	1.70%
ICICI Bank	42.90	(4.48)%
Infosys	62.46	0.82%
Wipro	23.46	0.64%
Tata Communications	12.22	(1.61)%
Tata Motors	20.60	1.23%
MTNL	3.26	(1.81)%
Patni	25.54	(0.85)%
Sterlite	18.60	4.03%

Macro Economic Indicators

GDP Growth*	6.70%
Inflation (for the month of March, 2010)	9.90%
Index of Industrial Production (IIP) growth (February)	15.10%
CRR (Apr 26, 2010)	6.00%
SLR (Apr 26, 2010)	25.00%

* As per CSO Estimate for 2008-09

Greece moved toward getting an emergency aid package before debt payments come due in mid-May as Finance Minister George Papaconstantinou warned investors they will "lose their shirts" if they bet the cash-strapped nation will default. (Bloomberg)

Hungary's central bank cut the benchmark interest rate for the 10th consecutive month today and said it doesn't rule out market intervention if the forint continues to strengthen. The Magyar Nemzeti Bank reduced the two-week deposit rate to 5.25% from 5.5%. (Bloomberg)

UK house prices rose in April at the slowest pace in three months as the supply of homes for sale picked up, Hometrack Ltd. said. The average cost of a home in England and Wales increased 0.2% from March to GBP 158,400, the London-based property researcher said in a statement. Prices rose 1.8% from a year earlier. (Bloomberg)

German Chancellor Angela Merkel said she won't release Greek rescue funds until the country shows it's got a "sustainable, credible" plan to cut its budget deficit. "I've said for weeks that Greece must do its homework first," Merkel said. "We're not doing this because we believe Greece needs help. We're doing it because we're interested in the euro's stability." (Bloomberg)

Corporate Announcements – India:

Sterlite Industries reported a jump of over two-folds in its consolidated net profit of Rs. 13.81 bn for the fourth quarter ended March 31, 2010. (BS)

Maruti Suzuki reported a nearly three-fold jump in net profit at Rs. 6.56 bn for the quarter ending March 31, 2010. (BS)

ONGC said it has added 83 million tonnes of oil and gas reserves in the 2009-10 fiscal, the highest in two decades; even as production was lower than the target. (BS)

Economic and Political Headlines:

The government said as many as 495 central-sector projects costing Rs. 200 mn and above are running behind schedule which has resulted in cost escalation by Rs. 551.75 bn. (BS)

BSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
Ace India	INVESTWELL SECURITIES P LTD	BUY	50,000	35.00
Ace India	VED PRAKASH NARULA	SELL	109,969	35.00
Amulya Leas	SAMEER GUPTA	BUY	201,300	11.62
Amulya Leas	VARUN GARG	SELL	73,200	11.62
Ansal Housing	BP FINTRADE PRIVATE LIMITED	BUY	128,934	76.83
Ansal Housing	BP FINTRADE PRIVATE LIMITED	SELL	119,429	76.71
Asahi Infra	BASMATI SECURITIES PRIVATE LIMITED	SELL	2,400,169	1.99
Bio Green Inds	ATHENA INVESTMENT	BUY	75,000	25.52
Biopac India	DHARMENDRA JAIN	SELL	162,312	25.23
Brushman India	SICPA INDIA LTD	SELL	64,877	8.57
Century Extr	BHARAT SHANKAR PHAPALE	SELL	543,732	12.71
Chemcel Bio	BP FINTRADE PRIVATE LIMITED	BUY	239,972	12.03
Chemcel Bio	BP FINTRADE PRIVATE LIMITED	SELL	213,970	12.04
Chemcel Bio	MAYANK N GANDHI	BUY	165,115	11.46
Chemcel Bio	MAYANK N GANDHI	SELL	144,963	11.98
Chemcel Bio	RAMESHBHAI V PARMAR	BUY	279,405	11.82
Chemcel Bio	RAMESHBHAI V PARMAR	SELL	276,947	12.04
Chemcel Bio	REKHA BHANDARI	SELL	294,008	11.41
Deep Inds	ARCADIA SHARE & STOCK BROKERS PVT. LTD	BUY	106,252	116.90
Digjam	PAYAL COMMERCIAL COMPANY LIMITED	SELL	1,300,000	10.00
Digjam	SUKRITI EDUCATION SOCIETY	BUY	1,300,000	10.00
DMC Intl	BHARAT GUPTA	BUY	127,450	18.89
DMC Intl	MAHENDER SINGH	BUY	143,182	18.77
DMC Intl	MAHENDER SINGH	SELL	129,915	18.92
DMC Intl	NAVDEEP GUPTA	SELL	124,567	18.75
DMC Intl	OURS TRADING AND HOLDINGS PRIVATE LIMITED	BUY	165,723	18.89
DMC Intl	OURS TRADING AND HOLDINGS PRIVATE LIMITED	SELL	172,929	18.94
FARMAX IND	ANNAPURNA GANGA SANI	SELL	124,509	114.43
Gangotri Iron	RAGHU MAHESH	BUY	50,000	54.60
Glory Polyfilms	BHAVISH DHIRAJLAL KHAKHKHAR	BUY	132,843	23.92
Gremach Infra	SHRI HANUMAN INVESTMENTS PRIVATE LIMITED	SELL	200,000	26.48
Gremach Infra	UNNO TRADING TRADING PRIVATE LIMITED	SELL	140,000	26.40
GS Auto	NILESH EKNATH BHOIR	BUY	57,388	37.86
GS Auto	SHARDA ISPAT ROLLERS PRIVATE LIMITED	SELL	53,728	37.79
IOL Chemicals	GPB INDUSTRIES PRIVATE LIMITED	BUY	129,814	73.72
JMD Telefilms	NORTH EASTERN PUBLISHING AND ADVERTISING COMPANY LIMITED	BUY	352,200	49.59
KAY Power	BAMPSL SECURITIES LTD	BUY	72,367	16.69
KAY Power	BAMPSL SECURITIES LTD	SELL	128,859	16.02
KEW Inds	ASHOK CHINUBHAI SHAH	BUY	300,000	16.57
KEW Inds	ASHOK CHINUBHAI SHAH	SELL	141,032	16.48
KEW Inds	BP FINTRADE PRIVATE LIMITED	BUY	241,307	16.51
KEW Inds	BP FINTRADE PRIVATE LIMITED	SELL	221,307	16.57
KIC Metaliks	ADHUNIK DEALCOM PRIVATE LIMITED	BUY	64,777	104.62
KIC Metaliks	CARWIN MERCANTILES PRIVATE LTD	SELL	50,000	104.75
Mahalaxmi Rub	SAGAR CONSTRUCTION	BUY	71,150	156.50
MSK Projects	ANCHOR MALLS PVT LTD	BUY	505,115	180.29
MSK Projects	CLASSIC.INNS.PRIVATE.LTD	SELL	900,000	180.25
MSK Projects	PRTL ENTERPRISES LTD	BUY	882,398	179.96

MSK Projects	PRTL ENTERPRISES LTD	SELL	477,267	159.88
MSK Projects	SUBHKAM VENTURES (I) PRIVATE LIMITED	SELL	1,000,000	179.00
MSK Projects	SUDHADEVI PREMKUMAR AGARWAL	BUY	500,000	179.00
MSK Projects	SURBHI INVESTMENTS & TRADING COMPANY PRIVATE	BUY	159,043	179.28
MSK Projects	SURENDRAKUMAR BALKISHANDAS AGARWAL	BUY	500,000	179.00
National Plast Inds	MILIND NARAYANRAO GHOGARE	BUY	56,650	24.39
Natura Hue Chem	AHMED SAYED	BUY	95,480	15.33
Nihar Info	ALLURI PRASADRAJU	SELL	54,049	4.06
Om Metals	FINDEAL INVESTMENTS PVT LTD	BUY	530,000	36.64
Omkar Overseas	PRANALI COMMODITIES PVT.LTD	BUY	121,170	75.01
Omkar Overseas	PRANALI COMMODITIES PVT.LTD	SELL	71,170	74.93
Oriental Trimex	HANDFUL INVESTRADE PVT LTD	BUY	86,601	14.18
Oriental Trimex	YOGESH BASUDEODHAR NIDHARKA	SELL	90,000	14.08
Passari Cellu	MEENA RATHI	BUY	50,000	49.89
Richa Inds	AUREOLE SOFTWARES PRIVATE LIMITED	SELL	134,125	30.03
RISHABHDEV	BHAVISH DHIRAJLAL KHAKHKHAR	BUY	214,952	10.11
RISHABHDEV	BHAVISH DHIRAJLAL KHAKHKHAR	SELL	263,116	10.08
Saboo Sodium	SPECTRUM FOODS LIMITED	SELL	70,000	12.61
SARK SYS	KAMALESHWAR SINGH	SELL	50,000	33.70
Seshachal Tech	ANJU DHARMENDRA MADHANI	BUY	72,000	10.50
Seshachal Tech	SATYA ANNAPURNA BULUSU	SELL	200,000	10.50
Shri Ganesh Spi	CHANDRAKANT B SHAH	SELL	254,825	10.92
Sujana Uni	YALAMANCHILI VISWESWARA PRASAD	BUY	648,625	13.84
Supertex Inds	PARAMESHWAR EXPORTS PRIVATE LIMITED	SELL	772,653	4.38

Note: Bulk Deals over and above 50,000 shares are only considered

NSE Bulk Deals

COMPANY	CLIENT	TRAN	QTY	TRADED PRICE
ANSALHSG	BP FINTRADE PRIVATE LIMITED	BUY	174,635	77.11
ANSALHSG	BP FINTRADE PRIVATE LIMITED	SELL	167,341	76.76
ANSALHSG	NAMAN SECURITIES & FINANCE PVT. LTD	BUY	132,069	76.51
ANSALHSG	NAMAN SECURITIES & FINANCE PVT. LTD	SELL	94,529	75.60
ANSALHSG	SAR AUTO PRODUCTS LIMITED	SELL	98,000	73.85
ANSALHSG	TRANSGLOBAL SECURITIES LTD.	BUY	115,872	74.32
ANSALHSG	TRANSGLOBAL SECURITIES LTD.	SELL	115,872	74.33
ANSALHSG	VAGHJIBHAI GAGALDAS SHAH	BUY	110,000	76.29
EDSERV	BP FINTRADE PRIVATE LIMITED	BUY	73,552	226.32
EDSERV	BP FINTRADE PRIVATE LIMITED	SELL	65,575	225.69
EXCELINFO	SAR AUTO PRODUCTS LIMITED	BUY	161,000	52.35
GLORY	KHAKHKHAR BHAVISH DHIRAJLAL	BUY	161,040	23.77
GLORY	KHAKHKHAR BHAVISH DHIRAJLAL	SELL	142,560	23.54
ISFT	PAN EMAMI COSMED LIMITED	BUY	100,000	132.50
ISFT	SHAIL INVESTMENTS PVT. LTD.	SELL	100,000	132.50
POLARIND	MRUTYUNJAY SUDHAKER PARSEKAR	BUY	70,000	7.10
SASKEN	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	SELL	200,000	216.55
SASKEN	GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD	BUY	212,880	217.10
SUJANAUNI	YALAMANCHILI VISWESWARA PRASAD	BUY	630,000	13.87

Note: Bulk Deals over and above 50,000 shares are only considered

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