

DAILY MARKET REVIEW

MARKET SUMMARY

On the last day of the derivative expiry of July series, markets managed to close in green on the back of recovery seen in later half of the trading session. Sensex closed at 14355, up 68 points while Nifty gained 19 points to close at 4285. However, BSE Midcap and Smallcap indices ended in red, though marginally. For the whole July series, sensex is down 0.4% while Nifty is up 0.4%. However, considering the fact that Sensex was down 13% at one point of time during the series, the recovery has been admirable. Inflation for the week July 19 came at 11.98% versus 11.89% last week. This is a tad lower than the market expectation of around 12.01%.

BSE Metal and Oil & Gas indices were top gainers among sectoral indices, up 1.7% and 1.3% respectively while Healthcare and Teck indices lost 1% each in today's trade. Top sensex gainers were Tata power and Tata steel, up 5.2% and 5% respectively while Tata motors and Grasim lost 6.5% and 5.2% respectively. BSE advance-decline ratio stood at 1:1.02.

MARKET INDICATORS

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
NIFTY	4314.35	4342.00	4285.55	4332.95	19.40	0.45
SENSEX	14359.48	14369.59	14161.76	14355.75	68.54	0.48
MIDCAP	5594.58	5619.57	5551.09	5567.37	-13.64	-0.24
SMLCAP	6938.02	6962.93	6901.18	6912.79	-14.81	-0.21
BSE-100	7504.88	7504.88	7402.73	7488.48	23.69	0.32
BSE-200	1754.00	1754.00	1732.12	1749.11	4.10	0.23
BSE-500	5539.77	5540.29	5476.48	5525.77	11.45	0.21

SECTORAL INDICES

Indices	Open	High	Low	Close	Change (Pts)	Change (%)
METAL	12835.61	13011.60	12729.60	12912.61	213.91	1.68
OIL&GAS	9641.29	9756.35	9606.79	9729.48	121.74	1.27
POWER	2565.72	2597.74	2546.04	2574.27	20.05	0.78
REALTY	5067.29	5113.86	4997.99	5079.01	37.13	0.74
CD	3663.47	3704.52	3649.01	3685.84	26.64	0.73
CG	11702.23	11758.25	11528.10	11683.80	55.43	0.48
PSU	6732.88	6758.32	6665.04	6706.14	29.23	0.44
FMCG	2126.59	2157.20	2078.39	2139.18	5.96	0.28
AUTO	3660.70	3697.61	3612.76	3679.51	6.65	0.18
BANKEX	6572.56	6586.84	6374.71	6516.41	-6.21	-0.10
IT	3755.01	3755.01	3676.27	3689.57	-32.52	-0.87
TECK	3049.56	3049.56	2989.96	3000.41	-30.11	-0.99
HC	4207.66	4239.10	4133.76	4162.03	-45.88	-1.09

SENSEX MOVERS

TOP GAINER

Company	Price	Gain %
TATA POWER	1160.10	4.00
TATA STL	654.95	3.95
DLF	509.30	3.79
SBI	1414.75	2.03
RELIANCE	2206.20	1.99

TOP LOSERS

Company	Price	Loss %
TATA MOTORS	403.25	-3.13
GRASIM IND.	1800.45	-2.78
MARUTI	574.90	-2.36
WIPRO	416.00	-1.53
BHARTI	799.15	-1.33

GROUP A MOVERS

TOP GAINER

Company	Price	Gain %
EIL	602.10	5.23
BHARAT FORGE	255.45	4.97
UNITED PHOSP	339.95	4.49
MAX INDIA	192.35	4.25
SIEMENS	546.75	4.19

TOP LOSERS

Company	Price	Loss %
HIND.CONSTRUCT.	87.15	-6.49
ANSAL PROP.	90.25	-5.25
ZEE ENTERT.	194.00	-5.13
IVRCL INF.	301.60	-4.50
INDIABULLS REAL.	286.55	-4.37

TOP TRADED SENSEX STOCKS

Company	Turnover (Rs Cr)
RELIANCE	182.77
TATA STL	163.03
REL INF	135.20
RCOM	129.33
L & T	111.97

TURNOVERS (Rs CR)

Segment	Today	Yesterday
BSE Cash	5091.04	5353.98
NSE Cash	15386.69	12734.06
NSE F&O	64640.25	58543.91
Total	85117.98	76631.95

MARKET BREADTH (BSE)

Advances	Declines	Unchanged	Total
1296	1326	75	2697

CIRCUIT SUMMARY (BSE)

Group	A	B	S	T	TS	Z	Total
Upper circuit	0	116	13	28	5	32	194
Lower Circuit	0	56	7	17	3	21	104
Total	0	172	20	45	8	53	298

BULK DEALS ON BSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
31-Jul	BROADCAST INIT	Esdotcom Support & Software Ser.	BUY	130010	34.00	0.67
31-Jul	BROADCAST INIT	MERRILL LYNCH CAPITAL MARKET	SELL	290000	34.00	1.50
31-Jul	GWALIOR CHEMICAL	MORGAN STANLEY MAURI	BUY	142056	110.04	0.58
31-Jul	LIC HOUSING FIN	MORGAN STANLEY & CO INT LTD	BUY	758200	323.60	0.89
31-Jul	SHREE RENUKA SUG	MORGAN STANLEY & CO INT LTD	BUY	1400000	125.61	0.52
31-Jul	STERLING BIOTECH	DWS INVEST DWS INVEST BRIC	SELL	2150000	240.44	0.92

BULK DEALS ON NSE

Date	Scrip Name	Name of Client	Buy/Sell	Quantity	Price	% Equity
31-Jul	BROADCAST INIT	MERRILL LYNCH CAPITAL MARKET	SELL	310000	34.00	1.61

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