

Morning Market

Oct 14, 2009



News Analytics		
News	Sector	Stock
Steel Co's seek duty wall to stop Chinese import surge	Steel	
Nagarjuna Construction wins Oman road project worth Rs. 1,800 crs		Nagarjuna Construction
BSNL, MTNL may not join Vavasi to buy a 46% stake in Kuwait's Zain telecom for \$ 13.7 billion		MTNL
Results today: HDFC Bank, Concor		HDFC Bank, Concor
NELP VIII Update -Cairn India wins 2 offshore blocks; -OIL wins 5 offshore blocks -ONGC wins 12 deepwater blocks; 11 as operator-regulator		Cairn India & ONGC
Ranbaxy- Impax settles patent litigation with Boehringer Ingelheim for drug Flomax -Impax settlement may mean Ranbaxy may not have sole exclusivity for Flomax		Ranbaxy
Unitech property sales at Rs 4000 crore in last 6 months		Unitech
Suzlon blade retrofits cost 4 times estimates, spends \$100 million for the same		Suzlon
L&T lock in period for Satyam shares expires today		L&T
Axis Bank board approves setting up wholly owned NBFC		Axis Bank
TTML says subscribers cross 10 million mark in Mumbai & Maharashtra		TTML
Ispat still in NSE F&O curb, Aban comes into curb		Ispat & Aban

US

OTHER REGIONS

Japan's Producer Prices Slid 7.9% in September on Weak Corporate Demand

Australian Consumer Confidence Jumps to Two-Year High After Rate Increase. The sentiment index gained 1.7 percent to 121.4 points in October

DATA RELEASES				
TIME	COUNTRY	DATA	SURVEY	PRIOR
18.00	US	Import Price Index (Y-o-Y)	-11.4%	-15.0%
18.00	US	Advance Retail Sales	-2.1%	2.7%

CORPORATE EVENTS		
Date	Company	Event

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TRACKING MARKETS

Index	Last price	1 D Chng	5 D Chng
Sensex	17026.67	2.31	0.40
Nifty	5054.25	2.21	0.53
Dow Jones	9871.06	-0.15	1.44
FTSE (UK)	5154.15	-1.08	0.31
Nasdaq	2139.89	0.04	1.73
Nikkei	10070.35	-0.06	3.91
Hang Seng	21764.80	1.40	2.47

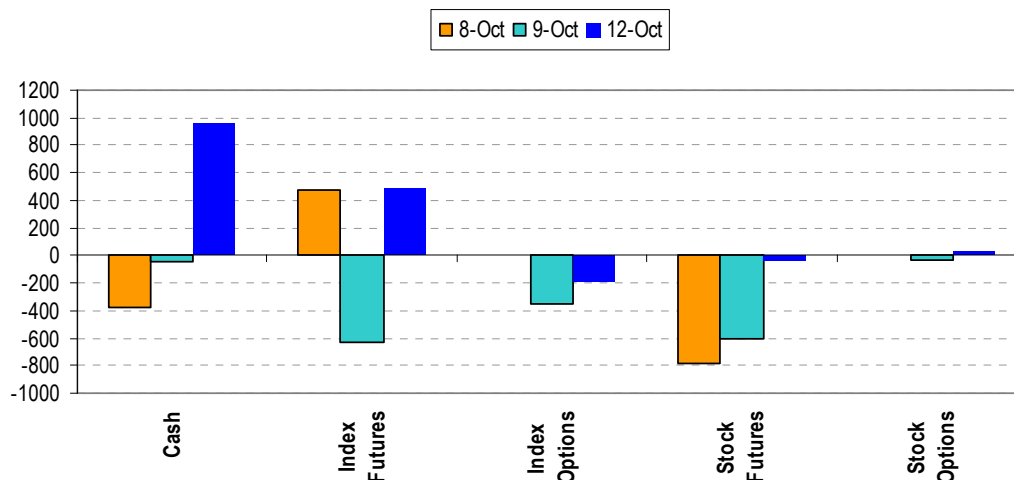
Index	Last price	1 D Chng	5 D Chng
Shipping	2023.26	-0.53	5.53
Baltic Dry Index	2646.00	-1.85	8.40
Coal	4348.34	0.38	3.02
Steel	3598.87	1.13	5.07
Water	1976.12	0.22	2.01
Nuclear	2561.16	0.65	1.66
Timber & Forestry	986.86	0.42	3.30

COMMODITIES AND CURRENCIES

	Last price	1 D Chng	5 D Chng
Gold (MCX)	16036.00	0.71	1.70
Silver (MCX)	27498.00	0.20	2.39
Crude (Nymex)	74.97	1.11	7.76
Copper (MCX)	286.40	-2.30	-0.21
Zinc (MCX)	93.05	-2.97	4.67

Currency	Last price	1 D Chng	5 D Chng
INR	46.19	0.68	1.07
Euro	1.49	0.21	1.32
Yen	89.13	0.65	-0.59

FII ACTIVITIES



FII Figures (Cr)	
12-Oct	
Cash	963.13
Index Futures	492.76
Index Options	-183.41
Stock Futures	-35.93
Stock Options	27.41

Cumulative FII positions as percentage of total gross market position in the derivative segment as on October 12, 2009 is 33.69%

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1 DAY CHANGE

Sector	India (t-1)	Asia (t)	US(t)	EU(t)	Brazil(t)
Automobiles	1.37	1.29	-0.49	-0.88	-
Banks	2.96	-0.51	-0.54	-1.50	1.29
Chemicals	2.83	0.06	0.26	-1.03	3.08
Construction and Materials	0.85	1.04	0.82	-0.69	-
Electricity	0.61	0.43	-0.63	-0.87	0.44
Fixed Line Communication	0.11	0.77	0.81	-0.44	0.32
Financials	1.70	0.36	-1.20	-0.89	1.20
Retailers	1.18	4.06	1.08	-0.33	2.36
Engineering	1.46	0.03	-0.52	-0.74	-
Metals	1.61	1.05	0.43	-0.12	0.07
Media	2.37	0.81	0.00	-0.42	0.68
Mining	3.21	2.75	1.46	-1.25	-
Mobile Telecommunicatios	1.37	0.74	-4.75	-0.41	0.68
Oil and Gas Producers	1.15	2.30	0.14	-0.58	0.53
Pharmaceutical	1.82	0.54	-1.16	-0.92	-
Real Estate	1.87	1.25	-1.61	-0.20	6.16
Software	2.73	2.61	0.46	-0.87	-

STRONG

WEAK

5 DAY CHANGE

Sector	India (t-1)	Asia (t)	US(t)	EU(t)	Brazil(t)
Automobiles	-1.62	6.92	6.16	3.91	-
Banks	3.23	3.42	3.25	-0.07	0.06
Chemicals	1.56	4.99	2.98	1.55	11.97
Construction and Materials	0.56	4.99	2.69	2.46	-
Electricity	3.23	1.32	0.39	-0.97	0.99
Fixed Line Communication	0.00	-1.09	-3.79	-0.41	2.17
Financials	2.10	4.63	1.33	1.43	1.74
Retailers	4.31	4.31	2.72	1.27	4.47
Engineering	1.93	5.09	2.46	1.33	-
Metals	6.21	8.63	4.06	4.47	4.79
Media	4.04	3.56	-3.31	1.14	3.09
Mining	8.71	8.39	4.73	2.75	-
Mobile Telecommunicatios	-12.85	0.41	-10.03	-1.66	5.85
Oil and Gas Producers	3.45	5.60	3.78	1.34	4.32
Pharmaceutical	2.29	3.63	0.39	0.83	-
Real Estate	2.04	5.46	1.39	1.89	12.08
Software	-4.48	10.82	3.52	2.86	-

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TECHNICALS

Sector	Prev Expiry	Stock	Close	S	R	30DMA	100DMA	200DMA	Trend
Nifty Spot	4,987	-	4,945.20	5030	5110-5115	4857	4542	3787	Positive
Nifty Fut	4,987	-	4,931.00			4869	4551	3796	Positive
Bank	2,167	SBI	2,067.55	2130	2225	1969	1802	1482	Positive
Bank	860	ICICI	901.80	895	950	827	756	584	Positive
Bank	1,624	HDFC	1,675.65	1670	1750	1533	1470	1225	Positive
Bank	399	Bank of India	393.80	395	420-422	367	341	292	Positive
Bank	920	Axis Bank	996.45	980-982	1030	927	845	651	Positive
Financials	915	Rel Cap	908.30	925	980	898	889	669	Positive
Financials	56	IFCI	52.95	52	55-55.20	56	52	36	ST Negative
Real Estate	424	DLF	416.05	410	440-442	418	376	291	ST Negative
Real Estate	325	HDIL	359.25	350-351	366-367	319	277	194	Positive
Oil and Gas	2,101	Reliance	2,099.75	2120	2250	2092	2058	1748	Positive
Oil and Gas	1,150	ONGC	1,220.35	1220	1300-1305	1171	1120	930	Positive
Oil and Gas	155	Essar Oil	150.60	147	153	153	152	123	ST Negative
Oil and Gas	259	Cairn	261.50	259	270	261	243	209	Positive
Oil and Gas	87	RNRL	83.05	84.5	90	87	84	68	ST Negative
Metals	513	Tata Steel	532.55	520-522	575	479	438	325	Positive
Metals	173	SAIL	174.00	170-171	180-181	168	165	128	Positive
Metals	759	Sterlite	791.90	790	835	733	654	486	Positive
Metals	129	Hindalco	128.10	126	131-132	120	99	75	Positive
Infra	2,246	BHEL	2,429.30	2370	2500	2291	2207	1834	Positive
Infra	237	JP Associates	238.10	235-236	248-249	233	218	153	Positive
Infra	1,658	LT	1,633.30	1630	1700	1620	1511	1128	Positive
Sugar	194	Renuka	195.35	188-189	200-201	194	162	123	Positive
Sugar	178	Bajaj Hind	185.05	180	190	180	180	121	Positive
Sugar	103	Praj	95.80	93.5	99.5-100	101	96	78	ST Negative
FMCG	233	ITC	249.65	252-253	265	233	217	198	Positive
FMCG	260	HUL	286.90	285-286	300	265	262	254	Positive
Fertilizers	53	Chambal	52.25	51.5	54.5	54	58	49	ST Negative
Fertilizers	33	Nagarjuna	33.95	33.5	36	34	36	27	ST Negative
Power	1,215	Rel Infra	1,293.60	1330	1400	1193	1179	882	Positive
Power	212	NTPC	209.95	204-205	215-216	209	208	195	Positive
Power	166	Rpower	160.30	160-161	168-169	164	168	-	ST Negative
Power	92	Suzlon	85.50	83-83.5	90	95	99	76	ST Negative
Power	1,312	Tata Power	1,302.45	1290	1350	1302	1207	992	Positive
Tele Com	305	Rcom	248.85	240	255-256	290	288	240	ST Negative
Tele Com	419	Bharti	343.30	344-345	360-361	412	408	370	Negative
Pharma	394	Ranbaxy	386.85	380	410	358	296	245	Positive
IT	2,284	Infosys	2,177.60	2185	2290	2251	1953	1627	ST Negative
IT	603	TCS	561.75	568-570	590	570	468	366	ST Negative

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CORPORATE ACTIONS

Dividend

Name	Dividend	Per Share	Ex Date	Record/B.C. Date	Remarks
INFOSYS	Interim	10.00	15-Oct	16-Oct	
RELIANCE	Final	13.00	16-Oct	21-Oct	
PANTALOONR	Interim	0.60	25-Nov	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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