

DAILY | FUNDAMENTAL



OUR REPORTS

Fundamental

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Daily & Weekly

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- Debt Mutual Fund Report

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- India Economy Report
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- Company Result Analysis

Others

- Event Based Report
- RBI Monetary Review Report
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- Annual Budget Review Report

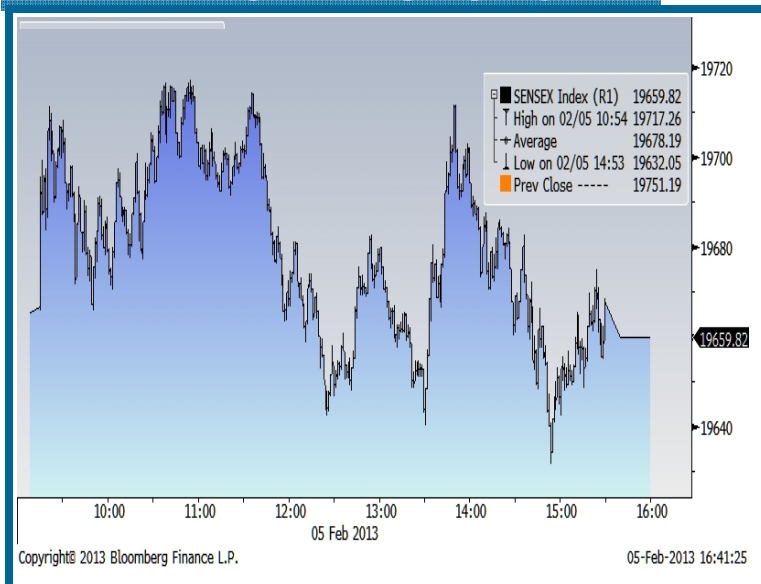
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MARKET UPDATE

INTRA DAY CHART OF SENSEX



Disappointing corporate results, poor global cues and weak domestic economic situation kept investors in the sidelines once again, leading to a very sluggish Tuesday .

Nifty closed at 5956.90 down by 30.35points or 0.51percent over the previous day closing of 5987.25 after witnessing a low of 5946.90 and a high of 5970.35. Sensex closed at 19659.82 down by 91.37points or 0.46percent over the previous day closing of 19751.19. It touched an intraday low of 19631.97 and high of 19717.26.

The markets' breadth was negative. Out of 2953 stocks traded, 819 stocks advanced, 1417 stocks declined and 717 stocks remained unchanged. In Sensex, Out of 30 stocks 11 stocks advanced and 19 stocks declined.

Among the sectors, BSE Consumer Durables, BSE FMCG and BSE Power were the main losers of the day, which decreased by 1.57percent, 1.03percent and 0.75percent respectively.

In BSE Consumer Durables sector Bajaj Electr, Titan Inds, and VIP Inds decreased by 3.09percent,2.63percent and 1.94percent respectively. In BSE FMCG sector Jubilant Food, Tata Global and ITC declined by 8.24pcent,2.48percent and 1.58percent respectively. In BSE Power sector BHEL, Lanco Infra and Tata Power decreased by 3.19percent, 2.04percent and 1.50percent respectively.

MARKET TURNOVER (Rs.Cr)

NAME	LAST	PREVIOUS DAY
NSE CASH	10902.86	11399.13
NSE F&O	92417.38	87290.47

NIFTY TOP TURNOVERS

COMPANY	LAST PRICE	SHARE TRADED	TOTAL TURNOVER (Rs. Cr)
MCDOWELL-N	1892.00	3292862	621.69
SBIN	2375.00	2237535	527.26
JUBLFOOD	1041.00	2713964	286.77
DLF	273.40	9891040	268.20
ICICIBANK	1165.70	2255881	263.94

NIFTY TOP GAINERS

COMPANY	LAST PRICE	CHANGE	% CHANGE
SUNPHARMA	746.30	26.60	3.70
AMBUJACEM	203.00	6.00	3.05
ACC	1325.00	24.45	1.88
ULTRACEMCO	1927.00	29.66	1.56
GAIL	344.95	5.15	1.52

NIFTY TOP LOSERS

COMPANY	LAST PRICE	CHANGE	% CHANGE
JPASSOCIAT	76.20	3.40	(4.27)
BHEL	211.40	7.65	(3.49)
BANKBARODA	785.00	19.15	(2.38)
TATAPOWER	98.35	1.95	(1.94)
BHARTIARTL	325.00	6.05	(1.83)

OUTLOOK

Indian Markets is likely to remain rangebound as there is no immediate trigger for the markets to react on. However improvement in U.S. markets may have some positive impact on the Indian markets. So far the results season have been a mixed bag. Eventually the markets will look up to the budgetary session which commences from February 21,2013. Prices of Non -ferrous metals remain firm during the week ,hence we expect some kind of buying in the metal space. Hike in diesel prices may keep the oil & gas sector in the limelight. Corporate earnings scheduled next week may induce stock specific volatility. Important results during the week are ACC, Ambuja, Apollo Tyres, and others. BUY ICICI Bank,Hindalco, Sterlite and in the midcap space NBCC, ILFS, Bata India Indian Bank, Pidilite Industries for both investment purpose.

DOMESTIC INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
SENSEX	19659.82	-91.37	(0.46)
NIFTY	5956.90	-30.35	(0.50)
BSE MID-CAP	6863.70	-45.88	(0.66)
BSE SMALL-CAP	6935.67	-71.06	(1.01)
NSE CNX MIDCAP INDEX	8229.90	-57.45	(0.69)

SECTORAL INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
AUTO	10905.67	-31.32	(0.28)
CAPITAL GOODS	10329.22	-48.65	(0.46)
FMCG	5856.54	-60.76	(1.02)
METAL	10330.07	-76.82	(0.73)
OIL & GAS	9209.68	-60.02	(0.64)
HEALTHCARE	8034.37	68.40	0.85
POWER	1911.56	-14.39	(0.74)
REALTY	2193.96	-7.88	(0.35)
CONSUMER DURABLES	7557.14	-120.21	(1.56)
BANK	14302.10	-87.24	(0.60)
IT	6342.09	-9.93	(0.15)

GLOBAL INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
DOW JONES	13880.08	-129.71	(0.92)
NASDAQ	3131.16	-47.93	(1.50)
S&P 500	1495.71	-17.46	(1.15)
FTSE	6275.94	29.58	0.46
CAC	3687.29	27.35	0.74
DAX	7642.58	4.57	0.05
MEXICO BOLSA	45768.49	490.43	1.08
BRAZIL BOVESPA	59575.66	-775.50	(1.28)
RUSSIAN RTS	1613.89	1.37	0.08
NIKKEI 225	11046.92	-213.43	(1.89)
HANG SENG	23148.53	-536.48	(2.26)
TAIWAN TAIEX	7886.94	-36.22	(0.45)
SHANGHAI	2433.13	4.97	0.20
KOSPI	1938.18	-15.03	(0.77)
FTSE BURSA MALAYSIA KLCI	1633.35	-1.20	(0.07)
JAKARTA COMPOSITE	4479.44	-11.12	(0.24)
PSEI - PHILIPPINE SE	6470.49	34.51	0.53
STOCK EXCH OF THAI	1505.72	-0.65	(0.04)

INDUSTRIAL METALS & ENERGY MARKETS

NAME	LAST PRICE	CHANGE	% CHANGE
COPPER (USD/T)	8287.75	-17.25	(0.20)
ALUMINUM (USD/T)	2116.00	3.25	0.19
ZINC (USD/T)	2174.50	-10.50	(0.48)
LEAD (USD/T)	2444.75	-6.25	(0.25)
OIL (USD/BBL)	96.64	0.49	0.48
NATURAL GAS (USD/MMBTU)	3.33	0.02	0.69

PRECIOUS METALS

NAME	LAST PRICE	CHANGE	% CHANGE
GOLD (USD/OZ)	1677.58	3.88	0.23
SILVER (USD/OZ)	31.85	0.10	0.33

INDUSTRY INDICES

NAME	LAST PRICE	CHANGE	% CHANGE
BALTIC DRY INDEX	745.00	-5.00	(0.67)
BBG WORLD IRON/STEEL IDX	193.30	-0.86	(0.44)

CURRENCIES

NAME	LAST PRICE	CHANGE	% CHANGE
USD-INR	53.13	-0.15	(0.29)
EUR-INR	71.95	-0.36	(0.47)
GBP-INR	83.72	-0.10	(0.12)
INR-JPY	1.75	0.01	1.04

INSTITUTIONAL FLOW IN Cr (04/02/2013)

INSTRUMENT	PURCHASE	SALE	NET
FII	5102.00	2536.80	2565.20
DII	746.78	1339.11	(592.33)

FII DERIVATIVE SEGMENT IN Cr (04/02/2013)

INSTRUMENT	PURCHASE	SALE	NET
INDEX FUTURE	1162.04	1872.38	(710.33)
INDEX OPTION	10024.50	9534.99	489.51
STOCK FUTURE	1897.00	1520.40	376.61
STOCK OPTION	1145.31	1138.12	7.18

BULK & BLOCK DEALS

http://www.bseindia.com/mktlive/market_summ/bulk_deals.asp

http://www.bseindia.com/mktlive/market_summ/block_deals.asp

- ◆ The new steel policy, likely to be announced in a month, is expected to iron out issues related to foreign direct investments, land acquisitions and environment clearances. The draft of the new policy, seen as a stimulus measure, has been circulated for final comments and it would be announced soon. The sector is in the midst of a slowdown due to severe raw material crunch and a halt in commissioning of new projects. The policy is expected to have solutions to problems plaguing the sector — the recent ban on iron ore mining in Karnataka, Odisha and Goa, land acquisition problems and delays in getting environment clearances. The ban on iron ore mining has forced steel companies to import raw material, increasing costs. Steel projects — including those of ArcelorMittal and Posco — could not take off because of such issues. Policy could end land acquisition and green nod problems, and encourage foreign investors.
- ◆ Coal India Limited (CIL) has denied any wrongdoing in the signing of supply pacts with power firms. The clarification followed a media report alleging CIL had signed pacts with 11 companies, despite these not qualifying for the process. CIL said its subsidiaries didn't deviate from norms in signing fuel supply agreements (FSAs) with 11 power firms. It added FSAs had officially been executed with only three of the 11 companies — Maithon Power, Rosa Power Supply Company and Adhunik Power and Natural Resource. "While eight firms have already achieved their milestones, FSAs are yet to be inked with them. However, memoranda of understanding have been signed with two of the eight firms awaiting formal signing of FSAs," CIL said. These include a unit of NTPC's Dadri power plant by NTPC and a unit of Damodar Valley Corporation's Mejia power plant.
- ◆ As many as a million bank employees and officers are to strike work on February 20 and 21. The strike call has been given by the United Forum of Bank Unions, a representative body of the nine bank unions of the country. The employees are demanding that the Government should desist from banking reforms and outsourcing of banking related work. The demands include early wage revision besides settling of pending issues like compassionate appointment scheme.
- ◆ Peerless Mutual Fund has become the first fund house to introduce the option of making cash investments in mutual fund schemes. The fund house has for this purpose tied up with Allahabad Bank for providing this facility. This option is in accordance with the SEBI guideline allowing mutual fund houses to accept cash investments of up to Rs 20,000 from investors for investing in mutual fund schemes. Peerless Mutual Fund aims to cater to un-banked customers in tier-III and tier-IV locations through this facility. Allahabad Bank has a strong presence in these markets.
- ◆ Indian Bank will cut its lending rate by 0.30 per cent to 10.20 per cent with effect from February 9, 2013. The bank has decided to reduce its base rate by 0.30 per cent from the existing 10.50 per cent. It has also decided to cut its benchmark prime lending rate by 0.25 per cent. This comes a week after the Reserve bank of India cut its repo rate (the rate at which the RBI lends short-term money to banks) and cash reserve ratio (the slice of bank deposits parked with the RBI) by 25 basis points.
- ◆ Crompton Greaves (CG) has signed long term supply relationship agreement with Transpower NZ Ltd, owners and operators of the New Zealand national grid. With this agreement, CG becomes the first of three preferred vendors to supply transformers to Transpower, with the potential to scale to orders worth US\$15 million annually. The transformers are being manufactured in CG's Jakarta, Indonesia facility, the company announced here.

CORPORATE ACTION BONUS / RIGHTS / STOCK SPLIT / ADR & GDR / FCCB / M&A / WARRANTS ETC.			
COMPANY	RECORD DATE	Ex-DATE	DETAILS
TVS MOTOR	07/02/2013	06/02/2013	INTERIM DIVIDEND INR0.60PER SHARE (PURPOSE REVISED)

OTHER EVENTS

- ♦ U.S. MBA Mortgage Application data for the week ended February 01,2013.

- Investment Banking
- Equity, Commodity & Currency Broking
- Wealth Management
- Insurance Broking
- Club Kautilya
- prpsolutions.com



accountable... answerable, always



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