

**MARKET SUMMARY**
**Intraday Nifty chart**


The indices witnessed massive selling pressure in the last one and half hour of trade following negative cues from Europe. The markets opened in the green tracking mild positive cues from Asia. Though the opening in Europe was positive but soon turned gloomy which dragged the markets down. Though it managed to recover some lost ground yet the closing remained disappointing. Only the FMCG index closed in the green. Metals again faced most of the selling pressure. The BSE Sensex closed lower by 163.97 points at 16,617.10 while NSE Nifty ended lower by 46.90 points at 4,987.10. BSE Midcap closed with a loss of 37.61 points at 6,758.09 while BSE Smallcap closed with a loss of 47.06 points at 8,468.30. The BSE Sensex touched intraday high of 16,895.73 and intraday low of 16,560.64.

Gainers from the BSE Sensex pack were – Tata Power 1.43%, Cipla 0.89%, HDFC 0.86%, ITC 0.78%, NTPC 0.50% and HUL 0.26%. Losers were Hindalco Inds 5.81%, Reliance Comm 4.69%, Bharti Airtel 3.77%, ICICI Bank 3.00%, DLF 2.57%, Reliance Infra 2.50%, Hero Honda 2.23%, Tata Steel 2.19%, Sterlite Inds 1.90% and Maruti Suzuki 1.55%.

23 stocks ended in red territory and 7 in green territory. The overall market breadth was negative as out of total 2927 stocks traded on BSE, 1673 stocks declined, 1125 stocks advanced and 129 stocks remained unchanged.

Realty index was down by 2.57%. The main losers were Indiabulls Real Est 3.97%, Orbit Corp 3.57%, HDIL 3.27%, Unitech 2.95%, DLF 2.57%, Peninsula Land 2.57%, Sobha Dev 2.55% and Akruti City 0.94%.

Metal index lost by 2.19%. The main losers were Hindalco Inds 5.81%, NMDC 2.36%, Sesa Goa 2.31%, WELCORP 2.28%, Tata Steel 2.19%, SAIL 2.12% and Hindustan Zinc 1.96%.

Oil&Gas index was down by 1.38%. The main losers were Essar Oil 4.12%, BPCL 3.29%, Reliance Nat Res 3.13%, HPCL 2.49%, Aban Offshore 2.33% and IOC 1.76%.

Teck index was 1.37%. The main losers were GTL Infra 5.01%, Reliance Comm 4.69%, Bharti Airtel 3.77%, Reliance Media 2.85%, Tata Teleservices 2.70%, Idea Cellular 2.47%, HCL Tech 2.43%, MTNL 2.27%, Zee Entert 2.11%, Deccan Chron 2.07%, Tata Comm 1.79% and Sterlite Tech 1.62%.

Telecom companies' shares saw profit booking as Bharti Airtel, which took control of Zain Assets today, lost 3.7%. Reliance Communications was down 5% and Idea Cellular was down 2%.

In the Oil & Gas space, ONGC, Reliance Industries and Cairn India lost by 1% each. Oil marketing companies' shares like BPCL, HPCL and IOC went down 3.5%, 2.5% and 1.76%, respectively.

IT stocks like Wipro and HCL Tech from technology pack slipped 1.6% & 2.3%, respectively. TCS and Infosys lost 0.4-0.6%.

In the banking and financial space, ICICI Bank lost by 2.9%. Among the other financial shares, HDFC Bank was down 0.7% while SBI down just 0.14%. Kotak Mahindra Bank declined 2%. However, HDFC and Axis Bank gained around 1% each.

On the global front the Asian indices ended on a mixed note while the European indices were down when reports last came in.

**MARKET AT A GLANCE**

	Close	% Chg	
SENSEX	16617.10	0.98	▼
S&P CNX NIFTY	4987.10	0.93	▼
MIDCAP	6758.09	0.55	▼
CD	4374.82	1.18	▼
REALTY	2903.78	2.57	▼
IT	5166.52	0.75	▼
BANKEX	10460.91	1.19	▼
OIL&GAS	9817.22	1.38	▼
METAL	13888.55	2.19	▼
FMCG	3067.04	0.69	▲
CNX NIFTY JUNIOR	10682.90	0.71	▼
CNX MIDCAP	7741.95	0.55	▼
CNX IT	5740.70	0.78	▼
CNX 100	4963.45	0.90	▼
BANK NIFTY	9185.30	1.15	▼
MARKET TURNOVER	101547	Cr	



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**Advances/ Declines (BSE)**

	A	B	S	Total
Advances	51	609	153	813
Declines	148	976	230	1354
AD Ratios	0.34	0.62	0.67	0.60

**FOREX**

Rs/\$	46.95
Rs/Euro	56.13

**DII / FII position**

FII (07/06)(PROV)	403.45 Cr(-)
DII (07/06)(PROV)	202.51 Cr(-)

**Most Active Futures Contracts on Individual Securities (08/06/2010)**

Symbol	Exp Date	No of Contracts
TATASTEEL	24-Jun-2010	24968
RCOM	24-Jun-2010	24453
ICICIBANK	24-Jun-2010	19499
SBIN	24-Jun-2010	19005
TATAMOTORS	24-Jun-2010	18999
SESAGOA	24-Jun-2010	16876
HINDALCO	24-Jun-2010	16135
RELIANCE	24-Jun-2010	15700
JSWSTEEL	24-Jun-2010	14324
DLF	24-Jun-2010	13343

**Most Active Option Contracts on Individual Securities (08/06/2010)**

Symbol	Exp Date	Strike Price	Option Type	No of Contract
ONGC	24-Jun-2010	1200	CA	3165
ONGC	24-Jun-2010	1200	PA	2777
TATASTEEL	24-Jun-2010	480	CA	2421
RCOM	24-Jun-2010	170	CA	2363
HINDALCO	24-Jun-2010	150	CA	2159
RELIANCE	24-Jun-2010	1020	CA	1987
BHARTIARTL	24-Jun-2010	280	CA	1849
RCOM	24-Jun-2010	180	CA	1657
RELIANCE	24-Jun-2010	1000	PA	1627
ITC	24-Jun-2010	280	CA	1626

**NSE TOP GAINERS:**

Scripts	Today's Close	Previous Close	Change (%)
NEOCURE	4.10	3.50	17.14
GISOLUTION	19.45	17.35	12.10
THANGAMAYL	119.40	108.55	10.00
IVP	45.05	41.00	9.88
PATSPINLTD	12.45	11.40	9.21
M&MFIN	470.00	432.75	8.61
STEELTUBES	2.15	2.00	7.50
RADAAN	2.95	2.75	7.27
SRGINFOTEC	0.75	0.70	7.14
INDIANCARD	143.50	134.00	7.09

**NSE TOP LOSERS:**

Scripts	Today's Close	Previous Close	Change (%)
KARURKCP	54.75	60.75	9.88
RALLIS	1068.00	1575.20	9.87
SABTN	31.10	34.30	9.33
REIAGROLTD	28.00	30.25	7.44
KESARENT	45.30	48.55	6.69
LCCINFOTEC	0.70	0.75	6.67
BHARATRAS	105.50	112.85	6.51
ENERGYDEV	43.00	45.75	6.01
AFL	56.55	60.15	5.99
HINDALCO	132.50	140.65	5.79

**NSE BULK DEAL (07/06/10)::**

NAME	CLIENT NAME	BUY/SELL	QUANTITI	PRICE
Karur K.C.P. Packkagings	SAR AUTO PRODUCTS LIMITED	BUY	84361	57.30
Mangalam Cement Ltd	BIRLA SUNLIFE INSURANCE CO.LTD	BUY	160000	151.00
Mangalam Cement Ltd	BIRLA MUTUAL FUND	SELL	160000	151.00

**BSE BULK DEAL (07/06/10)::**

NAME	CLIENT NAME	BUY/SELL	QUANTITY	PRICE
ACI Infocom	SAGAR TEX CREATION PRIVATE LIMITED	BUY	50000	23.25
BGIL Films	CSM COMMODITY LIMITED	BUY	160000	13.73
KAY Power	BAMPSL SECURITIES LTD	BUY	56770	15.22
Lakshmi Vilas Bank	SMART EQUITY BROKERS PRIVATE LIMITED	BUY	144422	89.40
Lakshmi Vilas Bank	TRANSGLOBAL SECURITIES LTD.	BUY	184052	88.48
Polypro Fibrils	AQUATORIS HOLDINGS LTD.	BUY	100000	28.00
Roselabs Inds	RAMESH MOHOD	BUY	59731	70.40
Rotam Comm	ANKITA K SHETH	BUY	25059	94.25
Shakti Pumps	HARDIK MAHESHBHAI PANDYA	BUY	34000	174.50
Shalibhadra Fin	SANTOSH MADANLAL SOMANI	BUY	42500	35.00
SKS Logistics	NILESH EKNATH BHOIR	BUY	134581	29.63
SKS Logistics	PRASHANT MAHADEV KAMBLE	BUY	87000	32.45
Cupid Trades	SHAMANJWALI PVT LTD	SELL	10000	54.20
Dazzel Conf	JMP SECURITIES PVT LTD	SELL	29831	22.16
Lakshmi Vilas Bank	SMART EQUITY BROKERS PRIVATE LIMITED	SELL	144422	89.46
Lakshmi Vilas Bank	TRANSGLOBAL SECURITIES LTD.	SELL	184052	88.61
Orbit Exports	IMMORTAL FINANCIAL SERV P LTD	SELL	75000	30.47
Oregon Comm	VIRENDRAKUMAR JAYANTILAL PATEL	SELL	11000	350.11
Sulzer India	GANDIV INVESTMENT PVT. LTD.	SELL	26461	1538.81
Supertex Inds	DHAVAL AMRISH SHAH	SELL	600000	2.59
Vertex Sec	VIDHYA EQUIRESEARCH PRIVATE LIMITED	SELL	240000	51.65
Vertex Sec	AASHKA CONSTRUCTION PRIVATE LIMITED	SELL	134188	51.65
Women Networks	SANJU KABRA	SELL	33423	32.82
Women Networks	KANTA CHHAJER	SELL	34422	32.62

### Today's Recommendation from our Research desk

STOCK	RECO	CMP	NET RATE	SL	EXIT PR	NET RATE	STATUS	LOT SIZE	P/L	MARGIN	RETURN
DR REDDY	SELL	1409.5	1,408.51	1420.5	1409.5	1,410.49	AT PAR	71	(140.00)	100,000.00	(0.14)
CAN BANK	BUY	431.2	431.50	426.5	429.5	429.20	AT PAR	232	(533.97)	100,000.00	(0.53)
STER	BUY	628.3	628.74	622.5	622.5	622.06	TRIGGERED	159	(1,062.48)	100,000.00	(1.06)
AMRUTANJAN	BUY	817	817.57	808.5	808.5	807.93	TRIGGERED	122	(1,179.66)	100,000.00	(1.18)
EXIDE	BUY	124.6	124.69	123.1	123.1	123.01	TRIGGERED	803	(1,343.01)	100,000.00	(1.34)
HINDALCO	SELL	139.8	139.70	141.2	136.6	136.70	HIT	715	2,150.59	100,000.00	2.15
DR REDDY	SELL	1407	1,406.02	1418.5	1390	1,390.97	HIT	71	1,069.09	100,000.00	1.07
CIPLA	SELL	325.8	325.57	328.2	323.7	323.93	HIT	307	505.02	100,000.00	0.51
DLF	SELL	256.5	256.32	259.1	256.5	256.68	AT PAR	390	(140.00)	100,000.00	(0.14)

**(674.43)**

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