

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

**MARKET AT A GLANCE**

|                  | Close    | % Chg |   |
|------------------|----------|-------|---|
| SENSEX           | 17064.95 | 0.84  | ▲ |
| S&P CNX NIFTY    | 5119.35  | 0.80  | ▲ |
| MIDCAP           | 6884.82  | 0.28  | ▲ |
| CD               | 4424.29  | 0.24  | ▼ |
| REALTY           | 2975.79  | 0.26  | ▼ |
| IT               | 5161.51  | 0.08  | ▼ |
| BANKEX           | 10747.98 | 1.04  | ▲ |
| OIL&GAS          | 10172.20 | 1.67  | ▲ |
| METAL            | 14431.43 | 0.22  | ▲ |
| FMCG             | 3022.13  | 0.31  | ▲ |
| CNX NIFTY JUNIOR | 10914.00 | 0.15  | ▼ |
| CNX MIDCAP       | 7892.30  | 0.15  | ▲ |
| CNX IT           | 5739.25  | 0.07  | ▲ |
| CNX 100          | 5091.10  | 0.65  | ▲ |
| BANK NIFTY       | 9451.75  | 1.13  | ▲ |
| MARKET TURNOVER  | 105859   | Cr    |   |



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Positive cues from world indices led the markets to close on a positive note though they gave up much of the gains garnered during the morning hours on the back of strong IIP data at 17.60% in April 10 as against 13.50% in March 10. In the sectoral front Oil&Gas, CG, Bankex and Auto lead the front while HC, Teck and Realty sectors remained on seller's radar. The BSE Sensex closed higher by 142.87 points at 17,064.95 while NSE Nifty ended higher by 40.75 points at 5,119.35. BSE Midcap closed with a gain of 19.08 points at 6,884.82 while BSE Smallcap closed with a gain of 37.90 points at 8,637.79. The BSE Sensex touched intraday high of 17,131.56 and intraday low of 16,994.07.

Gainers from the BSE Sensex pack were – RIL 3.03%, BHEL 2.66%, M&M 2.11%, ICICI Bank 1.94%, Jindal Steel 1.82%, HDFC 1.74%, HDFC Bank 1.54%, TCS 1.12% and Maruti Suzuki 0.80%. Losers were Bharti Airtel 3.75%, Sterlite Inds 1.04%, ACC 0.98%, Reliance Infra 0.90% and Reliance Comm 0.89%.

21 stocks ended in green and only 9 stock ended in red. The overall market breadth was positive as out of total 2967 stocks traded on BSE, 1531 stocks advanced, 1311 stocks declined and 125 stocks remained unchanged.

Oil&Gas index was up by 1.67%. The main gainers were RIL 3.03%, Aban Offshore 1.67%, Cairn India 1.33% and Gail India 0.34%.

Bankex index gained by 1.04%. The main gainers were Indusind Bank 5.23%, Yes Bank 2.01%, ICICI Bank 1.94%, HDFC Bank 1.54%, Kotak Mah Bank 1.31% and PNB 1.25%.

CG index gained by 1.01%. The main gainers were Jyoti Struc 3.54%, Areva T&D 3.06%, Siemens 2.69%, BHEL 2.66%, Bharat Elect 2.22%, Reliance Indl Infra 1.82%, Usha Martin 1.21%, AIA Engineering 1.19% and Crompton Greav (1.01%).

HC index was down by 0.55%. The main losers were Dr Reddys Lab 2.31%, Cadila Health 1.37%, Sun Pharma 1.29%, Glaxosmithkl Phar 1.25%, Divis Lab 1.15%, Glenmark Pharma 1.03% and Jubilant Org 0.62%.

Teck index lost by 0.48%. Bharti Airtel 3.75%, Dish TV India 2.01%, Sun TV Network 1.95%, TV Eighteen 1.90%, Idea Cellular 1.63%, Tata Comm 1.62%, HT Media 1.30%, Tata Teleservices 1.24, Oracle Fin 1.21% and GTL Infra 0.91% were the major losers.

In the banking and financial space, ICICI Bank, HDFC and Kotak Mahindra Bank gained 2% each. HDFC Bank and PNB rose 1.5% each. SBI went up 0.56% while IDFC declined 1.6%.

In the auto segment, M&M rose 2.35%. Maruti Suzuki and Tata Motors gained 0.76% each. Hero Honda rose 0.38%.

ITC from FMCG space was up 0.5% and HUL up 0.3%. In the metal segment, Jindal Steel, Hindalco and Tata Steel from metal pack gained 0.5-2% while Sterlite Industries declined 1%.

Unitech from realty space lost 3.5% and DLF was down 0.13%. ACC and Ambuja Cements went down 0.7-0.8%.

On the global front the Asian indices ended in green while the European indices were also in green when reports last came in.

**Advances/ Declines (BSE)**

|           | A    | B    | S    | Total |
|-----------|------|------|------|-------|
| Advances  | 102  | 1058 | 247  | 1407  |
| Declines  | 101  | 893  | 197  | 1191  |
| AD Ratios | 1.01 | 1.18 | 1.25 | 1.18  |

**FOREX**

|         |       |
|---------|-------|
| Rs/\$   | 46.82 |
| Rs/Euro | 56.66 |

**DII / FII position**

|                   |              |
|-------------------|--------------|
| FII (10/06)(PROV) | 244.76 Cr(+) |
| DII (10/06)(PROV) | 105.19 Cr(-) |

**Most Active Futures Contracts on Individual Securities (11/06/2010)**

| Symbol     | Exp Date    | No of Contracts |
|------------|-------------|-----------------|
| RELIANCE   | 24-Jun-2010 | 33061           |
| HDIL       | 24-Jun-2010 | 18377           |
| TATASTEEL  | 24-Jun-2010 | 17290           |
| BHARTIARTL | 24-Jun-2010 | 16533           |
| TATAMOTORS | 24-Jun-2010 | 16011           |
| ICICIBANK  | 24-Jun-2010 | 15263           |
| SBIN       | 24-Jun-2010 | 14366           |
| HINDALCO   | 24-Jun-2010 | 14355           |
| RCOM       | 24-Jun-2010 | 13397           |
| DLF        | 24-Jun-2010 | 12789           |

**Most Active Option Contracts on Individual Securities (11/06/2010)**

| Symbol     | Exp Date    | Strike Price | Option Type | No of Contract |
|------------|-------------|--------------|-------------|----------------|
| RELIANCE   | 24-Jun-2010 | 1050         | CA          | 3440           |
| RELIANCE   | 24-Jun-2010 | 1040         | CA          | 3369           |
| RELIANCE   | 24-Jun-2010 | 1100         | CA          | 2825           |
| RELIANCE   | 24-Jun-2010 | 1000         | PA          | 2266           |
| BHARTIARTL | 24-Jun-2010 | 280          | CA          | 2050           |
| HINDALCO   | 24-Jun-2010 | 140          | CA          | 2017           |
| TATASTEEL  | 24-Jun-2010 | 480          | CA          | 2015           |
| UNITECH    | 24-Jun-2010 | 75           | CA          | 1972           |
| HINDALCO   | 24-Jun-2010 | 150          | CA          | 1827           |
| RELIANCE   | 24-Jun-2010 | 1020         | CA          | 1787           |

**NSE TOP GAINERS:**

| Scripts    | Today's Close | Previous Close | Change (%) |
|------------|---------------|----------------|------------|
| ASSAMCO    | 21.40         | 17.80          | 20.22      |
| HINDUJAVEN | 325.00        | 270.80         | 20.01      |
| UTISUNDER  | 1157.99       | 964.99         | 20.00      |
| EXCELCROP  | 238.00        | 199.65         | 19.21      |
| UCALFUEL   | 82.60         | 72.05          | 14.64      |
| EICHERMOT  | 917.70        | 800.90         | 14.58      |
| HALONIX    | 85.25         | 74.45          | 14.51      |
| ANTGRAPHIC | 0.45          | 0.40           | 12.50      |
| BHARATGEAR | 50.55         | 45.35          | 11.47      |
| GISOLUTION | 23.00         | 20.80          | 10.58      |

**NSE TOP LOSERS:**

| Scripts    | Today's Close | Previous Close | Change (%) |
|------------|---------------|----------------|------------|
| SPLIL      | 8.80          | 9.65           | 8.81       |
| DELTAMAGNT | 15.70         | 17.10          | 8.19       |
| BATLIBOI   | 31.50         | 33.85          | 6.94       |
| TOKYOPLAST | 12.55         | 13.45          | 6.69       |
| BVCL       | 32.45         | 34.50          | 5.94       |
| MANDHANA   | 146.80        | 155.80         | 5.78       |
| MANALU     | 55.75         | 59.10          | 5.67       |
| MSPL       | 40.65         | 42.90          | 5.24       |
| BEARDESELL | 49.65         | 52.25          | 4.98       |
| SOLEMS     | 63.15         | 66.45          | 4.97       |

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

| NAME                      | CLIENT NAME                               | BUY/SELL | QUANTITI | PRICE   |
|---------------------------|---|----------|----------|---------|
| ARSS Infra Proj. Ltd      | MANIPUT INVESTMENTS PVT. LTD.             | BUY      | 94015    | 1203.67 |
| Austral Coke & Projects L | SAAKSHI SHARES PVT.LTD.                   | BUY      | 3019678  | 7.37    |
| Glory Polyfilms Limited   | HANSABEN HASMUKHBHAI AMIN                 | BUY      | 399024   | 16.21   |
| Insecticides (India) Limi | CROSSEAS CAPITAL SERVICES PVT. LTD.       | BUY      | 121275   | 182.16  |
| Insecticides (India) Limi | GOLDMAN SACHS INVESTMENTS MAURITIUS I LTD | BUY      | 70287    | 177.70  |
| Tata Metaliks Ltd         | CROSSEAS CAPITAL SERVICES PVT. LTD.       | BUY      | 196531   | 144.40  |
| Tata Metaliks Ltd         | JMP SECURITIES PVT LTD                    | BUY      | 419357   | 150.79  |
| Tata Metaliks Ltd         | OM INVESTMENTS                            | BUY      | 221817   | 143.86  |
| ARSS Infra Proj. Ltd      | MANIPUT INVESTMENTS PVT. LTD.             | SELL     | 94015    | 1204.01 |
| Austral Coke & Projects L | SAAKSHI SHARES PVT.LTD.                   | SELL     | 3014562  | 7.41    |
| Glory Polyfilms Limited   | HANSABEN HASMUKHBHAI AMIN                 | SELL     | 362876   | 15.81   |
| Insecticides (India) Limi | CROSSEAS CAPITAL SERVICES PVT. LTD.       | SELL     | 121275   | 182.34  |
| Tata Metaliks Ltd         | CROSSEAS CAPITAL SERVICES PVT. LTD.       | SELL     | 196972   | 144.43  |
| Tata Metaliks Ltd         | JMP SECURITIES PVT LTD                    | SELL     | 216851   | 150.66  |
| Tata Metaliks Ltd         | OM INVESTMENTS                            | SELL     | 221820   | 143.99  |

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

| <b>NAME</b>        | <b>CLIENT NAME</b>                               | <b>BUY/SELL</b> | <b>QUANTITY</b> | <b>PRICE</b> |
|--------------------|--|-----------------|-----------------|--------------|
| Arss Infra Proj    | SMART EQUITY BROKERS PRIVATE LIMITED             | BUY             | 77695           | 1194.93      |
| Arss Infra Proj    | OPG SECURITIES P LTD                             | BUY             | 141164          | 1187.35      |
| Birla Shloka       | APURVA COMMODITIES PRIVATE LIMITED               | BUY             | 76000           | 72.13        |
| Chemcel Bio        | ACME FURNITURE PRIVATE LIMITED                   | BUY             | 210000          | 8.58         |
| Gennex Lab         | BASICS SOFTSOLUTIONS PRIVATE LIMITED             | BUY             | 1311000         | 1.70         |
| Innovative Tech    | RAJ FINVEST                                      | BUY             | 40378           | 13.24        |
| Innovative Tech    | CHIMANLAL MANEKLAL SECURITIES PVT.LTD            | BUY             | 39551           | 13.71        |
| Insecticides India | SMART EQUITY BROKERS PRIVATE LIMITED             | BUY             | 80019           | 182.49       |
| Insecticides India | CROSSEAS CAPITAL SERVICES PRIVATE LIMITED        | BUY             | 121303          | 182.10       |
| Insecticides India | OPG SECURITIES P LTD                             | BUY             | 66889           | 183.20       |
| Majestic Auto      | SURBHI INVESTMENTS & TRADING COMPANY PRIVATE LTD | BUY             | 120480          | 105.88       |
| Omnitex Inds       | CHARLIE FINANCE PVT LTD                          | BUY             | 80000           | 7.40         |
| Oregon Comm        | VIPUL VIRENDRAKUMAR PATEL                        | BUY             | 5000            | 356.60       |
| Oregon Comm        | RAKESH RASIKLAL KHARSANI                         | BUY             | 5000            | 356.58       |
| Oregon Comm        | NILESH SURESHBHAJ SHAH                           | BUY             | 10000           | 356.65       |
| Arss Infra Proj    | SMART EQUITY BROKERS PRIVATE LIMITED             | SELL            | 77695           | 1195.58      |
| Arss Infra Proj    | OPG SECURITIES P LTD                             | SELL            | 141164          | 1187.80      |
| Ashirwad Cap       | SWASTI VINAYAKA INVESTECH LIMITED                | SELL            | 200000          | 2.70         |
| Chhattisgarh Inds  | ASIAN CAPITAL MARKET LIMITED                     | SELL            | 115021          | 9.10         |
| Insecticides India | SMART EQUITY BROKERS PRIVATE LIMITED             | SELL            | 80019           | 182.45       |
| Insecticides India | CROSSEAS CAPITAL SERVICES PRIVATE LIMITED        | SELL            | 121303          | 182.15       |
| Insecticides India | OPG SECURITIES P LTD                             | SELL            | 66889           | 183.22       |
| Jaihind Syn        | DEENA RASIK AJMERA                               | SELL            | 33901           | 11.25        |
| Kosian Inds        | VENILAXMI INVESTMENT PRIVATE LIMITED             | SELL            | 21200           | 5.61         |
| Omnitex Inds       | PIRAMAL SONS PVT LTD                             | SELL            | 80000           | 7.40         |
| Ranklin Sol        | RAMA VENKAT BALA ATMURI                          | SELL            | 41703           | 86.76        |
| Rotam Comm         | RASIKLAL BHAGWANJI PANDYA                        | SELL            | 6400            | 90.00        |
| Seax Global        | YOGESH JESHINGBHAJ SHAH                          | SELL            | 93658           | 42.85        |
| Shakti Metdor      | ANIL KUMAR GOEL                                  | SELL            | 20700           | 204.75       |
| Supertex Inds      | PARAMESHWAR EXPORTS PRIVATE LIMITED              | SELL            | 931127          | 2.24         |

### Today's Recommendation from our Research desk

| STOCK   | RECO | CMP   | NET RATE | SL    | EXIT PR | NET RATE | STATUS    | LOT SIZE | P/L             | MARGIN     | RETURN |
|---------|------|-------|----------|-------|---------|----------|-----------|----------|-----------------|------------|--------|
| EXIDE   | BUY  | 124   | 124.09   | 122.5 | 122.5   | 122.41   | TRIGGERED | 806      | (1,348.83)      | 100,000.00 | (1.35) |
| CIPLA   | BUY  | 339   | 339.24   | 336.5 | 342     | 341.76   | HIT       | 295      | 744.34          | 100,000.00 | 0.74   |
| BPCL    | SELL | 546   | 545.62   | 550.5 | 540.5   | 540.88   | HIT       | 183      | 868.03          | 100,000.00 | 0.87   |
| RANBAXY | BUY  | 432   | 432.30   | 427.5 | 433     | 432.70   | AT PAR    | 231      | 91.32           | 100,000.00 | 0.09   |
| MPHASIS | BUY  | 575.5 | 575.90   | 570.5 | 582.5   | 582.09   | HIT       | 174      | 1,075.48        | 100,000.00 | 1.08   |
| BIOCON  | BUY  | 298.5 | 298.71   | 296.5 | 302.5   | 302.29   | HIT       | 335      | 1,199.10        | 100,000.00 | 1.20   |
| MPHASIS | BUY  | 584.5 | 584.91   | 579.5 | 579.5   | 579.09   | TRIGGERED | 171      | (994.83)        | 100,000.00 | (0.99) |
|         |      |       |          |       |         |          |           |          | <b>1,634.60</b> |            |        |

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