

MARKET SUMMARY

Intraday Nifty chart


MARKET AT A GLANCE

	Close	% Chg	
SENSEX	16254.20	0.01	▼
S&P CNX NIFTY	4859.75	0.02	▲
MIDCAP	6305.06	0.40	▼
CD	3964.66	0.19	▲
REALTY	3196.34	0.11	▲
IT	5188.92	0.55	▲
BANKEX	9611.58	0.29	▲
OIL&GAS	9493.53	1.05	▼
METAL	15989.77	0.16	▼
FMCG	2723.29	0.83	▼
CNX NIFTY JUNIOR	9918.35	0.18	▼
CNX MIDCAP	7048.85	0.58	▼
CNX IT	5782.10	0.04	▲
CNX 100	4798.85	0.01	▼
BANK NIFTY	8537.80	0.39	▲
MARKET TURNOVER	101000	Cr	



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The markets exhibited extreme volatility on the expiry session and above all the Union Budget to be placed tomorrow. The markets exhibited a cautious outlook on the back of the economic survey 2009-10. The cues from the foreign indices were also negative which could not help things. From the sectoral front, buying was seen in CG, IT, Teck, Bankex and CD stocks while Oil&Gas, FMCG, Metal and PSU stocks witnessed selling pressure. BSE Midcap and Smallcap stocks closed with losses. The BSE Sensex closed lower by 1.77 points at 16,254.20 and NSE Nifty ended higher by 1.15 points at 4,859.75. BSE Midcap and Small cap closed with loss of 25.17 and 14.03 points at 6,305.06 and 7,980.95 respectively. The BSE Sensex touched intraday high of 16,329.33 and intraday low of 16,167.13.

Major gainers from the BSE Sensex pack were ONGC 0.72%, L&T 2.47%, ACC 0.15% and Infosys 1.37%. Losers were Tata Motors 2.69%, NTPC 2.03%, RIL 1.31%, HDFC 1.07% and ITC 0.08%.

14 stocks ended in green territory and 16 in red. The market breadth remained negative as 1521 stocks closed in red, 1278 stocks closed in green and 100 stocks remained unchanged.

Realty index ended higher by 0.11%. The main gainers were Ansal Prop 1.61%, Sobha Dev 3.15% and DLF 0.14%.

Bank index gained by 0.29%. The main gainers were ICICI bank 1.13%, BOB 1.09%, Kotak Mahindra Bank 3.17% and Oriental bank 1.71%.

PSU index was lower by 0.15%. The main losers were Andhra Bank 3.54%, IOB 0.97%, BEML 3.37%, BPCL 2.69%, and HPCL 2.07%.

Metal Index lost by 0.16%. The main losers were Ispat Inds 1.89%, Hindalco Inds 1.29%, Tata Steel 0.01% and NMDC 0.37%.

Oil & Gas index closed down by 1.05%. The main losers were BPCL 2.69%, HPCL 2.07% and RIL 1.31%.

Capital Goods index gained by 1.27%. Thermax 3.25%, L & T 2.47%, BHEL 0.93% and Usha Martin 1.66% ended in green.

Sterlite Technologies gained 0.92% to Rs 393.50 at 15:50 IST on BSE, after the company fixed 10 March 2010 as the record date for a liberal 1:1 bonus issue and subdivision of equity shares from Rs 5 each to Rs 2 each.

Mid-sized Indian IT services provider Mphasis Ltd reported a 28 per cent rise in its quarterly ended net profit which rose to Rs 2.68 billion from 2.1 billion a year ago.

The Union Finance Minister stated that the financial year 2009-10 was ending with clear signs of economic rebound and the growth would rise to about 8.5 per cent in the next fiscal. On the other hand core infrastructure industries grew by a robust 9.4 per cent in January against meagre 2.2 per cent in the year-ago period reflecting the sound state of recovery in industrial production. As per date available six key sectors – crude, petroleum refinery products, coal, electricity, cement, finished steel – showed a growth of 5.4 per cent in April-January 2009-10 against 3 per cent in the same period last year.

On the global front most of the Asian indices ended in the red. Seoul Composite, Hang Seng, Singapore's Straits ended down while Shanghai Composite ended in the green. The European indices were reported to be trading in the red when reports last came in.

Advances/ Declines (BSE)

	A	B	S	Total
Advances	88	841	198	1127
Declines	113	984	239	1336
AD Ratios	0.78	0.85	0.83	0.84

FOREX

Rs/\$	46.36
Rs/Euro	62.42

DII / FII position

FII (24/02)(PROV)	485.54 Cr (+)
DII (23/02)(PROV)4	154.67 Cr (-)

Most Active Futures Contracts on Individual Securities (25/02/2010)

Symbol	Exp Date	No of Contracts
RELIANCE	25-Feb-2010	22145
RELIANCE	25-Mar-2010	21529
SBIN	25-Mar-2010	18299
SBIN	25-Feb-2010	18154
ICICIBANK	25-Feb-2010	16435
TATASTEEL	25-Feb-2010	16122
DLF	25-Feb-2010	15249
ICICIBANK	25-Mar-2010	15128
TATASTEEL	25-Mar-2010	12977
RCOM	25-Mar-2010	12680

Most Active Option Contracts on Individual Securities (25/02/2010)

Symbol	Exp Date	Strike Price	Option Type	No of Contract
SBIN	25-Mar-2010	2000	CA	2002
UNITECH	25-Feb-2010	70	CA	1968
TATASTEEL	25-Feb-2010	560	CA	1719
TATASTEEL	25-Feb-2010	560	PA	1552
BHEL	25-Mar-2010	2370	CA	1352
BHEL	25-Mar-2010	2370	PA	1347
HINDALCO	25-Feb-2010	155	CA	1229
RELIANCE	25-Feb-2010	980	CA	1196
ICICIBANK	25-Feb-2010	840	CA	1185
INFOSYSTCH	25-Mar-2010	2600	CA	1184

NSE TOP GAINERS:

Scripts	Today's Close	Previous Close	Change (%)
SICAL	86.20	74.95	15.01
LIBERTSHOE	100.40	90.25	11.25
UNIENTER	34.30	31.00	10.65
INDBANK	14.95	13.55	10.33
BATAINDIA	204.20	185.65	9.99
VINYLINDIA	7.50	6.90	8.70
CHEMPLAST	8.85	8.20	7.93
VITLINFO	10.25	9.55	7.33
DYNACONS	0.80	0.75	6.67
LCCINFOTEC	0.80	0.75	6.67

NSE TOP LOSERS:

Scripts	Today's Close	Previous Close	Change (%)
HATHWAY	211.00	240.00	12.08
MINDAIND	274.50	300.95	8.79
MPHASIS	676.95	734.80	7.87
GILLETTE	1240.10	1345.95	7.86
LAOPALA	37.50	40.50	7.41
APPAPER	81.75	88.05	7.16
ANIKINDS	55.15	59.35	7.08
PANORAMUNI	286.25	306.55	6.62
CREATIVEYE	7.45	7.95	6.29
SRGINFOTEC	0.75	0.80	6.25

NSE BULK DEAL (24/02/2010):

NAME	CLIENT NAME	BUY/SELL	QUANTITI	PRICE
Aqua Logistics Ltd	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	139405	243.81
Aqua Logistics Ltd	BP FINTRADE PRIVATE LIMITED	BUY	101838	244.09
Aqua Logistics Ltd	GENUINE STOCK BROKERS PVT LTD	BUY	137729	240.61
D B Realty Limited	JANUS CONTRARIAN FUND	BUY	1842819	439.78
DHAMPUR SUGAR MILLS	COGENT CORPORATE INFRASTRUCTURE PVT LTD	BUY	302040	100.75
Emmbi Polyarns Ltd	A K G SECURITIES AND CONSULTANCY LTD.	BUY	96231	30.26
Emmbi Polyarns Ltd	A TO Z STOCK TRADE PRIVATE LIMITED	BUY	283781	36.23
Emmbi Polyarns Ltd	A-ONE B S LAKHOTIA SECURITY	BUY	86413	42.37
Kalindee Rail Nirman (Eng	ARCADIA SHARE & STOCK BROKERS PRIVATE LIMITED	BUY	65185	188.53
Kalindee Rail Nirman (Eng	OM INVESTMENTS	BUY	187258	188.60
Kotak Nifty ETF	KOTAK SECURITIES LTD.	BUY	33421	486.06
Syncom Healthcare Ltd	BP FINTRADE PRIVATE LIMITED	BUY	131337	86.36
Syncom Healthcare Ltd	MANISH VRAJLAL SARVAIYA	BUY	89881	79.39
Thangamayil Jewellery Ltd	TEAM INDIA MANAGERS LIMITED	BUY	6507	63.84
Titagarh Wagons Limited	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	103624	401.31
Aqua Logistics Ltd	GENUINE STOCK BROKERS PVT LTD	SELL	137879	241.29
Aqua Logistics Ltd	LISTO HOLDINGS PRIVATE LIMITED	SELL	122559	241.19
Aqua Logistics Ltd	MANIPUT INVESTMENTS PVT. LTD.	SELL	116536	244.79
DHAMPUR SUGAR MILLS	COGENT CORPORATE INFRASTRUCTURE PVT LTD	SELL	708	102.40
DHAMPUR SUGAR MILLS	COGENT CORPORATE PATHFINDERS LTD.	SELL	277609	100.76
Emmbi Polyarns Ltd	A K G SECURITIES AND CONSULTANCY LTD.	SELL	96231	30.29
Emmbi Polyarns Ltd	A TO Z STOCK TRADE PRIVATE LIMITED	SELL	283781	36.09
Emmbi Polyarns Ltd	A-ONE B S LAKHOTIA SECURITY	SELL	86413	42.45
Fame India Limited	THIRDWAVE BUSINESS AIDS PVT. LTD.	SELL	390000	87.40
Kalindee Rail Nirman (Eng	ARCADIA SHARE & STOCK BROKERS PRIVATE LIMITED	SELL	65685	188.39
Kalindee Rail Nirman (Eng	OM INVESTMENTS	SELL	187398	188.79
Thangamayil Jewellery Ltd	TEAM INDIA MANAGERS LIMITED	SELL	73099	64.06
Titagarh Wagons Limited	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	SELL	103624	401.01
Titagarh Wagons Limited	C D INTEGRATED SERVICES LTD.	SELL	121157	389.61

BSE BULK DEAL (24/02/2010):

NAME	CLIENT NAME	BUY/SELL	QUANTITY	PRICE
AQUA LOGIST	GENUINE STOCK BROKERS PVT. LTD.	BUY	143018	242.14
AQUA LOGIST	SMART EQUITY BROKERS PRIVATE LIMITED	BUY	165705	242.48
AQUA LOGIST	PINAC STOCK BROKERS PVT LTD	BUY	139025	248.97
Birla Shloka	TALISMAN SECUTIRIES PVT LTD	BUY	139076	50.00
EMMBI POLY	ALPHA PORT SERVICES PRIVATE LIMITED	BUY	1485831	46.73
EMMBI POLY	AUM SECURITIES PVT. LTD	BUY	145154	41.48
EMMBI POLY	ALIVE CONSULTANTS	BUY	398505	39.49
Fert & Chem Trv	TRANSGLOBAL SECURITIES LTD.	BUY	43315	53.52
Hercules Hoist	BAJAJ AUTO HOLDINGS LIMITED	BUY	425000	221.06
Kalindi Rail	LATIN MANHARLAL SEC.PVT.LTD.	BUY	86505	188.67
KAY Power	BAMPSL SECURITIES LTD	BUY	349061	17.52
Titagarh Wag	GENUINE STOCK BROKERS PVT. LTD.	BUY	306090	395.90
Titagarh Wag	SMART EQUITY BROKERS PRIVATE LIMITED	BUY	183768	390.80
Titagarh Wag	MARWADI SHARES AND FINANCE LTD.	BUY	108265	394.88
Titagarh Wag	OPG SECURITIES P LTD	BUY	127455	394.46
AQUA LOGIST	GENUINE STOCK BROKERS PVT. LTD.	SELL	143018	241.62
AQUA LOGIST	SMART EQUITY BROKERS PRIVATE LIMITED	SELL	165705	242.82
AQUA LOGIST	PINAC STOCK BROKERS PVT LTD	SELL	139025	247.18
Birla Shloka	SARSWATI VINCOM LTD	SELL	108184	49.33
EMMBI POLY	REGENT FINANCE CORPORATION PVT. LTD.	SELL	200000	45.52
EMMBI POLY	VENTURE BROKING PVT. LTD	SELL	87218	45.75
Fert & Chem Trv	TRANSGLOBAL SECURITIES LTD.	SELL	43315	53.73
Hind Rectifiers	ANGEL INFIN PRIVATE LIMITED	SELL	38990	69.54
Kalindi Rail	LATIN MANHARLAL SEC.PVT.LTD.	SELL	86505	189.00
Loyal Textile	ULKA SECURITIES PVT LTD	SELL	30000	174.00
SYNCOM HEAL	OPG SECURITIES P LTD	SELL	92346	81.86
Titagarh Wag	VISHAL KISHORE BHATIA	SELL	308731	385.98
Titagarh Wag	INVENTURE COMMODITIES LIMITED	SELL	330480	406.48
Unisys Soft	WINSHER SALES PVT LIMITED	SELL	265000	19.82
Vikas Globalone	SUPER PLASTIC COATS	SELL	197604	29.25

Today's Recommendation Follow-up:

STOCK	RECO	CMP	NET RATE	SL	EXIT PR	NET RATE	STATUS	LOT SIZE	P/L	MARGIN	RETURN
TATA MOTORS	SELL	679.25	678.77	688.50	671.00	671.47	HIT	147	1,075.43	100,000.00	1.08
BHEL	SELL	2,330.00	2,328.37	2,346.50	2,346.50	2,348.14	TRIGGERED	43	(848.65)	100,000.00	(0.85)
TATA STEEL	SELL	564.90	564.50	570.50	560.90	561.29	HIT	177	568.59	100,000.00	0.57
JINDAL STEEL	BUY	621.50	621.94	616.50	627.50	627.06	HIT	161	824.73	100,000.00	0.82
DIVIS LAB	BUY	607.15	607.58	602.45	612.80	612.37	HIT	165	789.93	100,000.00	0.79
HERO HONDA	SELL	1,650.00	1,648.85	1,661.50	1,650.00	1,651.16	AT PAR	61	(140.00)	100,000.00	(0.14)
GVK POWER CROMPTON GREAVES	BUY	42.20	42.23	41.10	42.90	42.87	HIT	2,370	1,517.61	100,000.00	1.52
RELIANCE	BUY	409.20	409.49	404.50	414.35	414.06	HIT	244	1,117.67	100,000.00	1.12
JINDAL STEEL	SELL	967.00	966.32	977.50	970.00	970.68	AT PAR	103	(450.46)	100,000.00	(0.45)
JINDAL STEEL	BUY	631.00	631.44	626.50	626.50	626.06	TRIGGERED	158	(852.65)	100,000.00	(0.85)
									<u><u>3,602.19</u></u>		

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