

MARKET SUMMARY

Intraday Nifty chart



The markets gave a thumbs up to the Union Budget and moved upwards strongly though it later gave up much of the gains towards the later half of the day. The thrust of infrastructure spending, raising of tax slabs rates and the partial roll back in the stimulus as expected had a positive effect on the indices. From the sectoral front, most of the buying was seen in Auto, Metal, Bankex, HC, and Realty and Oil&Gas stocks. FMCG and IT witnessed most of the selling pressure. BSE Midcap and Smallcap stocks closed with gain. The BSE Sensex closed higher by 175.35 points at 16,429.55 and NSE Nifty ended higher by 62.55 points at 4,922.30. BSE Midcap and Small cap closed with gain of 92.76 and 86.45 points at 6,397.82 and 8,067.40 respectively. The BSE Sensex touched intraday high of 16,669.25 and intraday low of 16,249.67.

Major gainers from the BSE Sensex pack were Tata Motors 6.33%, SBI 3.21%, L&T 1.95%, DLF 2.73% and Hero Honda 4.99%. Losers were ITC 6.17%, Tata Power 4.12%, BHEL 0.97%, and TCS 0.75%

25 stocks ended in green territory and 5 in red. The market breadth was positive as 1848 stocks closed in green, 942 stocks closed in red and 84 stocks remained unchanged.

Realty index ended higher by 1.26%. The main gainers were Omaxe 2.89%, Ansal Prop 0.79%, HDIL 2.73% and DLF 2.73%.

Bank index gained by 2.26%. The main gainers were Yes Bank 5.27%, ICICI bank 2.40%, BOB 2.30%, Kotak Mahindra Bank 1.62% and IOB 1.73%.

PSU index was higher by 1.05%. The main gainers were Andhra Bank 3.67%, IOB 1.73%, REC 5.72%, SAIL 3.26%, and PNB 2.59%

Metal Index gained by 2.58%. The main gainers were Ispat Inds 3.31%, Hindalco Inds 5.39%, Tata Steel 1.11% and SAIL 3.26%.

Oil & Gas index closed higher by 1.08%. The main gainers were ONGC 0.80%, Cairn India 3.22% and RIL 1.42%.

Capital Goods index gained by 1.06%. The main gainers were Suzlon Energy 4.74%, Thermax 1.11%, L & T 1.95%, Siemens 2.76% and Usha Martin 0.58%.

ITC plunged 5.58% to Rs 233.50 at 15:42 IST on BSE, after Finance Minister Pranab Mukerjee raised excise duties on smoking and non-smoking tobacco products in the Union Budget 2010-2011.

ABB declined 1.26% to Rs 797.80 at 15:45 IST on BSE, after net profit slumped 35.21% to Rs 354.64 crore on 9.44% fall in total income to Rs 6309.77 crore in the year ended December 2009 over the year ended December 2008.

Oil Companies have already announced a hike in prices of petrol and diesel by Rs 2.67 a litre and Rs 2.58 per litre, respectively. Customs duty on petrol and diesel were hiked to 7.5 per cent from 2.5 per cent while excise duty was raised by Re one a litre to Rs 14.35 and Rs 4.60 per litre on non-branded (normal) petrol and diesel respectively.

The government has laid down concrete plans for reduction of the fiscal deficit to 5.5% of GDP in FY 10-11 and to 4.8% in FY 11-12.

On the global front all the major Asian indices ended in the green. The European indices were also trading in the green when reports last came in.

MARKET AT A GLANCE

	Close	% Chg	
SENSEX	16429.55	1.08	▲
S&P CNX NIFTY	4922.30	1.29	▲
MIDCAP	6397.82	1.47	▲
CD	4001.78	0.94	▲
REALTY	3236.69	1.26	▲
IT	5173.99	0.29	▼
BANKEX	9828.68	2.26	▲
OIL&GAS	9596.24	1.08	▲
METAL	16401.52	2.58	▲
FMCG	2662.05	2.25	▼
CNX NIFTY JUNIOR	10099.85	1.83	▲
CNX MIDCAP	7167.25	1.68	▲
CNX IT	5766.70	0.27	▼
CNX 100	4864.80	1.37	▲
BANK NIFTY	8722.75	2.17	▲
MARKET TURNOVER	140807	Cr	



www.16anna.com
 Contact us:
info@guinnessonline.net

Advances/ Declines (BSE)

	A	B	S	Total
Advances	167	1192	296	1655
Declines	36	631	130	797
AD Ratios	4.64	1.89	2.28	2.08

FOREX

Rs/\$	46.23
Rs/Euro	62.81

DII / FII position

FII (25/02)(PROV)	594.78 Cr (-)
DII (25/02)(PROV)4	325.92 Cr (+)

Most Active Futures Contracts on Individual Securities (26/02/2010)

Symbol	Exp Date	No of Contracts
RELCAPITAL	25-Mar-2010	45004
SBIN	25-Mar-2010	37393
DLF	25-Mar-2010	36144
ICICIBANK	25-Mar-2010	28009
RELIANCE	25-Mar-2010	26622
HDIL	25-Mar-2010	23367
UNITECH	25-Mar-2010	22577
TATAMOTORS	25-Mar-2010	21739
RANBAXY	25-Mar-2010	19277
ITC	25-Mar-2010	18768

Most Active Option Contracts on Individual Securities (26/02/2010)

Symbol	Exp Date	Strike Price	Option Type	No of Contract
IFCI	25-Mar-2010	50	CA	2545
IFCI	25-Mar-2010	55	CA	1998
UNITECH	25-Mar-2010	75	CA	1987
SBIN	25-Mar-2010	2000	CA	1983
RELIANCE	25-Mar-2010	1000	CA	1914
ICICIBANK	25-Mar-2010	880	CA	1367
DLF	25-Mar-2010	300	CA	1239
SUZLON	25-Mar-2010	75	CA	1181
UNITECH	25-Mar-2010	70	CA	1017
SUZLON	25-Mar-2010	70	CA	945

NSE TOP GAINERS:

Scripts	Today's Close	Previous Close	Change (%)
BATAINDIA	235.00	205.45	14.38
JMTAUTOLD	62.50	55.15	13.33
DHANBANK	141.00	124.75	13.03
MINDAIND	309.95	277.10	11.85
IFBAGRO	81.00	73.20	10.66
HARITASEAT	85.65	77.85	10.02
EVINIX	4.05	3.70	9.46
IFCI	51.50	47.40	8.65
SAKUMA	14.10	13.00	8.46
SIMPLEXINF	459.75	424.20	8.38

NSE TOP LOSERS:

Scripts	Today's Close	Previous Close	Change (%)
LCCINFOTEC	0.75	0.80	6.25
DYNACONS	0.75	0.80	6.25
DHAMPURSUG	96.75	103.20	6.25
TWL	343.05	365.05	6.03
ITC	233.50	247.60	5.69
EMMBI	27.75	29.35	5.45
DBREALTY	427.70	450.55	5.07
HIRECT	61.70	64.95	5.00
KERNEX	136.95	144.15	4.99
KWALITY	161.00	169.45	4.99

NSE BULK DEAL (25/02/2010):

NAME	CLIENT NAME	BUY/SELL	QUANTITI	PRICE
Emmbi Polyarns Ltd	A K G SECURITIES AND CONSULTANCY LTD.	BUY	132991	30.09
Emmbi Polyarns Ltd	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	BUY	577262	29.96
Emmbi Polyarns Ltd	AMBIT SECURITIES BROKING PVT. LTD.	BUY	108860	29.75
Emmbi Polyarns Ltd	ASHWIN COMMODITIES AND SHARES PVT. LTD.	BUY	90000	30.54
Emmbi Polyarns Ltd	AUM SECURITIES PRIVATE LTD.	BUY	168000	30.10
Emmbi Polyarns Ltd	CPR CAPITAL SERVICES LTD.	BUY	233328	29.98
Emmbi Polyarns Ltd	DEPANSU SECURITIES (INDIA) PVT LTD	BUY	156454	29.48
Emmbi Polyarns Ltd	GENUINE STOCK BROKERS PVT LTD	BUY	532784	30.39
Emmbi Polyarns Ltd	MARWADI SHARES AND FINANCE LIMITED	BUY	170723	30.50
Emmbi Polyarns Ltd	NAMAN SECURITIES & FINANCE PVT. LTD	BUY	298970	30.14
Emmbi Polyarns Ltd	OM INVESTMENTS	BUY	168910	30.04
Fame India Limited	RELIANCE CAPITAL PARTNERS	BUY	319879	83.11
Liberty Shoes Ltd	TRANSGLOBAL SECURITIES LTD.	BUY	93714	102.01
Syncom Healthcare Ltd	AUM SECURITIES PRIVATE LTD.	BUY	180250	94.19
Thangamayil Jewellery Ltd	BHARAT SECURITIES PVT LTD	BUY	100219	68.31
Emmbi Polyarns Ltd	A K G SECURITIES AND CONSULTANCY LTD.	SELL	132991	30.03
Emmbi Polyarns Ltd	ADROIT FINANCIAL SERVICES PRIVATE LIMITED	SELL	582262	29.90
Emmbi Polyarns Ltd	AMBIT SECURITIES BROKING PVT. LTD.	SELL	108860	29.82
Emmbi Polyarns Ltd	ASHWIN COMMODITIES AND SHARES PVT. LTD.	SELL	90000	30.58
Emmbi Polyarns Ltd	AUM SECURITIES PRIVATE LTD.	SELL	168000	29.51
Emmbi Polyarns Ltd	BAFNA RAMESH KUMAR	SELL	165000	29.83
Liberty Shoes Ltd	TRANSGLOBAL SECURITIES LTD.	SELL	93714	102.12
Orchid Chemicals Ltd.	MORAGAN STANLEY DEAN WITTER MAURITIUS COMPANY LTD	SELL	426300	162.98
Syncom Healthcare Ltd	GENUINE STOCK BROKERS PVT LTD	SELL	432200	93.98
Syncom Healthcare Ltd	LISTO HOLDINGS PRIVATE LIMITED	SELL	108050	93.51
Syncom Healthcare Ltd	MAHALAXMI BROKRAGE INDIA PRIVATE LIMITED	SELL	99431	93.48
Syncom Healthcare Ltd	MARWADI SHARES AND FINANCE LIMITED	SELL	131539	93.83
Syncom Healthcare Ltd	NIKON FINLEASE PVT. LTD	SELL	97205	93.34
Syncom Healthcare Ltd	OM INVSTMENTS	SELL	159912	93.46

BSE BULK DEAL (25/02/2010):

NAME	CLIENT NAME	BUY/SELL	QUANTITY	PRICE
ACI Infocom	SHREE HARIVANSH SEC PVT LTD	BUY	110000	27.09
ACI Infocom	JINAY INVESTMENT CO PVT LTD	BUY	50000	26.88
ACI Infocom	JINENDRA FISCAL PVT LTD	BUY	60000	27.10
Birla Shloka	ARISTRO FINANCIAL SERVICES LTD.	BUY	64850	53.38
Birla Shloka	ARIHANT SEC & INVESTMENT	BUY	76834	51.95
Birla Shloka	TALISMAN SECUTIRIES PVT LTD	BUY	111199	53.39
EMMBI POLY	SMART EQUITY BROKERS PRIVATE LIMITED	BUY	124779	30.73
EMMBI POLY	TRANSGLOBAL SECURITIES LTD.	BUY	99421	30.53
Fame India	RELIANCE CAPITAL PARTNERS	BUY	274682	83.11
Gokak Textiles	INDIA DISCOVERY FUND LIMITED	BUY	95033	45.00
KAY Power	BAMPSL SECURITIES LTD	BUY	251252	17.42
Sanjivani Par	PRABHUDAS LILLADHAR PVT LTD	BUY	54322	60.48
Birla Shloka	ARISTRO FINANCIAL SERVICES LTD.	SELL	64850	53.24
Birla Shloka	ARIHANT SEC & INVESTMENT	SELL	76834	53.14
EMMBI POLY	SMART EQUITY BROKERS PRIVATE LIMITED	SELL	124779	30.73
Exelon Infra	ANGEL INFIN PRIVATE LIMITED	SELL	39080	20.40
Exelon Infra	DYNAMIC STOCK BROKING INDIA PVT LTD	SELL	24507	21.46
Fame India	MONEY MATTERS ADVISORY SERVICES LIMITED	SELL	355847	83.91
Gokak Textiles	GHEVAR INVESTMENTS AND TRADING COMPANY PRIVATE LIMITED	SELL	95000	45.00
KAY Power	BAMPSL SECURITIES LTD	SELL	349061	17.18
Exelon Infra	ANGEL INFIN PRIVATE LIMITED	SELL	39080	20.40
Rama Pulp	GAJRIA JAYNA PRECISION INDVSTRIES PRIVATE LIMITED	SELL	49000	31.35
Sanjivani Par	Naman Securities & Finance Pvt. Ltd.	SELL	35142	59.92

Today's Recommendation Follow-up:

STOCK	RECO	CMP	NET RATE	SL	EXIT PR	NET RATE	STATUS	LOT SIZE	P/L	MARGIN	RETURN
IOC	BUY	327.00	327.23	322.50	331.00	330.77	HIT	306	1,082.39	100,000.00	1.08
GVK POWER	BUY	43.30	43.33	42.50	44.40	44.37	HIT	2,309	2,398.64	100,000.00	2.40
IDFC	BUY	155.80	155.91	154.50	158.00	157.89	HIT	642	1,271.08	100,000.00	1.27
LITL	BUY	45.60	45.63	44.90	46.70	46.67	HIT	2,193	2,270.59	100,000.00	2.27
SESA GOA	BUY	388.50	388.77	384.50	394.00	393.72	HIT	257	1,274.71	100,000.00	1.27
NIFTY (5000 PE)	BUY	120.00	120.08		157.00	156.89	HIT	50	1,840.31	6,000.00	30.67
DIVIS LAB	BUY	620.00	620.43	614.50	635.90	635.45	HIT	161	2,422.72	100,000.00	2.42

12,560.43

Research Analyst: Pinaki Banerjee
E Mail Id: pinaki.banerjee@guinnessonline.net
Contact No. 033-3001-5555, Extn.5509

Disclaimer

This Document has been prepared by the Research Team of Guinness Securities Ltd. and it is only meant for the use of the recipients only & it is strictly restricted for circulation without prior permission. Every care has been taken while preparing this document, however as the information contained herein is obtained from sources believed to be reliable hence we do not represent it, as accurate and it should not be relied upon as such. We do not take any responsibility for our research recommendation. Investors are advised to use their own judgment while taking any investment decision.

Registered Office: Suite no. 5, Rizvi Nagar, S.V. Road, Milan Subway, Santacruz (West), Mumbai- 400 054. (w.e.f. 1st April 2009)
Corporate Office: Guinness House. 18, Deshapriya Park Road, Kolkata-700 026. Ph: 3001-5555. Fax: 91 33 3001 5566.

Email: research@guinnessonline.net, Website: www.16anna.com