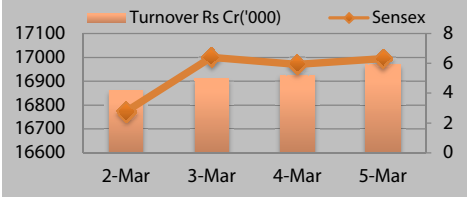
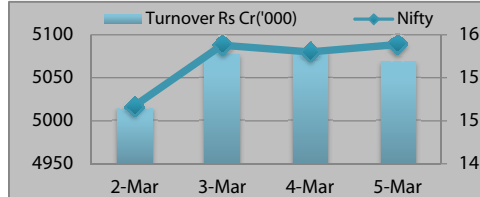


Weekly Newsletter

Volume: 1 | Issue: 49 | Mar 6, 2010



Open	16,438
High	17,097
Low	16,438
Close	16,994
Change	565
Vol (Lacs)	14,643
Turn (Rs Cr)	20,382



Open	4,935
High	5,119
Low	4,935
Close	5,089
Change	167
Vol (Lacs)	28,894
Turn (Rs Cr)	60,460

MARKET UPDATE

INDIA

The Indian equity markets ended the week on a higher note and had a good post budget rally. The BSE Sensex ended the week 3.45 percent higher at 16,994. The NSE Nifty also ended 3.39 percent higher at 5,089. The BSE Midcap was up by 5.28 percent and BSE Smallcap was up by 5.36 percent.

The top performing sector for the week was Metal followed by Realty and Auto. All the sectoral indices ended in the green.

GLOBAL MARKETS

US & Global indices ended on a positive note this week on the back mixed economic data.

The Dow Jones gained 2.3 percent to end at 10,566 the S&P 500 index closed 3.03 percent higher at 1,138 while the Nasdaq closed 3.92 percent higher at 2,326 this week.

INDIAN MARKET

	5-Mar	26-Feb	% Change
BSE Sensex	16,994	16,430	3.44
S&P CNX Nifty	5,089	4,922	3.39
BSE Midcap	6,735	6,397	5.28
BSE Smallcap	8,500	8,067	5.36
CNX Nifty Junior	10,665	10,099	5.60
CNX Midcap	7,585	7,167	5.82

GLOBAL MARKETS

	5-Mar	26-Feb	% Change
Dow Jones Ind (USA)	10,566	10,325	2.33
Nasdaq Composite (USA)	2,326	2,238	3.92
S&P 500 (USA)	1,138	1,104	3.03
FTSE 100 (UK)	5,599	5,355	4.57
DAX (Germany)	5,877	5,598	4.98
Nikkei 225 (Tokyo)	10,368	10,126	2.39
Hang Seng (Hong Kong)	20,788	20,608	0.87
Shanghai Comp (China)	3,031	3,052	(0.69)
KOSPI (South Korea)	1,635	1,594	2.55
STI (Singapore)	2,790	2,750	1.45
MSCI Emerging Market	362	348	3.92
MSCI Frontier Market	526	519	1.27

DAILY COMMENTARY

Monday

Market was closed on account of 'Holi'.

Tuesday

Bombay Stock Exchange's Sensex ended at 16,772.56, up 343.01 points or 2.09 per cent. The index touched a high of 16,808.49 and low of 16,438.45 during the session. National Stock Exchange's Nifty closed the day at 5017, up 94.7 points or 1.92 per cent

Wednesday

Markets surged for the third straight day as a reaction to the just announced Union Budget last Friday. The Sensex rallied past the 17,000-mark, and touched a high of 17,012. It finally ended at 17,000 - up 227 points (1.3%). The Nifty, too displayed firm trend, and ended at 5,088 - up 71 points.

Thursday

Markets reversed the positive trend as a disappointing food inflation data and weak global indices took their toll on Thursday. The Sensex ended in red at 16,972 - down 28 points. The Nifty ended down eight points at 5,080.

Friday

The Sensex opened strong on cues from global markets and surged to a high of 17,098. However, index slipped 162 points from there to touch a low of 16,936 in noon trades. The Sensex, once again, recovered from the red on a positive outlook by Prime Minister Manmohan Singh about the country's GDP. The BSE benchmark finally ended with a gain of 22 points at 16,994. The Nifty added eight points to 5,089.

CURRENCY

	5-Mar	26-Feb	% Change
INR / USD	45.71	46.41	(1.51)
USD / Euro	1.36	1.34	1.49
Yen / USD	90.27	89.40	0.97

BOND MARKETS

	5-Mar	26-Feb	Change
10yr G-Sec Yield	7.97	7.86	0.11
1yr G-Sec Yield	5.35	5.01	0.34
LIBOR (6m)	0.39	0.39	0.00
LIBOR (1m)	0.22	0.23	(0.01)
Inter-bank Call Rate	3.2	3.2	(0.03)

VALUATIONS

	P/E	P/B	DIV YLD
BSE	20.8	3.8	1.1
NSE	21.6	3.6	1.0
BSE500 Mcap/GDP Ratio	0.71		

SECTOR

	5-Mar	26-Feb	% Change
Metal	17560	16402	7.1
Realty	3460	3237	6.9
Auto	7553	7171	5.3
FMCG	2783	2662	4.6
Power	3088	2962	4.2
Bankex	10199	9829	3.8
Consumer Durables	4128	4002	3.2
Capital Goods	13885	13475	3.0
Healthcare	5050	4913	2.8
Teck	3256	3179	2.4
Oil & Gas	9767	9596	1.8
PSU	9324	9214	1.2
IT	5229	5174	1.1

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Weekly Newsletter



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Light Sweet Crude Oil gained 7.8 percent this week closing at \$81.5 from \$75.6 per barrel last week. Gold closed 1 percent higher at Rs 16,915 while Silver closed 2.6 percent higher at Rs 26,740 in the Indian market respectively.

COMMODITY	5-Mar	26-Feb	Change	% Change
Crude Oil (USD/bbl)	81.5	75.6	5.9	7.8
Gold (Rs/10 gm)	16,915.0	16,755.0	160	1.0
Silver (Rs/kg)	26,740.0	26,055.0	685	2.6

SECTORAL ANALYSIS

Sectoral Performance Analysis

BSE Metal

The BSE Metal Index was the top gainer this week gaining 7.1 percent. Top gainer in this index was Gujarat NRE Coke gaining a strong 20.1 percent upmove followed by JSW Steel on back of strong steel output numbers gaining 11.7 percent. Some other gainers were Sesa Goa, Jindal steel gaining in range of 9.6-11.6 percent.

TOP PERFORMING SECTORS

BSE Metal Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Guj NRE Coke	87.6	72.95	20.1	220,251
JSW Steel	1196.2	1071	11.7	36,117
Sesa Goa	446.2	399.95	11.6	176,736
Welsp.Guj.Stahl	266	240.9	10.4	105,287
Jindal Steel	694.5	633.4	9.6	55,407

BSE Realty

The BSE Realty Index was up by 6.9 percent this week. Top gainer in this index was Ackruti City gaining 9.6 percent for the week followed by Sobha Developers gaining 9.1 percent for the week. Some other gainers were Orbit Corp, IB Real, Unitech, HDIL gaining in range of 6.5-8.5 percent.

BSE Realty Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Ackruti City	531.4	484.95	9.6	86,136
Sobha Developer.	277.15	254	9.1	6,681
Indbull.RealEst.	174.45	160.1	9.0	404,963
Orbit Corpn.	261.55	240.9	8.6	92,652
Unitech	77.65	71.8	8.1	1,365,711
Ansal Properties	75.5	69.9	8.0	95,408
HDIL	321.05	301.15	6.6	240,178

BSE Auto

The BSE Auto index was up 5.3 percent this week. Frontline gainers were Escorts gaining 14.9 percent at close followed by Tata Motors backed by strong sales number gaining 11.8 percent at close. Some other gainers in the index was Ashok Leyland, Apollo Tyres and MRF gaining in range of 8-10 percent.

BSE Auto Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Escorts	149	129.65	14.9	44,982
Tata Motors	795.3	711.05	11.8	126,148
Ashok Leyland	54.7	49.75	9.9	136,393
Apollo Tyres	63.85	58.2	9.7	201,103
MRF	6112.1	5660.95	8.0	1,250

BSE FMCG

The BSE FMCG index was up by 4.6 percent. Some gainers in this index were United Spirits gaining solid 9.4 percent followed by Britannia Industries gaining 5.7 percent. Some other gainers in this index were ITC, United Breweries and Godrej Consumer gaining in range of 4-5.5 percent.

BSE FMCG Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
United Spirits	1490.05	1361.55	9.4	26,420
Britannia Inds	1765.85	1671.3	5.7	1,169
ITC	244.55	232.05	5.4	381,843
United Breweries	185.15	178.05	4.0	251,531
Godrej Consumer	256.15	246.35	4.0	14,039

BSE Power

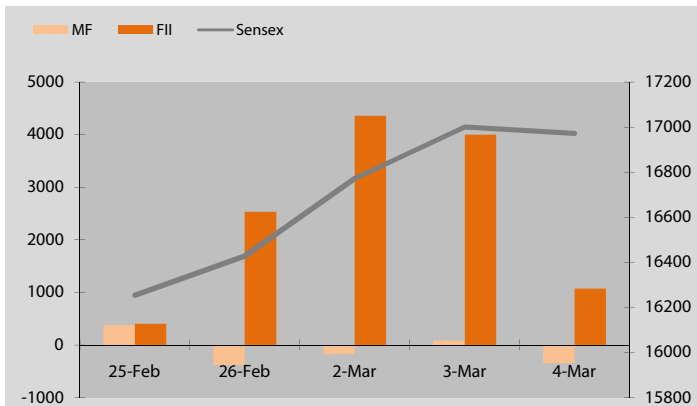
The BSE Power index was up by 4.2 percent. Some gainers were Suzlon energy post budget gaining 12 percent at close followed by Tata Power gaining 9.8 percent. Some other gainers were GMR Infra gaining 7.3 percent, Lanco Infratech and Crompton Greaves gaining above 6 percent for the week.

BSE Power Gainers	Price		% Return	Average Volume
	This Wk	Prev. Wk		
Suzlon Energy	80.45	71.8	12.0	1,019,550
Tata Power Co.	1331.6	1212.95	9.8	25,277
GMR Infra.	58.8	54.8	7.3	263,740
Crompton Greaves	442.35	415.55	6.4	95,091
Lanco Infratech	48.8	45.9	6.3	213,853

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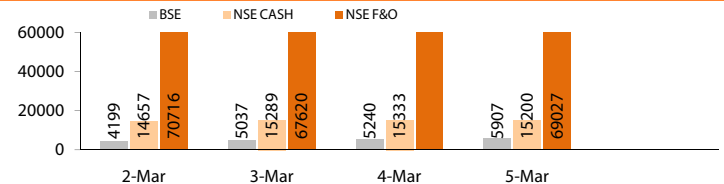
Weekly Newsletter

FII / MF ACTIVITY (Rs. Cr)



	25-Feb	26-Feb	2-Mar	3-Mar	4-Mar
FII Cash Net	-244	1094	1535	1013	692
FII Index Futures	-242	1560	1222	814	-728
FII Index Options	475	258	655	1486	1315
FII Stock Futures	322	-348	539	638	-196
FII Stock Options	91	-37	401	43	-14
FII Net	402	2527	4352	3994	1069
Open Interest	129726	88356	94348	100825	104006
Mutual Fund	378	-388	-180	83	-351

TURNOVER (Rs. Cr)



MOVERS & SHAKERS

TOP 5 FRONTLINE GAINERS			TOP 5 MIDCAP GAINERS			TOP 5 SMALLCAP GAINERS		
Name	Rs	%▲	Name	Rs	%▲	Name	Rs	%▲
Tata Motors	795.3	11.8%	Jet Airways	492.2	22.1%	Sulzer India	1243.7	56.1%
JP Associates	146.2	10.5%	Guj NRE Coke	87.6	20.1%	Ineos ABS (India)	216.9	24.5%
Tata Power Co.	1331.6	9.8%	U B Holdings	274.7	20.0%	Zenith Infotech	296.4	23.6%
Tata Steel	618.0	7.7%	D C Holdings	169.7	16.3%	Modern India	161.1	22.9%
Bharti Airtel	298.6	6.9%	Puravankar.Proj.	110.1	16.1%	Gokul Refoils	64.0	21.8%

TOP 5 FRONTLINE LOSERS			TOP 5 MIDCAP LOSERS			TOP 5 SMALLCAP LOSERS		
Name	Rs	%▼	Name	Rs	%▼	Name	Rs	%▼
O N G C	1095.0	-2.0%	Amtek Auto	171.0	-7.4%	Sh.Ashtavinayal	12.5	-11.1%
Maruti Suzuki	1457.2	-0.4%	Peninsula Land	78.6	-3.5%	Kwality Dairy	145.1	-9.9%
TCS	762.2	0.2%	Andrew Yule & Co	49.4	-2.9%	Rollatainers	202.1	-8.2%
Larsen & Toubro	1584.7	1.1%	Natl.Fertilizer	116.6	-2.7%	Ushdev Intl.	241.5	-6.9%
Infosys Tech.	2633.6	1.2%	Bajaj Finserv	338.4	-2.3%	Advani Hotels.	47.0	-5.6%

INSIDER UPDATES

Company	Name	Acquirer Designation	Transaction Date	BUY/SELL	No. of Shares Transacted	Holding after Transaction %
Bombay Rayon Fashions Ltd	Uday Mogre	Executive Director	18/01/2010	SELL	10000	0.03
Fact Enterprise Ltd	Merrill Lynch Capital Mkts	Strategic Investor	28/01/2010	SELL	35778	7.12
Garnet International Ltd	Indira Gaggar & PACs	Investor	05/02/10	BUY	6000	55.66
Gemstone Investments Ltd	Heena Varde	Investor	30/10/2009	BUY	400000	5.35
Gemstone Investments Ltd	Jaydeep Padalia	Investor	30/10/2009	BUY	400000	5.35
IndiaNivesh Ltd	Jupiter Enterprises Ltd	Strategic Investor	02/02/10	BUY	188702	-
KRONE Communications Ltd	ADC GmbH	Strategic Investor	01/02/10	BUY	6359	-
KRONE Communications Ltd	ADC GmbH	Strategic Investor	02/02/10	BUY	9000	-
KRONE Communications Ltd	ADC GmbH	Strategic Investor	03/02/10	BUY	10000	-
KRONE Communications Ltd	ADC GmbH	Strategic Investor	05/02/10	BUY	10000	-
Landmarc Leisure Corporation Ltd	Yashaswini Leisure Pvt Ltd	Strategic Investor	01/02/10	BUY	7900	6.7
Landmarc Leisure Corporation Ltd	Yashaswini Leisure Pvt Ltd	Strategic Investor	02/02/10	BUY	17500	6.7
Landmarc Leisure Corporation Ltd	Yashaswini Leisure Pvt Ltd	Strategic Investor	03/02/10	BUY	500	6.7
Landmarc Leisure Corporation Ltd	Yashaswini Leisure Pvt Ltd	Strategic Investor	04/02/10	BUY	6700	6.71
Landmarc Leisure Corporation Ltd	Yashaswini Leisure Pvt Ltd	Strategic Investor	05/02/10	BUY	14554	6.71
Prabhav Industries Ltd	Kavit Investments Pvt Ltd	Strategic Investor	--	SELL	40600	1.44
Veena Textiles Ltd	ICICI Equity Fund	Strategic Investor	--	SELL	360600	0
AIA Engineering Ltd	Bhadresh K Shah	Managing Director	11/02/10	SELL	283000	42.01
Cera Sanitaryware Ltd	Mahendra Kumar Bhandari	Investor	10/02/10	SELL	4545	0.05
Cinerad Communications Ltd	India Emerging Capital Pvt Ltd	Strategic Investor	09/02/10	BUY	227696	43.21

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