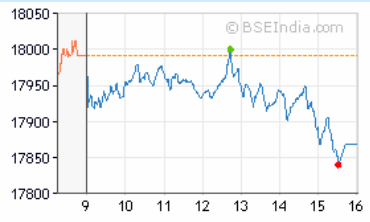




BSE Sensex



Open	17,981.06
High	18,000.35
Low	17,838.92
Close	17,868.29
Ch. (Pts)	-123.70
Ch. (%)	-0.69%

Nifty



Open	5,408.40
High	5,413.25
Low	5,349.20
Close	5,367.60
Ch. (Pts)	-41.30
Ch. (%)	-0.76%

Top Gainers (NSE)

Scrip	Price	Ch. (Points)	Ch. (%)
HCL Tech	392.2	14.15	3.74
Idea Cellular	70.6	1.95	2.84
Mah and Mah	661.5	17.6	2.73
Ranbaxy Labs	449.7	7.75	1.75
PNB	1,070.45	13.8	1.31

Top Losers (NSE)

Scrip	Price	Ch. (Points)	Ch. (%)
ABB	811.45	-36.65	-4.32
Bharti Airtel	306.8	-10.1	-3.19
Hero Honda	1,814.85	-59.45	-3.17
GAIL	438.5	-14.25	-3.15
Siemens	699.45	-21.6	-3

Market Turnover

Segment	No. of Trades	Turnover (Rs Cr)
NSE Cash	5842735	13358.65
NSE F&O	2514457	68419.88
Total NSE	8357192	81778.53

Market Breadth

Exchange	Adv.	Dec.	Unch.	Total
NSE	562	711	106	1379
BSE	1325	1592	127	3044

Global Market

Exchange	Level	Change (Pts)	Change (%)
European (Current)			
FTSE	5,282.63	-31.32	-0.59%
CAC	3,625.01	-26.9	-0.74%
DAX	6,086.83	-47.87	-0.78%
US (Future)			
DJIA	10,369.00	-40.00	-0.38%
S&P 500	1,091.60	-5.40	-0.49%
NASDAQ	1,848.75	-8.50	-0.45%
Asian			
Shanghai	2,637.50	-10.61	-0.40%
Nikkei	9,537.30	-158.72	-1.64%
HangSeng	21,029.81	-64.01	-0.30%

Sectoral Indices (BSE)

Index	Current Value	Change (%)
AUTO	8,424.20	-0.12
BANKEX	11,539.55	-0.14
CD	5,294.49	-0.15
OIL&GAS	10,166.13	-0.21
HC	5,597.19	-0.26
PSU	9,576.60	-0.38
METAL	15,399.81	-0.6
FMCG	3,229.86	-0.76
POWER	3,110.24	-0.89
IT	5,474.84	-1.13
CG	14,591.67	-1.14
TECK	3,400.59	-1.22
REALTY	3,372.93	-1.4

Forex Market (Current)

Currency	Today	Change (points)
USD/INR	46.67	-0.12
EURO/INR	60.66	-0.51
GBP/INR	72.64	-0.45
JPY/INR	53.94	0.21

Economic Indicators

	YoY (In %)	Latest
Inflation		10.16%
IIP		13.50%
GDP		6.00%
CRR		6.00%



Market Wrap-up

The key benchmark indices extended initial losses to hit fresh intraday low in late trade as global stocks fell. Realty, FMCG, capital goods and IT stocks fell. Index heavyweight Reliance Industries (RIL) gave up initial gains. The market breadth turned negative in contrast a strong breadth earlier in the day. The 30-share BSE Sensex closed at 17,868.29, down 123.71 points or 0.69% and the 50-share NSE Nifty fell 41.30 points or 0.76% to settle at 5,367.60.

Today's Block Deals

Company	Quantity	Price	Value(Cr)
Sterling Holida	900000	80	7.2
Reliance	57425	1,008.95	5.79
Interworld Digi	550000	2.35	0.13
Tata Motors	65025	857	5.57
Aster Silicates	200419	252.9	5.07
HCL Tech	185150	382.1	7.07
SBI	25148	2,485.20	6.25
Kaashyap Tech	500000	0.68	0.03
Tata Global Bev	921000	117.25	10.8
Tata Global Bev	578000	117.25	6.78
Kotak Mahindra	70022	770.5	5.4
HDFC Bank	50000	2,100.00	10.5
Central Bank	500000	163	8.15
Pantaloon Ret	200000	466	9.32
P and G	62015	2,200.00	13.64
Grasim	40000	1,865.00	7.46
Pantaloon Ret	380000	466	17.71
Union Bank	1500000	318	47.7
Pantaloon Ret	147129	466	6.86
Hero Honda	167000	1,819.50	30.39
FCS Software	525000	2.75	0.14
Ipca Labs	225466	264	5.95
Jain Irrigation	60000	1,233.25	7.4
Redington	259985	396	10.3
Redington	150000	396	5.94
GlaxoSmithKline	45810	2,000.00	9.16
Piramal Health	147500	485	7.15
ONGC	100000	1,233.50	12.34
Sintex India	300000	375	11.25
Cals Refineries	1000000	0.33	0.03
Container Corp	80000	1,382.00	11.06
ITC	406660	309.85	12.6
Aegis Logistics	237208	470	11.15
Shoppers Stop	107302	640	6.87
Pantaloon Ret	173178	462.65	8.01
Shoppers Stop	100000	640	6.4



Corporate News

Hero Honda skids as Q1 net profit declines Hero Honda Motors lost 3.61% to Rs 1,803 as net profit declined 1.6% to Rs 491.69 crore on 12% growth in turnover to Rs 4296.61 crore in Q1 June 2010 over Q1 June 2009.

ONGC runs out of fuel as Q1 net profit declines ONGC fell 1.07% to Rs 1,229.25 after net profit declined 24.48% to Rs 3661.14 crore on 8.16% decline in net sales to Rs 13665.60 crore in Q1 June 2010 over Q1 June 2009.

Siemens trips after weak Q3 numbers Siemens lost 3.35% to Rs 697 after net profit slumped 53.7% to Rs 156.12 crore on 17% rise in net sales to Rs 2234.94 crore in Q3 June 2010 over Q3 June 2009.

Stock-split plan powers Kalpataru Power Kalpataru Power Transmission gained 1.86% to Rs 1,015.15 after the board of directors of the company approved a 5-for-1 stock-split.

Inox Leisure soars on buzz ADAG firm may buy majority stake Inox Leisure surged 18.97% to Rs 85.60 on reports Anil Ambani-controlled Reliance MediaWorks has offered to buy a majority stake in the company for Rs 120 a share.

Adhunik Metaliks shines as PE firm vies for stake in power unit Adhunik Metaliks rose 2.52% to Rs 116.05 on reports SBI Macquarie Infrastructure Fund is buying a 12% in the company's power unit, Adhunik Power and Natural Resources, for Rs 125 crore.

Central Bank of India capitalizes on good quarterly earnings Central Bank of India jumped 7.43% to Rs 162.70 after net profit rose 26.2% to Rs 336.81 crore on 14.5% increase in total income to Rs 3657.97 crore in Q1 June 2010 over Q1 June 2009.

Lanco Infratech jumps on order win Lanco Infratech rose 3.79% to Rs 67.05 after the company won a contract from Maharashtra State Power Generation Company to set up three units of a 1,980 megawatt thermal power project in Maharashtra.

Hitachi Home extends losses after poor Q1 results Hitachi Home & Life Solutions (India) fell 2.52% to Rs 307.45 after net profit declined 22.2% to Rs 14.52 crore on 33.9% increase in net sales to Rs 281.55 crore in Q1 June 2010 over Q1 June 2009.

KEC International gains on buzz it may bid for US firm KEC International rose 1% to Rs 521 on reports the company is bidding for US-based SAE Towers.

Lloyds Metals & Engineers slides as Q1 net loss widens Lloyds Metals & Engineers declined 2.99% to Rs after the company reported higher net loss of Rs 8.30 crore for Q1 June 2010 compared to net loss of Rs 1.28 crore in Q1 June 2009.

ABB drops after poor Q2 results ABB lost 3.90% to Rs 813.50 after net profit slumped 54.1% to Rs 38.30 crore on 3.88% fall in net sales to Rs 1446.60 crore in Q2 June 2010 over Q2 June 2009.

Indian Hotels slides as first quarter net profit falls Indian Hotels Company declined 1.83% to Rs 99 after net profit tumbled 79.74% to Rs 3.33 crore on 25.30% rise in net sales to Rs 328.74 crore in Q1 June 2010 over Q1 June 2009.

Aditya Birla Nuvo strengthens on turnaround results Aditya Birla Nuvo gained 2.08% to Rs 791.20 after the company reported consolidated net profit of Rs 149 crore for Q1 June 2010 compared to net loss of Rs 35.29 crore in Q1 June 2009.



Economic News

Global VC investment in India doubles to USD 182 mn in Apr-Jun Investments by global venture capitalists in India doubled to USD 182 million (about Rs 846.6 crore) in the second quarter this year, compared to the year-ago period, with the services industry attracting the lion's share of the funds. According to Dow Jones VentureSource, a VC industry tracking firm, investments grew in almost every venture hub globally in the April-June quarter, a sign of recovery in the global economy.

India min says premature to raise iron ore export tax India's junior finance minister S.S. Palanimanickam said in a written reply in parliament on Friday that it would be premature to raise tax on iron ore exports. India's steel industry has frequently lobbied for a ban on iron ore export or at least for further raising the export duty on it so that more of the commodity is available for local use at low prices. India last raised the export duty on iron ore lumps in April to 15 percent from 10 percent. Last December, it slapped a 5-percent export duty on iron ore fines.

June fuel sales up on higher auto fuel demand India's annual domestic oil product sales rose 1.8 percent in June, its highest jump since October, to 12 million tonnes on higher demand for auto fuels, government data showed on Friday. Auto fuel sales, including gasoline and diesel, rose as dealers stocked the fuel in anticipation of a hike in prices.

International News

European shares declined on Friday, 30 July 2010, on concerns over US economic growth and downbeat comments from a Federal Reserve official. The key benchmark indices in UK, France and Germany were down by 0.61% to 0.87%.

Asian stocks fell on Friday, 30 July 2010, as higher-than-estimated unemployment in Japan and a poorer Macquarie Group earnings outlook overshadowed increased profit targets at Sony Corp. and Panasonic Corp. The key benchmark indices in China, Indonesia, Hong Kong, Singapore, Taiwan and South Korea were down by between 0.30% to 0.89%.

Japan's Nikkei Average fell 1.64% after the bureau reported the country's unemployment rate rose to a seven-month high of 5.3% in June from 5.2% a month earlier. In other economic news, Japanese factory output marked its biggest fall in more than a year in June and core consumer prices posted their 16th straight month of annual decline in June. The industrial output unexpectedly fell 1.5% in June, surprising markets that expected a 0.2% increase.



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