



Market Indicators

TOP GAINER	%	TOP LOSER	%
BHARTIARTL	3.83	ASIANPAINT	(3.04)
RELINFRA	3.26	SESAGOA	(2.67)
BHEL	2.64	RANBAXY	(2.19)
AMBUJACEM	2.19	AXISBANK	(2.14)
CIPLA	2.11	PNB	(1.96)

Broder Indices

Index	Closing Value	Change in (Pts)	Change (%)
MID CAP	6133.17	(11.19)	(0.18)
SMALL CAP	5906.74	(7.65)	(0.13)
IPO	1523.97	(21.59)	(1.40)

Sectoral Indices

AUTO	9775.72	33.92	0.35
BANKEX	12642.35	(100.44)	(0.79)
CD	7021.49	81.86	1.18
CG	8836.85	(77.79)	(0.87)
FMCG	5767.60	43.82	0.77
HC	8266.74	58.18	0.71
IT	6664.93	(65.97)	(0.98)
METAL	8466.73	(51.81)	(0.61)
OIL & GAS	8463.28	46.50	0.55
POWER	1657.74	10.62	0.64
PSU	6502.11	(7.31)	(0.11)
REALTY	1772.15	1.95	0.11
TECK	3784.82	(13.77)	(0.36)

Currency Movement

USDINR	54.72	0.16↓
EURINR	71.05	0.15↑
GBPINR	83.88	0.34↑
JPYINR	55.51	1.50↓

Market Breadth

Exchange	Advances	Declines	Unchanged
BSE	799	906	626
NSE	547	735	77

MARKET STATISTICS

ACTION	FII (₹) Cr.	DII (₹) Cr.
CASH BUY	1546.88	777.09
CASH SELL	1710.83	564.37
(Provisional)	(163.95)	+212.72

FII Derivatives	Buy (Cr.)	(Sell Cr.)	Net (Cr.)
Index Futures	783.16	1108.08	(324.92)
Index Options	8020.81	7828.73	192.08
Stock Futures	1112.38	1030.14	82.24
Stock Options	942.29	905.73	36.56
Total			(14.04)

*Source: BSE, NSE, BI, Capital Market & rbi.org.in

Exhibit 1: Daily Nifty Chart



NIFTY OUTLOOK

Yesterday Nifty ended marginally negative in a lackluster session and extending losing streak to fourth consecutive session. After a flat opening the indices traded in narrow range 25 points range for the entire session and close at 5542.95 levels with marginal loss of 10.30 points.

- ◆ The price action has resulted in an inside day pattern as indices traded within the previous session's high low range indicates indecisiveness at current levels.
- ◆ The Nifty has closed below its 200 DMA (5643) for a third consecutive session after breaking the same with a bearish gap (5644-5672) in last Thursday's trade. The falling gap area between 5644 and 5672 is an immediate technical resistance and short-term trend will remain down as long as this bearish gap remains unfilled.
- ◆ On a medium term perspective The 5530 - 5450 area is seen as a crucial support for Nifty being confluence of the rising gap area created in mind Sept. 2012 is placed between 5526 - 5447 levels. The 50% retracement of the entire rally from June 2012 low of 4770 to January 2013 high 6112 placed at 5445 levels. At around 5500, the current down move from 5971 would achieve price parity with the first down leg from January highs (6111-5663).
- ◆ The Nifty has given a break down from a Head & Shoulders formation on the Weekly Chart. On the arithmetical scale the pattern target is placed around 5280 - 5250 range, which confluence with the 61.8% retracement level from entire rise from the June month low to January 2013 high (4770 - 6112).
- ◆ For any Pullback attempts from current levels are likely to see the index face a stiff resistance around the bearish gap area of last Thursday (5644-5672). The immediate support for the Nifty is placed in range of 5535 - 5506, below which steep downside can be expected in support from Bollinger band in daily chart exist at 5482 which coincides with the 38.2% retracement level of the entire rise noticed from December 2012 onward.

For today trend deciding level for Nifty placed at 5550 if Nifty trade above this level then it may go up to 5580 - 5610 - 5622 level. However if Nifty trade below 5550 then it may find immediate support at 5522 level any violation of such support would signal further decline up to 5500 - 5482 level.

Indian Index Movement

MOVEMENT	SENSEX	NIFTY	SMA	SENSEX	NIFTY
OPEN	18455.80	5550.50	5 Days	18648	5618
HIGH	18504.48	5569.20	20 Days	19015	5739
LOW	18402.93	5537.05	60 Days	19411	5869
CLOSE	18437.78	5542.95	100 Days	19330	5858
CHANGE IN PTS	(12.45)	(10.30)	200 Days	18613	5643
CHANGE IN %	(0.07)	(0.19)	260 Days	18194	5517

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Symbol	PIVOT TABLE			Simple Moving Average				
	S2	S1	Pivot Point	R1	R2	5 Days	20 Days	55 Days
Sensex	18347	18392	18448	18494	18550	18648	19015	19370
Nifty	5518	5530	5550	5562	5582	5618	5739	5856
Bank Nifty Future	10964	11017	11114	11167	11264	11269	11546	1885
Nifty future	5557	5568	5585	5596	5613	5640	5755	5869
NIFTY COMPONENTS								
ACC	1111	1119	1127	1135	1143	1147	1189	1259
AMBUJACEM	162	165	167	170	172	170	178	189
ASIANPAINT	4497	4560	4674	4737	4851	4791	4862	4616
AXISBANK	1173	1188	1213	1228	1253	1251	1313	1386
BAJAJ-AUTO	1657	1681	1704	1729	1752	1705	1817	1946
BANKBARODA	631	637	646	653	662	665	691	751
BHARTIARTL	264	272	278	287	293	279	297	317
BHEL	173	178	181	186	189	181	188	202
BPCL	371	376	379	384	387	376	383	395
CAIRN	278	282	286	290	294	290	289	305
CIPLA	383	389	393	399	403	389	386	388
COALINDIA	305	307	309	311	314	308	308	327
DLF	229	231	234	236	239	240	255	262
DRREDDY	1853	1895	1922	1964	1991	1883	1818	1846
GAIL	313	317	319	323	325	317	323	336
GRASIM	2680	2707	2729	2756	2778	2751	2883	2970
HCLTECH	725	735	751	761	777	764	777	730
HDFC	742	750	765	773	787	790	806	802
HDFCBANK	613	618	624	630	635	623	629	644
HERMOTOCO	1450	1465	1481	1497	1513	1489	1606	1683
HINDALCO	89	90	90	91	92	91	93	104
HINDUNILVR	468	473	476	481	484	471	461	462
ICICIBANK	976	983	994	1000	1012	1015	1051	1104
IDFC	138	139	141	142	144	143	147	156
INDUSINDB	383	388	398	403	412	409	414	423
INFY	2798	2815	2844	2861	2891	2903	2891	2852
ITC	283	288	291	296	299	300	303	300
JINDALSTEL	324	327	332	336	340	338	349	377
JPASSOCIAT	63	64	65	66	67	66	70	74
KOTAKBANK	614	622	631	639	648	641	648	658
LT	1303	1314	1331	1342	1359	1368	1428	1465
LUPIN	608	614	619	624	630	628	619	604
M&M	828	834	841	848	855	846	879	885
MARUTI	1366	1393	1408	1436	1451	1350	1352	1459
NMDC	1222	123	124	125	127	129	137	145
NTPC	139	140	141	142	143	143	144	150
ONGC	307	310	314	317	321	313	312	320
PNB	689	697	711	720	734	722	753	817
POWERGRID	102	103	105	106	107	105	106	109
RANBAXY	431	436	442	447	454	448	436	432
RELIANCE	771	780	787	797	804	782	812	848
RELINFRA	325	333	339	347	353	339	372	447
SBIN	2002	2018	2045	2061	2087	2081	2138	2245
SESAGOA	141	144	148	150	154	151	157	166
SUNPHARMA	837	851	863	877	889	860	836	788
TATAMOTORS	249	253	257	261	265	259	279	292
TATAPOWER	94	95	96	98	99	96	97	99
TATASTEEL	300	303	308	311	316	311	331	363
TCS	1461	1471	1485	1495	1509	1520	1550	1466
ULTRACEMCO	1737	1763	1781	1807	1824	1803	1862	1894

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Economic Calendar

Impact	IST	Location	Indicator	Unit	Forecast	Previous	Actual
High	7:00	China	CPI (Y o Y)	%	2.5	3.2	
Medium	7:00	China	PPI (Y o Y)	%	-1.8	-1.6	
Low	9th-13th	China	New Loans	B	890	620	
Low	9th-13th	China	M2 Money Supply (Y o Y)	%	14.8	15.2	
Low	11:30	Euro Zone	German Trade Balance	B	16.2	15.7	
Low	12:15	Euro Zone	French Gov Budget Balance			-12.8	
Low	12:15	Euro Zone	French Trade Balance	B	-5.3	-5.9	
High	14:00	Britain	Manufacturing Production (M o M)	%	0.4	-1.5	
Medium	14:00	Britain	Trade Balance	B	-8.5	-8.2	
Low	14:00	Britain	Industrial Production (M o M)		0.4	-1.2	
Low	NA	Britain	10-y Bond Auction			2.15 2.3	
Medium	17:00	USA	NFIB Small Business Index		92.3	90.8	
Low	19:30	Britain	NIESR GDP Estimate	%		-0.1	



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