



Market Indicators

| TOP GAINER | % | TOP LOSER | % |
|------------|------|------------|--------|
| BHARTIARTL | 2.88 | RELINFRA | (6.10) |
| HINDUNILVR | 2.47 | SIEMENS | (4.93) |
| HDFC | 2.23 | GAIL | (3.20) |
| RANBAXY | 2.20 | RELIANCE | (3.20) |
| TATAMOTORS | 1.87 | HEROMOTOCO | (2.83) |

Broder Indices

| Index | Closing Value | Change in (Pts) | Change (%) |
|-----------|---------------|-----------------|------------|
| MID CAP | 6053.50 | (6.65) | (0.11) |
| SMALL CAP | 5729.03 | 2.12 | 0.04 |
| IPO | 1502.84 | 6.11 | 0.41 |

Sectoral Indices

| | | | |
|-----------|----------|----------|--------|
| AUTO | 10071.09 | 34.83 | 0.35 |
| BANKEK | 12820.89 | 38.98 | 0.30 |
| CD | 6963.21 | 108.93 | 1.59 |
| CG | 8825.86 | (166.14) | (1.85) |
| FMCG | 5895.15 | 65.91 | 1.13 |
| HC | 7940.16 | 6.81 | 0.09 |
| IT | 6807.80 | 30.35 | 0.45 |
| METAL | 8528.70 | (35.31) | (0.41) |
| OIL & GAS | 8289.26 | (173.92) | (2.06) |
| POWER | 1629.60 | (17.24) | (1.05) |
| PSU | 6369.14 | (20.78) | (0.33) |
| REALTY | 1760.53 | (34.99) | (1.95) |
| TECK | 3861.25 | 25.19 | 0.66 |

Currency Movement

| | | |
|--------|-------|-------|
| USDINR | 54.27 | 0.17↑ |
| EURINR | 69.88 | 0.61↓ |
| GBPINR | 82.49 | 0.02↑ |
| JPYINR | 57.63 | 0.49↑ |

Market Breadth

| Exchange | Advances | Declines | Unchanged |
|----------|----------|----------|-----------|
| BSE | 1290 | 1459 | 136 |
| NSE | 656 | 832 | 93 |

MARKET STATISTICS

| ACTION | FII (₹) Cr. | DII (₹) Cr. |
|---------------|-------------|-------------|
| CASH BUY | 2898.54 | 928.57 |
| CASH SELL | 2360.27 | 1052.78 |
| (Provisional) | +538.27 | (124.21) |

| FII Derivatives | Buy (Cr.) | (Sell Cr.) | Net (Cr.) |
|-----------------|-----------|------------|-----------|
| Index Futures | 5004.05 | 5389.14 | (385.09) |
| Index Options | 20059.59 | 21361.58 | (1301.99) |
| Stock Futures | 8065.60 | 7829.20 | 236.40 |
| Stock Options | 1432.32 | 1380.15 | 52.17 |
| Total | | | (1398.52) |

Exhibit 1: Daily Nifty Chart



NIFTY OUTLOOK

After a subdued start, the Nifty managed to hold the opening lows and traded choppy in a narrow of just 20 points while hovering precariously above the 200 DMA currently placed at 5624 levels. The Nifty snapped seven sessions losing streak and closed marginal gain of 7 points at 5641.60 levels.

- ◆ The demand line which is connecting tow significant low of 5823 & 5663 which are near term low of December 18, 2012 and March 3, 2013. which coincide the 200 days SMA 56224. A sustained breach of the long term moving average on a closing basis would lead to capitulation and accentuate declines towards the 5500 region. The price action formed a Thrusting line candle, which opened lower and later recovered to close within the previous session's real body. It shows intent to hold the 200 DMA support. However, strength and close above the candle's high (5655) along with a noticeable improvement in the market breadth would be required to generate a positive follow through, failing which the action will remain choppy on the back of derivatives expiry
- ◆ A pullback attempt will see the index face stiff resistance around 5750 - 5800 area being the 38.2% and 50% retracement of the current down move of 5970 - 5631.
- ◆ On the downside, we expect the index to head towards the 5550 - 5500 region before any meaningful recovery takes place. The November 2012 low at 5548 and the upper band of the major rising gap area (5526-5447) formed in mid-September 2012 at 5526 make the 5550-5500 region a crucial support to watch out in the short term

For today trend deciding level for Nifty placed at 5636 if Nifty trade above this level then it may go up to 5655 - 5689 - 5720 level. However if Nifty trade below 5636 then it may find immediate support at 5610 level any violation of such support would signal further decline up to 5574- 5550 level.

| Indian Index Movement | | Important Level | | | |
|-----------------------|----------|-----------------|----------|--------|-------|
| MOVEMENT | SENSEX | NIFTY | SMA | SENSEX | NIFTY |
| OPEN | 18645.09 | 5613.75 | 5 Days | 18760 | 5656 |
| HIGH | 18758.88 | 5655.30 | 20 Days | 19149 | 5784 |
| LOW | 18612.37 | 5612.05 | 48 Days | 19467 | 5888 |
| CLOSE | 18704.53 | 5641.60 | 100 Days | 19336 | 5864 |
| CHANGE IN PTS | +23.11 | +7.75 | 120 Days | 19230 | 5833 |
| CHANGE IN % | 0.12 | 0.14 | 200 Days | 18547 | 5624 |

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



| Symbol | PIVOT TABLE | | | Simple Moving Average | | | | |
|-------------------------|-------------|-------|-------------|-----------------------|-------|--------|---------|---------|
| | S2 | S1 | Pivot Point | R1 | R2 | 5 Days | 20 Days | 55 Days |
| Sensex | 18545 | 18625 | 18692 | 18771 | 18838 | 18760 | 19149 | 19510 |
| Nifty | 5593 | 5617 | 5636 | 5661 | 5680 | 5656 | 5784 | 5902 |
| BankNifty Future | 11007 | 11083 | 11141 | 11217 | 11275 | 11217 | 11708 | 12234 |
| Nifty future | 5600 | 5620 | 5640 | 5660 | 5679 | 5667 | 5799 | 5916 |
| NIFTY COMPONENTS | | | | | | | | |
| ACC | 1132 | 1146 | 1157 | 1171 | 1182 | 1142 | 1208 | 1263 |
| AMBUJACEM | 161 | 165 | 170 | 174 | 178 | 172 | 185 | 192 |
| ASIANPAINT | 4850 | 4877 | 4902 | 4928 | 4953 | 4928 | 4711 | 4552 |
| AXISBANK | 1278 | 1286 | 1295 | 1304 | 1313 | 1303 | 1354 | 1401 |
| BAJAJ-AUTO | 1733 | 1767 | 1789 | 1823 | 1844 | 1804 | 1906 | 1995 |
| BANKBARODA | 644 | 654 | 662 | 672 | 680 | 668 | 708 | 777 |
| BHARTIARTL | 281 | 289 | 293 | 301 | 306 | 292 | 310 | 323 |
| BHEL | 174 | 175 | 178 | 179 | 181 | 180 | 195 | 207 |
| BPCL | 365 | 370 | 373 | 378 | 381 | 372 | 386 | 396 |
| CAIRN | 274 | 276 | 279 | 280 | 283 | 279 | 292 | 312 |
| CIPLA | 372 | 376 | 380 | 384 | 388 | 383 | 382 | 392 |
| COALINDIA | 291 | 296 | 301 | 306 | 310 | 298 | 299 | 317 |
| DLF | 228 | 232 | 237 | 241 | 245 | 240 | 264 | 262 |
| DRREDDY | 1736 | 1749 | 1767 | 1781 | 1798 | 1771 | 1789 | 1853 |
| GAIL | 292 | 298 | 306 | 312 | 321 | 315 | 329 | 343 |
| GRASIM | 2758 | 2791 | 2838 | 2871 | 2918 | 2876 | 2961 | 3010 |
| HCLTECH | 763 | 769 | 774 | 780 | 785 | 772 | 764 | 716 |
| HDFC | 795 | 810 | 819 | 833 | 842 | 801 | 796 | 804 |
| HDFCBANK | 597 | 606 | 612 | 620 | 626 | 612 | 632 | 650 |
| HEROMOTOCO | 1533 | 1552 | 1586 | 1606 | 1640 | 1625 | 1662 | 1726 |
| HINDALCO | 86 | 87 | 88 | 89 | 90 | 89 | 96 | 109 |
| HINDUNILVR | 457 | 465 | 470 | 478 | 484 | 465 | 452 | 466 |
| ICICIBANK | 992 | 1006 | 1017 | 1031 | 1042 | 1020 | 1070 | 1123 |
| IDFC | 136 | 138 | 139 | 141 | 143 | 140 | 150 | 160 |
| INFY | 2817 | 2836 | 2853 | 2871 | 2888 | 2862 | 2900 | 2819 |
| ITC | 299 | 303 | 305 | 309 | 311 | 305 | 299 | 297 |
| JINDALSTEL | 342 | 347 | 351 | 357 | 360 | 347 | 353 | 390 |
| JPASSOCIAT | 62 | 63 | 64 | 65 | 66 | 65 | 72 | 78 |
| KOTAKBANK | 620 | 630 | 636 | 646 | 653 | 635 | 652 | 657 |
| LT | 1308 | 1323 | 1348 | 1363 | 1389 | 1387 | 1439 | 1487 |
| LUPIN | 607 | 614 | 622 | 629 | 638 | 626 | 607 | 599 |
| M&M | 844 | 854 | 863 | 873 | 883 | 871 | 892 | 896 |
| MARUTI | 1254 | 1274 | 1286 | 1305 | 1318 | 1307 | 1381 | 1485 |
| NTPC | 140 | 141 | 142 | 144 | 145 | 140 | 146 | 151 |
| ONGC | 295 | 299 | 303 | 307 | 311 | 299 | 311 | 317 |
| PNB | 694 | 704 | 714 | 723 | 734 | 725 | 781 | 838 |
| POWERGRID | 103 | 104 | 105 | 106 | 106 | 103 | 107 | 110 |
| RANBAXY | 429 | 437 | 443 | 451 | 457 | 438 | 416 | 438 |
| RELIANCE | 764 | 774 | 789 | 799 | 814 | 808 | 828 | 858 |
| RELINFRA | 306 | 315 | 329 | 337 | 351 | 341 | 405 | 474 |
| SBIN | 2008 | 2029 | 2048 | 2070 | 2089 | 2086 | 2157 | 2297 |
| SESAGOA | 148 | 150 | 152 | 153 | 155 | 153 | 159 | 171 |
| SIEMENS | 504 | 516 | 535 | 547 | 566 | 548 | 537 | 590 |
| SUNPHARMA | 810 | 817 | 821 | 828 | 832 | 827 | 820 | 774 |
| TATAMOTORS | 262 | 269 | 273 | 280 | 285 | 275 | 291 | 300 |
| TATAPOWER | 93 | 94 | 95 | 96 | 97 | 96 | 98 | 100 |
| TATASTEEL | 300 | 303 | 308 | 312 | 317 | 321 | 343 | 377 |
| TCS | 1520 | 1538 | 1554 | 1572 | 1588 | 1552 | 1549 | 1438 |
| ULTRACEMCO | 1822 | 1835 | 1850 | 1863 | 1878 | 1854 | 1884 | 1905 |
| WIPRO | 421 | 429 | 435 | 444 | 450 | 434 | 434 | 418 |



Economic Calendar

| Impact | IST | Location | Indicator | Unit | Forecast | Previous | Actual |
|--------|-------|-----------|-------------------------------|------|----------|----------|--------|
| Medium | 12:30 | Euro Zone | German Retail Sales (M o M) | % | -0.5 | 3 | |
| Medium | 14:25 | Euro Zone | German Unemployment Change | K | -2 | -3 | |
| Low | 14:30 | Euro Zone | M3 Money Supply (Y o Y) | % | 3.2 | 3.5 | |
| Low | 14:30 | Euro Zone | Private Loans (Y o Y) | % | -0.7 | -0.9 | |
| Medium | 14:40 | Euro Zone | Retail PMI | | | 44.5 | |
| Low | 15:00 | Britain | BOE Credit Conditions Survey | | | | |
| Low | 15:00 | Britain | Index of Services 3m/3m | % | -0.2 | -0.1 | |
| High | 18:00 | USA | Unemployment Claims | K | 340 | 336 | |
| Medium | 18:00 | USA | Final GDP (Q o Q) | % | 0.5 | 0.1 | |
| Low | 18:00 | USA | Final GDP Price Index (Q o Q) | % | 0.9 | 0.9 | |
| Medium | 19:15 | USA | Chicago PMI | | 56.5 | 56.8 | |
| Low | 20:00 | USA | Natural Gas Storage | BCF | | -62 | |



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Contact Us: research@urjatrade.com

Web: www.LAAVLE.com

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