



**HD HOT SPOTS OF THE DAY**

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**TD**

S&P/ASX 200 closed at 5460.8 down 16

SPI Futures latest at 5452 down 10

Aussie 10 year **bonds** were at 3.81%, 2 points lower yield.

The \$A is at 0.9363us

TOP TWENTY

AMP -7c to \$5.25 on 7.34m shares.

ANZ ex 83c -\$1.08 to \$32.72 on 11.12m shares.

BHP -31c to \$37.34 on 3.66m shares.

BXB steady at \$9.53 on 1.27m shares

CBA +41c to \$79.50 on 1.56m shares.

CSL +16c to \$69.30 on 872,720 shares

FMG -1c to \$4.81 on 16.34m shares

MQG steady at \$60.12 on 1m shares.

NAB +24c to \$34.38 on 5.29m shares.

ORG -15c to \$15.20 on 2.1m shares

QBE +2c to \$11.63 on 2.3m shares.

RIO -51c to \$60.95 on 1.18m shares.

STO +7c to \$14.20 on 2.39m shares

SUN -12c to \$13 on 2.1m shares.

TLS steady at \$5.22 on 9.1m shares.

WBC +4c to \$34.94 on 3.9m shares.

WDC +1c to \$10.87 on 4.18m shares.

WES -7c to \$42.86 on 1.72m shares.

WOW -3c to \$36.84 on 1.4m shares.

WPL +5c to \$41.25 on 895,234 shares

MARKET CLOSES DOWN 16 POINTS, HALVING ITS LOSS ON THE DAY

Our market closed down 16 points to 5460.8 on light volume worth \$3.2 **billion** ahead of the weekend and ahead of our Budget next week. The \$A is at 93.61US c, down about 10 points on last evening.

Over the week the S&P/ASX200 was steady (up 2.7 points for the week!)

Among the Top 20 over the week Macquarie was the winner, up 142c or 2.4% to \$60.12 followed by AMP, up 12c or 2.3% to \$5.25 and Origin, up 32c or 2.2% to \$15.20.

On the downside ANZ (ex div today) fell furthest, down 162c or 4.7% to \$32.72 followed by FMG, down 10c or 2% to \$4.81 and QBE, down 18c or 1.5% to \$11.63.

\*Envestra was the talking point, up 20.5c or 18.14% to \$1.33.5 on 28.9m shares after a counter bid by the Cheung Kong companies are ultimately owned by Mr LiKa-Shing, one of the richest men in the world vs APA's offer. APA up 7c to \$6.91 on 3.9m shares. (APA has 33% of Envestra).

\*Arrium fell 5.5c to \$1.10.5 on 14.9m shares on a slight risk seen to Arrium's non **iron ore** earnings.

\*At the smaller end, Bluechip rose 1.3c to 5.4c on 913,700 shares on its deal in **China**.

\*At 4pm AEST the Nikkei Dow futures was up 80 points to 14,220 points, Shanghai CSI physical was down 5.8 points to 2009.48 points, Hang Seng futures was up 5 points to 21,632 points, S&P futures was down 0.6 points to 1871.70, Nasdaq futures was down 0.5 points to 3537 points, Dow futures was down 12 points to 16,498 points. **Gold** futures was up \$4 to \$1293. Crude futures was up 17c to \$100.43.

(Our thought only: **gold** may receive some support in the Asian day from physical buying by India - marriage season now in full swing).

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