

## TODAYS MARKET OUTLOOK

### Markets to make a soft-to-cautious start on sluggish regional cues

The Indian markets extended their rally mood in the last session and the benchmarks scaled their fresh record highs. Today, the start is likely to be a bit cautious tailing the sluggishness in the regional peers.

Traders will be eyeing the monsoon movement, as the southwest monsoon is most likely to hit the Kerala coast and northeast India simultaneously on Tuesday, the onset date forecast by the India Meteorological Department earlier this month.

Further, Healthcare index (BSE) witnessed a sharp drag, after Sun Pharmaceutical Industries fell as much as 13.2% to a near four-year low after the company on Friday reported a 14% fall in March-quarter profit.

Finally, the BSE Sensex gained 81.07 points or 0.26% to 31109.28, while the CNX Nifty was up by 9.80 points or 0.10% to 9,604.90.

## ECONOMY & MARKET PULSE

- Investments through P-notes decline to 4-month low of Rs 1.68 lakh crore at April-end
- GST rollout to have positive impact on road logistics sector: ICRA
- Poor performance by private investors, banks remains challenge for economy: Arun jaitley
- Classification of goods under different tax slabs of GST worrying traders: CAIT
- India may impose anti-dumping duty on imports of 'O Acid' from China

## Indices Performance

Index	29-May-17	Previous Close	% Change*
S&P BSE Sensex	31,109.28	31,028.21	0.26%
CNX Nifty	9,604.90	9,595.10	0.10%
CNX Midcap	17,225.95	17,586.45	-2.05%
CNX 500	8,299.50	8,331.85	-0.39%
S&P BSE Smallcap	14,855.13	15,086.26	-1.53%

## Global Markets

Index		Previous Close	% Change*
Dow Jones	21,080.28	21,082.95	-0.01%
Nasdaq	6,210.19	6,205.26	0.08%
S&P 500	2,414.50	2,414.50	0.00%
FTSE	7,547.63	7,517.71	0.40%
CAC	5,336.64	5,337.16	-0.01%

## Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	4,493.86	4,809.96	-316.10
DII Flows	3,431.84	3,141.31	290.53

## Commodity Market

Commodities (INR)		Gains+/Loss	% Change*
Gold (10gm)	28,900.00	4.00	0.04%
Silver (1Kg)	40,337.00	311.00	0.61%
Crude Oil (1 barrel)	3,259.00	3.00	1.43%
Aluminium (1 Kg)	125.95	1.05	0.04%
Copper (1Kg)	367.60	3.00	0.05%

## Currency Market

Currency	29-May-17	Gains+/Loss	% Change*
INR / 1 USD	64.5565	0.04	0.06%
INR / 1 GBP	82.8195	0.37	0.44%
INR / 1 EURO	72.1354	0.20	0.27%
INR / 100 JPY	58.0300	-0.08	-0.14%