

## TODAYS MARKET OUTLOOK

### Markets likely to make negative start on feeble global cues

Indian markets fell for a second consecutive session on Friday to join a global sell-off as increased fears of a global trade war dented investor sentiment and spurred demand for safe-haven assets.

Today, the start of the session is likely to be on the negative side tracking weak global cues. Traders will also remain concern on Assocham's report that the escalation of global trade protectionist measures into a full-scale global trade war will damage the Indian economy as well.

Monsoon season delivers about 70 percent of India's annual rainfall and is key to the success of the farm sector, which accounts for about 15 percent of India's \$2 trillion economy but sustains nearly two thirds of the country's 1.3 billion people.

Finally, the BSE Sensex declined 409.73 points or 1.24% to 32,596.54, while the CNX Nifty was down by 116.70 points or 1.15% to 9,998.05.

## ECONOMY & MARKET PULSE

- Govt working on strategy to boost share of services in exports: Suresh Prabhu
- Take immediate steps to streamline cross-border trade operations: PMO to Commerce Ministry
- Note ban succeeded in finding black money, controlling corruption: Jaitley
- CAD likely to widen to \$10-12 billion in Q4FY18 due to higher trade deficit: ICRA

## Indices Performance

Index	25-Mar-18	Previous Close	% Change*
S&P BSE Sensex	32,553.85	32,662.99	-0.33%
CNX Nifty	9,998.05	10,114.75	-1.15%
CNX Midcap	18,474.00	18,747.80	-1.46%
CNX 500	8,800.80	8,904.00	-1.16%
S&P BSE Smallcap	16,807.14	16,956.84	-0.88%

## Global Markets

Index		Previous Close	% Change*
Dow Jones	23,957.89	24,682.31	-2.93%
Nasdaq	7,166.68	7,345.29	-2.43%
S&P 500	2,762.13	2,762.13	0.00%
FTSE	6,952.60	7,039.00	-1.23%
CAC	5,167.21	5,239.74	-1.38%

## Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	5,230.34	5,158.08	72.26
DII Flows	4,202.80	5,138.21	-935.41

## Commodity Market

Commodities (INR)		Gains+Loss	% Change*
Gold (10gm)	30,907.00	4.00	1.36%
Silver (1Kg)	38,874.00	311.00	0.77%
Crude Oil (1 barrel)	4,266.00	3.00	1.55%
Aluminium (1 Kg)	132.40	1.05	-1.01%
Copper (1Kg)	433.40	3.00	-1.26%

## Currency Market

Currency	25-Mar-18	Gains+Loss	% Change*
INR / 1 USD	65.1333	-0.07	-0.11%
INR / 1 GBP	91.9552	0.11	0.12%
INR / 1 EURO	80.3354	0.04	0.04%
INR / 100 JPY	62.1300	-0.69	-1.12%