

TODAYS MARKET OUTLOOK

Markets likely to make cautions start

Indian equity markets ended the Wednesday's trade with cut of over three fourth of a percent, as signs of escalating trade tensions between the US and other world economies dented risk appetite.

Today, the start of the F&O expiry session is likely to be cautious and lots of volatility can be seen with the progress of the trade and as the traders balance their positions to the new series.

Domestic sentiments weakened further with the Reserve Bank of India (RBI) calling for greater vigilance on the domestic macro-economic front saying conditions, which pushed Gross Domestic Product (GDP) growth to 7.7% in March 2018 quarter, are changing and warned that bad loan situation might worsen. Investors also remained concerned with rising crude prices that will trigger inflation and accelerate fiscal deficit.

Finally, the BSE Sensex slipped 272.93 points or 0.77% to 35,217.11, while the CNX Nifty was down by 97.75 points or 0.91% to 10,671.40.

ECONOMY & MARKET PULSE

- Gross NPA of banks likely to surge to 12.2% by March 2019: RBI
- Domestic cement output likely to register 6% growth in FY19: ICRA
- Council to decide on bringing natural gas, ATF under GST ambit: Adhia
- Government debt increases 1.7% to over Rs 76.94 lakh crore in Q4FY18
- Indian economy to grow at 7.5% in FY19: Rajiv Kumar

Indices Performance

Index	27-Jun-18	Previous Close	% Change*
S&P BSE Sensex	35,257.40	35,689.60	-1.21%
CNX Nifty	10,671.40	10,821.85	-1.39%
CNX Midcap	18,182.75	18,595.85	-2.22%
CNX 500	9,129.25	9,296.65	-1.80%
S&P BSE Smallcap	15,968.97	16,539.84	-3.45%

Global Markets

Index		Previous Close	% Change*
Dow Jones	24,283.11	24,657.80	-1.52%
Nasdaq	7,561.63	7,781.52	-2.83%
S&P 500	2,717.07	2,748.80	-1.15%
FTSE	7,537.90	7,627.40	-1.17%
CAC	5,281.29	5,372.31	-1.69%

Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	4,923.45	5,337.07	-413.62
DII Flows	3,572.30	3,487.99	84.31

Commodity Market

Commodities (INR)		Gains+/-Loss	% Change*
Gold (10gm)	30,695.00	1.00	0.46%
Silver (1Kg)	39,642.00	379.00	0.01%
Crude Oil (1 barrel)	5,028.00	27.00	4.42%
Aluminium (1 Kg)	150.35	-0.10	0.03%
Copper (1Kg)	453.75	-6.25	0.41%

Currency Market

Currency	27-Jun-18	Gains+/-Loss	% Change*
INR / 1 USD	68.5246	-0.76	-1.11%
INR / 1 GBP	90.6032	-0.65	-0.72%
INR / 1 EURO	79.8654	-1.01	-1.28%
INR / 100 JPY	62.3600	-0.75	-1.22%