

## TODAYS MARKET OUTLOOK

### Markets to get a soft-to-cautious start of F&O expiry week

The Indian markets gave up some of their gains in final hours of last session but managed to end in green. Today, the start of the F&O expiry week is likely to be flat-to-cautious on sluggish global cues and traders will be concerned over U.S. President Donald Trump's economic growth agenda.

Traders will however be getting some support with the government's plan to table four legislations for the implementation of the goods and services tax in the Lok Sabha today.

Also, the Reserve Bank reported that the country added \$ 14.2 billion in foreign exchange reserves on the balance of payment basis during the first nine months of the outgoing financial year, which is marginally down from \$ 14.6 billion accretion in the year-ago period.

Finally, the BSE Sensex surged 89.24 points or 0.30% to 29421.40, while the CNX Nifty was up by 21.70 points or 0.24% to 9,108.00.

## ECONOMY & MARKET PULSE

- EPFO to discuss over investment increase in ETFs on March 30
- Govt to announce a policy very soon to tackle NPAs: Jaitley
- India's CAD widens to 1.4% of GDP in Q3 of 2016-17
- Govt wants to roll out GST on July 1: Arun Jaitley
- GST will remove barriers between states; make exports more competitive: Sitharaman

## Indices Performance

Index	26-Mar-17	Previous Close	% Change*
S&P BSE Sensex	29,421.40	29,332.16	0.30%
CNX Nifty	9,108.00	9,086.30	0.24%
CNX Midcap	16,936.10	16,893.05	0.25%
CNX 500	7,905.30	7,885.70	0.25%
S&P BSE Smallcap	14,077.61	14,027.94	0.35%

## Global Markets

Index		Previous Close	% Change*
Dow Jones	20,656.58	20,661.30	-0.02%
Nasdaq	5,817.69	5,821.64	-0.07%
S&P 500	2,350.42	2,345.97	0.19%
FTSE	7,340.70	7,324.70	0.22%
CAC	5,032.76	4,994.70	0.76%

## Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	5,976.95	4,880.08	1,096.87
DII Flows	2,903.05	2,786.55	116.50

## Commodity Market

Commodities (INR)		Gains+/Loss	% Change*
Gold (10gm)	28,793.00	4.00	-0.02%
Silver (1Kg)	41,530.00	311.00	0.56%
Crude Oil (1 barrel)	3,142.00	3.00	-0.03%
Aluminium (1 Kg)	126.15	1.05	0.28%
Copper (1Kg)	380.75	3.00	-0.81%

## Currency Market

Currency	26-Mar-17	Gains+/Loss	% Change*
INR / 1 USD	65.4581	-0.04	-0.06%
INR / 1 GBP	81.6721	0.18	0.22%
INR / 1 EURO	70.4656	0.20	0.29%
INR / 100 JPY	58.7400	0.07	0.12%