

## TODAYS MARKET OUTLOOK

### Markets to get a flat-to-positive start of the new week

The Indian markets lost around half a percent in the last session, showing a lackluster performance and markets remaining in red through the session despite a positive opening.

Today, the start is likely to be flat-to-positive. Traders will be eyeing outcome of US President Donald Trump and Prime Minister Narendra Modi meeting, seeking to boost US-Indian relations despite differences over trade, the Paris climate accord and immigration.

Investors failed to get any sense of relief with Reserve Bank Governor Urjit Patel's statement that he is not 'overly pessimistic' about employment scenario in the IT sector, pointing out that mushrooming startups can compensate for job losses.

Finally, the BSE Sensex declined 152.53 points or 0.49% to 31138.21, while the CNX Nifty was down by 55.05 points or 0.57% to 9,574.95.

### ECONOMY & MARKET PULSE

- No hike in power tariffs post GST rollout: Piyush Goyal
- FY18 may continue to pose asset quality pain for banks: ICRA
- GST to lower overall tax burden in long-term: RBI Governor
- Not pessimistic about job scenario in IT sector, start-ups to help create jobs: Patel
- NASSCOM projects Indian IT export growth at slowest pace to 7-8% for FY18

### Indices Performance

Index	26-Jun-17	Previous Close	% Change*
S&P BSE Sensex	31,138.21	31,290.74	-0.49%
CNX Nifty	9,574.95	9,630.00	-0.57%
CNX Midcap	17,686.30	17,907.90	-1.24%
CNX 500	8,355.10	8,423.85	-0.82%
S&P BSE Smallcap	15,381.90	15,609.49	-1.46%

### Global Markets

Index		Previous Close	% Change*
Dow Jones	21,397.29	21,410.03	-0.06%
Nasdaq	6,236.69	6,233.95	0.04%
S&P 500	2,443.32	2,437.40	0.24%
FTSE	7,439.29	7,447.79	-0.11%
CAC	5,281.93	5,274.26	0.15%

### Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	6,638.35	6,129.63	508.72
DII Flows	2,537.14	2,582.92	-45.78

### Commodity Market

Commodities (INR)		Gains+/Loss	% Change*
Gold (10gm)	28,510.00	4.00	-0.78%
Silver (1Kg)	38,304.00	311.00	-0.48%
Crude Oil (1 barrel)	2,801.00	3.00	0.86%
Aluminium (1 Kg)	120.00	1.05	0.00%
Copper (1Kg)	373.30	3.00	-0.13%

### Currency Market

Currency	26-Jun-17	Gains+/Loss	% Change*
INR / 1 USD	64.5365	-0.04	-0.06%
INR / 1 GBP	81.9743	-0.18	-0.21%
INR / 1 EURO	72.0808	-0.01	-0.01%
INR / 100 JPY	58.0100	0.04	0.07%