

## TODAYS MARKET OUTLOOK

### Markets to make flat-to-positive start

Indian equity markets succumbed to selling pressure for the third day running on Tuesday as worries intensified about fallout from a \$1.77 billion fraud at Punjab National Bank and investors waited for the minutes of the latest Federal Reserve meeting for clues on the U.S. rate outlook.

Today, markets is likely to make flat-to-positive start, as traders may go for bargain hunting after three successive days of losses.

Exporters continue to assert that thousands of millions worth of tax refunds are yet to be released by the authorities. Investors also took note that the GST Council, headed by Finance Minister Arun Jaitley, is likely to meet next week to decide on ease of compliance in filing the GST returns.

Since the implementation of the GST on July 1, 2017, traders have been complaining about technical glitches in the GSTN, besides the complex process. Finally, the BSE Sensex shed 71.07 points or 0.21% to 33,703.59, while the CNX Nifty was down by 18 points or 0.17% to 10,360.40.

### ECONOMY & MARKET PULSE

- Govt may impose anti-dumping duty on imports of Chinese chemical
- Govt extends transmission charge waiver period for solar, wind power projects
- Cabinet to soon decide on relief package for telecom sector
- Share of exports in GDP to increase to 40% by 2025: Suresh Prabhu

### Indices Performance

Index	20-Feb-18	Previous Close	% Change*
S&P BSE Sensex	33,703.59	33,774.66	-0.21%
CNX Nifty	10,360.40	10,378.40	-0.17%
CNX Midcap	19,486.70	19,490.65	-0.02%
CNX 500	9,151.05	9,159.95	-0.10%
S&P BSE Smallcap	17,831.04	17,857.08	-0.15%

### Global Markets

Index		Previous Close	% Change*
Dow Jones	25,219.38	25,219.38	0.00%
Nasdaq	7,239.47	7,239.47	0.00%
S&P 500	2,762.13	2,762.13	0.00%
FTSE	7,247.66	7,294.70	-0.64%
CAC	5,256.18	5,281.58	-0.48%

### Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	9,845.98	8,688.69	1,157.29
DII Flows	4,124.06	2,686.82	1,437.24

### Commodity Market

Commodities (INR)		Gains+/Loss	% Change*
Gold (10gm)	30,532.00	4.00	-0.68%
Silver (1Kg)	38,389.00	311.00	-0.43%
Crude Oil (1 barrel)	4,034.00	3.00	-0.07%
Aluminium (1 Kg)	142.05	1.05	-0.53%
Copper (1Kg)	457.20	3.00	-0.02%

### Currency Market

Currency	20-Feb-18	Gains+/Loss	% Change*
INR / 1 USD	64.5254	-0.62	-0.96%
INR / 1 GBP	90.1291	0.18	0.20%
INR / 1 EURO	79.8566	0.31	0.39%
INR / 100 JPY	60.3500	0.11	0.18%