

## TODAYS MARKET OUTLOOK

### Markets to make cautious start of the F&O expiry session

Indian equity markets snapped a three-day losing streak on Wednesday, as PSU banks bounced back from recent heavy losses and IT stocks surged on the back of a weaker rupee. Today, the start of the F&O series expiry session is likely to be slightly in red, tracking weak global leads.

Traders will also remain cautious on report that the country's investment climate during April-December period of this fiscal looks subdued with declining figures in announcements of new projects and the number of projects under execution.

The agency added that the infrastructure sector is showing signs of stability, although pockets of stress still linger. Moreover, the outlook for telecom has been revised to negative-to-stable from negative. The outlooks for thermal power, oil and gas, power, ports and airports remain unchanged.

Finally, the BSE Sensex surged 141.27 points or 0.42% to 33,844.86, while the CNX Nifty was up by 37.05 points or 0.36% to 10,397.45.

## ECONOMY & MARKET PULSE

- Ind-Ra revises infrastructure sector's outlook to stable for FY19
- EPFO may retain 8.65% interest rate on PF deposits for FY18
- RBI's committee to look into NPA divergences, rising incidence of frauds
- Indian IT industry to grow at 7-9% in FY19: NASSCOM

## Indices Performance

Index	21-Feb-18	Previous Close	% Change*
S&P BSE Sensex	33,863.32	33,703.59	0.47%
CNX Nifty	10,397.45	10,360.40	0.36%
CNX Midcap	19,474.80	19,486.70	-0.06%
CNX 500	9,167.60	9,151.05	0.18%
S&P BSE Smallcap	17,793.93	17,831.04	-0.21%

## Global Markets

Index		Previous Close	% Change*
Dow Jones	24,964.75	25,219.38	-1.01%
Nasdaq	7,234.31	7,239.47	-0.07%
S&P 500	2,762.13	2,762.13	0.00%
FTSE	7,246.80	7,247.66	-0.01%
CAC	5,289.86	5,256.18	0.64%

## Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	3,077.55	3,805.81	-728.26
DII Flows	4,218.31	2,842.83	1,375.48

## Commodity Market

Commodities (INR)		Gains+/-Loss	% Change*
Gold (10gm)	30,476.00	4.00	-0.18%
Silver (1Kg)	38,640.00	311.00	0.65%
Crude Oil (1 barrel)	3,999.00	3.00	-0.87%
Aluminium (1 Kg)	142.75	1.05	0.49%
Copper (1Kg)	460.45	3.00	0.71%

## Currency Market

Currency	21-Feb-18	Gains+/-Loss	% Change*
INR / 1 USD	64.8161	-0.29	-0.45%
INR / 1 GBP	90.6583	-0.53	-0.59%
INR / 1 EURO	79.9442	-0.09	-0.11%
INR / 100 JPY	60.1700	0.18	0.30%