

TODAYS MARKET OUTLOOK

Markets to make optimistic start on Monday

Indian equity markets ended higher by around a percent after U.S. government debt yields fell from multiyear highs, helping ease investor worries over inflation and interest rates.

Today, the start of holiday-shortened week is likely to be on optimistic note following firm global cues. Back on domestic turf, the investors will remain watchful for Q4 GDP estimate and manufacturing PMI data to be announced later in the week.

The report added that asset quality has improved, as evidenced by reducing portfolio delinquencies and cumulative collection efficiencies have risen to over 99 percent for disbursements since April 2017. Traders ignored private report that America's bilateral trade deficit with four major countries, including India, narrowed in the first three quarters of 2017 as compared to the previous year.

According to the report, India's growth has slowed due to the effects of its structural economic reforms. Finally, the BSE Sensex surged 322.65 points or 0.95% to 34,142.15, while the CNX Nifty was up by 108.35 points or 1.04% to 10,491.05.

ECONOMY & MARKET PULSE

- Ind-Ra revises steel sector's outlook to stable for FY19
- Micro-finance institutions' asset quality stabilizes: Crisil Ratings
- RBI's new NPA norms likely to push up banks' credit costs, weaken earnings: Fitch Ratings
- India will emerge as model for rest of world on completing transitions: Rajiv Kumar

Indices Performance

Index	25-Feb-18	Previous Close	% Change*
S&P BSE Sensex	34,250.82	33,819.50	1.28%
CNX Nifty	10,491.05	10,382.70	1.04%
CNX Midcap	19,708.40	19,375.10	1.72%
CNX 500	9,251.35	9,138.50	1.23%
S&P BSE Smallcap	18,044.60	17,723.73	1.81%

Global Markets

Index		Previous Close	% Change*
Dow Jones	24,962.48	24,797.78	0.66%
Nasdaq	7,210.09	7,218.23	-0.11%
S&P 500	2,762.13	2,762.13	0.00%
FTSE	7,252.40	7,281.60	-0.40%
CAC	5,309.23	5,302.17	0.13%

Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	7,931.24	10,194.46	-2,263.22
DII Flows	4,240.79	2,726.76	1,514.03

Commodity Market

Commodities (INR)		Gains+/Loss	% Change*
Gold (10gm)	30,509.00	4.00	-0.21%
Silver (1Kg)	38,403.00	311.00	-0.75%
Crude Oil (1 barrel)	4,125.00	3.00	0.95%
Aluminium (1 Kg)	140.15	1.05	-1.41%
Copper (1Kg)	459.70	3.00	-1.07%

Currency Market

Currency	25-Feb-18	Gains+/Loss	% Change*
INR / 1 USD	64.8227	0.22	0.34%
INR / 1 GBP	90.4017	0.01	0.01%
INR / 1 EURO	79.7643	0.07	0.08%
INR / 100 JPY	60.5900	-0.04	-0.07%