

## TODAYS MARKET OUTLOOK

### Markets to make a cautious start

Indian equity markets ended higher on Tuesday, as investors shifted their focus to upcoming corporate earnings and put global trade concerns aside. Today, the markets are likely to make cautious start, following mixed global cues.

Traders will remain concern about a private report that Indian inflation likely rose to a near two-year high in June, driven by surging oil and food prices, a development that would strengthen calls for more monetary policy tightening by the Reserve Bank of India.

Investors also took support from BSE Managing Director and CEO Ashishkumar Chauhan's statement that there was no need to 'panic' over risk management firm Kroll's observations about Indian economy as the country was a thought leader in corporate governance worldwide.

Finally, the BSE Sensex surged 304.90 points or 0.85% to 36,239.62, while the CNX Nifty was up by 94.35 points or 0.87% to 10,947.25.

## ECONOMY & MARKET PULSE

- Private corporate business sector records robust sales growth in Q4 FY18: RBI
- G20 economies impose 39 new trade-restrictive measures in 7 months: WTO
- MoSPI seeks extra budgetary support of Rs 1,200 crore for four key surveys
- Niti Aayog wants states to promote ZBNF for increasing farmers' income
- India Inc's revenue to grow at 12-quarter high of 12.8% in Q1: Crisil

## Indices Performance

Index	10-Jul-18	Previous Close	% Change*
S&P BSE Sensex	36,207.41	36,068.27	0.39%
CNX Nifty	10,947.25	10,852.90	0.87%
CNX Midcap	18,646.20	18,512.95	0.72%
CNX 500	9,359.40	9,277.95	0.88%
S&P BSE Smallcap	16,490.88	16,360.12	0.80%

## Global Markets

Index		Previous Close	% Change*
Dow Jones	24,919.66	24,456.48	1.89%
Nasdaq	7,759.20	7,688.39	0.92%
S&P 500	2,717.07	2,717.07	0.00%
FTSE	7,692.00	7,617.70	0.98%
CAC	5,434.36	5,375.77	1.09%

## Institutional Flows (Equity)

Description (Rs in Cr)	Purchases	Sales	Net
FII Flows	4,489.23	5,231.01	-741.78
DII Flows	3,496.61	3,202.65	293.96

## Commodity Market

Commodities (INR)		Gains+Loss	% Change*
Gold (10gm)	30,528.00	1.00	-0.29%
Silver (1Kg)	39,793.00	379.00	-0.23%
Crude Oil (1 barrel)	5,071.00	27.00	0.44%
Aluminium (1 Kg)	143.25	-0.10	-0.93%
Copper (1Kg)	433.10	-6.25	-0.82%

## Currency Market

Currency	10-Jul-18	Gains+Loss	% Change*
INR / 1 USD	68.6573	0.22	0.32%
INR / 1 GBP	91.4653	-0.32	-0.35%
INR / 1 EURO	80.7822	-0.15	-0.19%
INR / 100 JPY	62.1600	0.09	0.14%