

Indices	CMP	%1D
Sensex	29531	0.41
Nifty	9143	0.47
BSE-Midcap	13930	0.14
BSE-Smallcap	14196	0.31
SGX Nifty Futr	9164	0.22

Sector		
Capital Goods	16196	0.77
Realty	1574	-0.57
Consumer Dur	14892	1.29
Metal	11703	0.71
Oil & Gas	13290	-0.01
Teck	5793	0.39

Index	FY16	FY17E	FY18E
Sensex EPS	1347	1713	2019
P/E	22	17	15
Nifty EPS	407	526	622
P/E	22	17	15

FII Trading activity in cash Rs Cr			
Date 29MARCH	Net	MTD	FYTD
FII	461	26701	25590
DII	1283	-7596	26731

Global Indices	Current Value	%1D
DowJones	20659	-0.2
Nasdaq	5897	0.38
DAX	12203	0.44
Nikkei 225	19217	0.08
FTSE 100	7373	0.41
Hang Seng	24392	0.19
Shanghai A Sha	3241	-0.36
Strait Times	3184	0.84

Forex Rate		
INR/USD	64.86	0.50%
INR/EUR	80.49	0.84%
INR/GBP	69.72	0.78%
INR/YEN(100)	58.36	0.15%

G-Sec Yield		
	Price	Change%
1yr Bond Yield	6.28	0.10
10yr Bond Yield	6.74	0.57

Market Outlook

Indian markets likely to open with a constructive note taking cues from global markets and could remain volatile due to March F&O expiry but it should not turn negative. Hence, investors should stay long as long as Nifty holds 9,075 levels. Tracking the momentum, markets should hold above 8950 level which acts as a major support and resistance is near 9200 in near terms.

Top Domestic News

- Supreme Infra: -Shareholder approve preferential allotment of equity to promoters-Shareholder approve issuance of equity via QIP (qualified institutional placement)
- Thermax -To acquire 100 percent share capital of Barite Investments, Poland -Acquisition part of definitive pact with Weiss, Poland
- Welspun Enterprises -Adani Welspun Exploration awarded contract area B-9 cluster in DSF 2016-Area of cluster is 183 km & is located in Mumbai Offshore basin-Company holds 35 percent stake in Adani Welspun Ex
- Hero MotoCorp -Respect sentiments of the judiciary & government-Have been producing BS-IV roducts since 1-month before deadline -Have reduced BS-III inventory significant in past few months
- Environmental protection will take precedence over temporary financial benefits
- Moody's on Bharti Airtel-Rating unaffected by Bharti Infratel's share sale-See company's profit weak for atleast four quarters
- Shriram Transport Finance approved and allotted non-convertible debentures (NCDs) worth Rs 1,100 crore
- Tayo Rolls board meeting on April 1 to allot non-cumulative redeemable preference shares to promoter
- Reliance Industries completed sale of entire 76 percent stake in Gulf Africa Petroleum Corporation to Total
- Sadbhav Engineering signed EPC agreement with Sadbhav Bangalore Highway for Rs 855 crore Sadbhav Infrastructure signed maintenance contract with Sadbhav Bangalore Highway for Rs 70 crore
- Berger Paints commenced production from Assam plant
- Minda Industries successfully completed QIP of Rs 300 crore at Rs 423 per share
- Deepak Nitrite says closure order of one of the three units at Hyderabad revoked by Telangana State Pollution Control Board
- Alkem Labs gets establishment inspection report from USFDA for Ankleshwar plant
- ICICI Bank in focus: Fairfax needs to sell 25 percent stake in ICICI Lombard to get a new permit

Global News

Wall Street Ends Mixed: It looks like the Wall Street has tempered its expectations for any big bang reforms such as tax cuts from in the US President after healthcare bill failed to impress Congress. The next big trigger for US stocks will be first-quarter earnings which could support lofty valuations for stocks. First-quarter earnings for S&P 500 companies are expected to rise 10.1 percent, according to Thomson Reuters I/B/E/S. The Dow Jones Industrial Average fell 42.18 points, or 0.2 per cent, to 20,659.32, the S&P 500 gained 2.56 points, or 0.11 per cent, to 2,361.13 and the Nasdaq Composite added 22.41 points, or 0.38 per cent, to 5,897.55. Asian shares edged up to near their highest in two years on Thursday, while the dollar benefited from waning expectations that the European Central Bank was poised to end its easy policy. MSCI's broadest index of Asia-Pacific shares outside Japan was 0.2 percent higher in early trade, pushing against its loftiest levels since June 2015.

Top 5 Volume

Script	LTP	Volume
INFRATEL	336	210280982
HATHWAY	38	25805878
SBIN	288	18346222
IDEA	89	12772598
ASHOKLEY	84	11899777

Top 5 Delivery

Script	Trd Qnty	%Delievery
INFRATELL	210280982	99.65
HATHWAY	25805878	98.87
AMRAAGRI	18026521	100
SBIN	18346222	89.52
ASTRAL	14449055	99.87

Top Gainers

Script	LTP	%1D
GRUH	408	9.99
DISHMAN	301	8.38
EDELWEISS	157	7.71
MUTHOOT	377	7.52
COX&KING	221	6.03

Top Losers

Script	LTP	%1D
BHARATFIN	804	-3.65
NLCINDIA	104	-3.55
UNITECH	5	-3.21
HEROMOTO	3223	-3.15
SREINFRA	83	-3.04