

Indices	CMP	%1D
Sensex	33746	-0.88
Nifty	10358	-0.95
BSE-Midcap	16304	-0.95
BSE-Smallcap	17888	-1.09
SGX Nifty	10408	0.47

Sector	CMP	%1D
Capital Goods	18839	-0.99
Realty	2431	-0.71
Consumer Dur	21091	0.26
Metal	14534	-3.30
Oil & Gas	15239	-1.81
Teck	6703	0.08

Index	FY17	FY18E	FY19E
Sensex EPS	1469	1785	1958
P/E	24	20	18
Nifty EPS	466	575	623
P/E	24	19	18

Trading activity in cash Rs Cr			
Date 5 March	Net	MTD	FY18
FII	-366	-124	-86546
DII	-154	-157	108079

Global Indices	Current Value	%1D
DowJones	24499	-0.16
Nasdaq	7208	-0.69
DAX	11988	0.62
Nikkei 225	21042	-0.66
FTSE 100	7081	0.17
Hang Seng	29886	-2.33
Shanghai	3257	0.09
Straits Times	3438	-1.18

Forex Rate		
USD/INR	65.05	-0.25%
EUR/INR	80.03	0.67%
GBP/INR	89.69	-0.01%
JPY/INR	61.64	0.93%

G-Sec Yield		
	Price	Change%
1yr Bond Yield	6.68	-0.03
10yr Bond Yield	7.77	0.41

## Market Outlook

Indian markets are expected to open with a positive note backed by constructive global sentiments but sustainable has no strength. On overall basis direction for the markets are on consolidation. Nifty major supports near 10200- 10300. We advise investors to start accumulating quality counters.

## Top Domestic News

- TRAI Order Prejudicial, Allows Certain Cos To Offer Predatory Pricing, Bars Incumbents. TRAI Tweaked Definition Of Significant Mkt Player, Skewed To Benefit Certain Players.
- JSW Steel Signs MoU To Acquire Italy's Second Largest Steelmaker Aferpi. MoU Between JSW & Aferpi Guarantees Exclusive Talks B/W The Two Players. JSW Steel & Aferpi Deal Pegged At Rs 600 Cr.
- Bank of Baroda keeps 1-Year MCLR unchanged at 8.30% from March 7.
- HDFC approves issue of 1.03cr shares at price of Rs 1825 in QIP.
- Sanghi Industries' meeting on March 7 to approve issue of non-convertible debentures.
- JP Associates - IndusInd Bank has transferred 6 crore shares of Jaypee Infratech held by company which stood pledged in their favour.
- JSW Energy acquires JSW Electric Vehicles Pvt Ltd.
- Bharat Wire Ropes' meeting on March 9 to raise funds via issue of securities through FPO, QIP, private placement, rights issue and other permissible mode.
- Arbitration court bars RCom from selling assets.
- Reliance Infra claims Rs 5,440 cr from Pipavav Def Founders.
- RBI Slaps Rs 3 crore penalty on Axis Bank.
- RBI fines IOB for violation of norms for Rs 20 Millions.
- RBI to infuse Rs 1 trn via special auction.
- HDFC Bank hikes bulk deposits rates upto 175bps.
- Arvind plans apparel parks, textile unit in AP.
- DLF, HDIL - Land prices rise by 40% along proposed Delhi-Jaipur expressway.

## Global News

US stocks ended higher on Monday as fears of a global trade war ebbed with investors betting that U.S. President Donald Trump would back down on his threat to impose hefty tariffs on steel and aluminium imports, said a Reuters report. Asian stocks rallied on Tuesday, tracking gains seen in the US and Europe in the last session as concerns over a potential trade war faded. Japan's Nikkei 225 jumped 2.29 %, or 482.02 points, in the early going, with the dollar extending gains against the yen as trade-related fears abated. The dollar fetched 106.31 yen at 9:29 a.m. HK/SIN after falling as low as 105.34 in the overnight session, CNBC reported.

## NSE Top Gainers

Script	LTP	%1D
TECHM	633.90	3.60
SUNPHARMA	547.35	2.23
TCS	3103.00	2.15
NTPC	165.10	1.29
UPL	721.25	0.98

## NSE Top Losers

Script	LTP	%1D
TATAMOTORS	351.95	-5.07
HINDALCO	228.80	-4.98
AUROPHARMA	599.70	-3.91
TATASTEEL	655.70	-2.87
INFRATEL	335.80	-2.72

## BSE Top Gainers

Script	LTP	%1D
BEML	1361.90	10.45
MINDTREE	859.80	5.96
IDBI	84.40	5.11
VAKRANGEE	162.55	4.97
BLUESTARCO	790.40	4.51

## BSE Top Losers

Script	LTP	%1D
BALRAMCHIN	107.45	-8.63
INOXWIND	127.10	-6.13
NMDC	123.05	-5.85
DEEPAK FERT	316.80	-5.52
JMFINANCIAL	137.20	-5.38

## Technical View

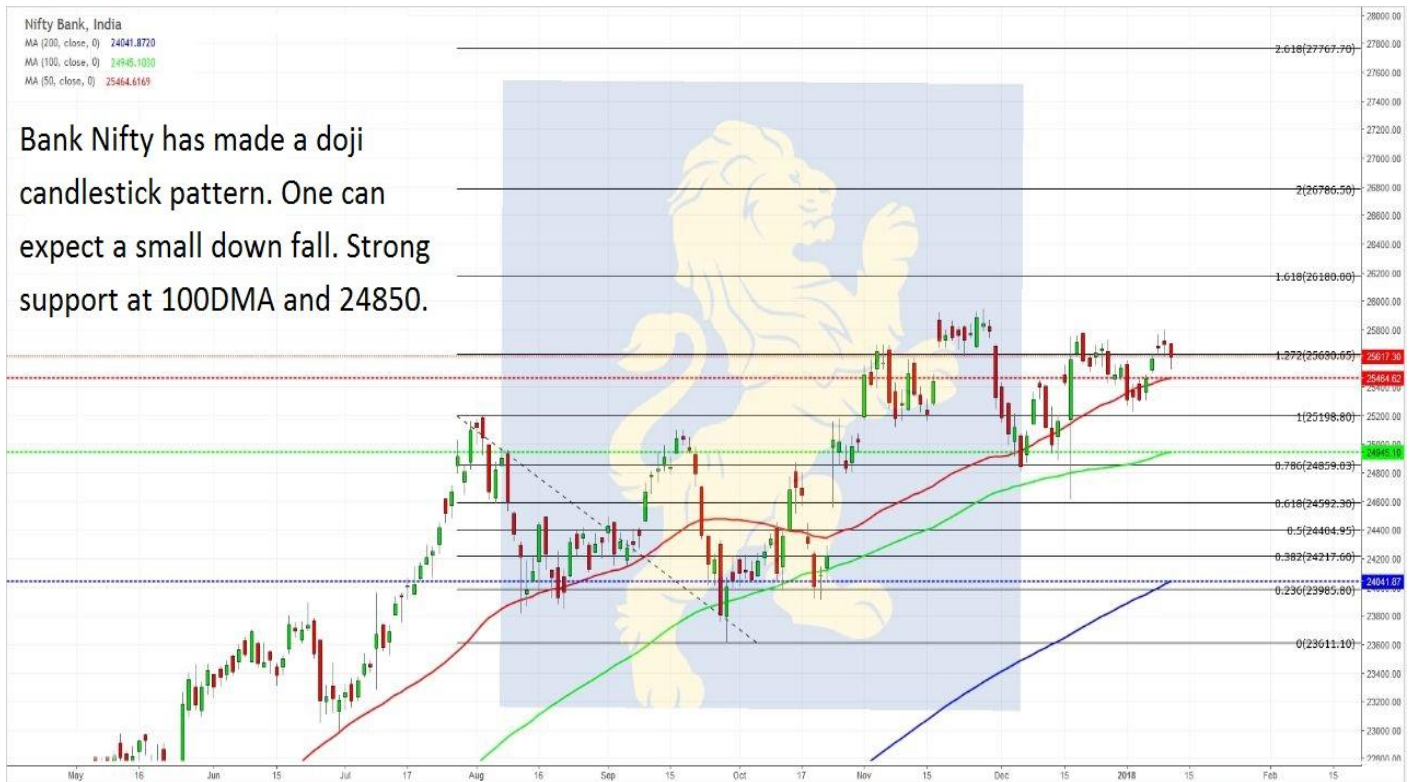
Nifty 50, India  
 MA (200, close, 0) 9866.8793  
 MA (100, close, 0) 10180.2700  
 MA (50, close, 0) 10351.4070

Nifty has achieved DOUBLE BOTTOM patterns target. Nifty made a doji candlestick pattern. It is very important that Nifty closes above 10660 for more bullish upmove.



Nifty Bank, India  
 MA (200, close, 0) 24041.8720  
 MA (100, close, 0) 24945.1030  
 MA (50, close, 0) 25464.6169

Bank Nifty has made a doji candlestick pattern. One can expect a small down fall. Strong support at 100DMA and 24850.



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