

The Morning Post

Thursday, February 27, 2025

As of 08:13 AM in Morning

Global Markets

North American Markets

LTP

Change

Change %

If U.S. indices rise, expect global positivity benefiting Indian IT, Pharma, and large-cap stocks; if Canada's S&P/TSX gains on higher oil, Indian energy and metal stocks may follow, but sharp U.S. market drops signal risk aversion, potentially weakening Indian markets.

▼ Dow Jones (US)	🕒	43433.12	-188.04	-0.43%
▲ Nasdaq Composite (US)	🕒	19075.26	+48.87	+0.26%
▲ S&P 500 (US)	🕒	5956.06	+0.81	+0.01%
▲ S&P/TSX (Canada)	🕒	25328.36	+124.36	+0.49%

Asian-Pacific Markets

LTP

Change

Change %

Asia-Pacific indices, such as Nikkei 225, Shanghai Composite, and S&P/ASX 200 and other indices, provide insights into regional economic health, trade, and industrial demand, where rising indices signal stronger commodity demand benefiting Indian exporters, while declines or weaker demand in China can pressure Indian Metals and Energy sectors.

▲ S&P/ASX (Australia)	🕒	8268.40	+16.50	+0.20%
▼ Nikkei 225 (Japan)	🕒	38114.92	-122.87	-0.32%
▼ KOSPI (Korea)	🕒	2616.36	-13.93	-0.53%
▲ Shanghai Index (China)	🕒	3373.86	+27.82	+0.83%
▲ CSI 1000 (China)	🕒	6501.56	+0.00	+0.00%
▲ Hang Seng (Hong Kong)	🕒	23874.02	+840.00	+3.65%
▼ Straits Times Index (Singapore)	🕒	3897.38	-18.49	-0.47%
▲ Tokyo Price Index (Japan)	🕒	2,725.16	+8.76	+0.32%

European Markets

LTP Change Change %

European indices like FTSE 100, DAX, and CAC 40 reflect the economic health of Europe, where rising indices indicate optimism in global trade and industrial activity, benefiting Indian exporters and large-cap stocks, while declines may signal economic concerns, leading to cautious sentiment in Indian markets.

▲ FTSE 100 (UK)	🕒	8731.46	+62.76	+0.72%
▲ DAX Index (Germany)	🕒	22794.11	+383.84	+1.71%
▲ CAC 40 (France)	🕒	8143.92	+92.85	+1.15%

Major Futures

LTP Change Change %

Major futures, such as Dow Futures, Nasdaq Futures, and Dollar Index Futures, provide a forward-looking view of market trends, where rising futures indicate positive sentiment that can boost Indian equities, while falling futures or a strengthening Dollar Index may signal global risk aversion, potentially pressuring Indian markets.

▼ Dow 30 Futures (US)	🕒	43433.12	-188.04	-0.43%
▲ Nasdaq 100 Futures (US)	🕒	21132.92	+45.67	+0.22%
▲ S&P 500 Futures (US)	🕒	5956.06	+0.81	+0.01%
▲ US Dollar Index Futures (US)	🕒	106.61	+0.30	+0.28%
▼ FTSE 100 Futures (UK)	🕒	8701.5	-19	-0.22%
▼ DAX Futures (Germany)	🕒	22649	-195	-0.85%

ADR

LTP Change Change %

An ADR is American Depositary Receipt a negotiable certificate issued by a U.S. depositary bank that represents shares of a foreign company's stock, It allows U.S. investors to invest in foreign companies without dealing with the complexities of foreign stock exchanges or currencies.

▲ Infosys ADR	🕒	20.77	+0.00	+0.00%
▼ Wipro ADR	🕒	3.37	-0.01	-0.30%
▼ HDFC Bank ADR	🕒	59.97	-0.19	-0.32%
▼ ICICI Bank ADR	🕒	28.07	-0.12	-0.43%
▼ Dr, Reddy's Laboratories ADR	🕒	13.04	-0.07	-0.53%

GDR

LTP Change Change %

A GDR is a certificate issued by a depositary bank that represents shares in a foreign company, but it is traded on international markets outside the company's home country.

GDRs are commonly traded on European stock exchanges such as the London Stock Exchange (LSE) or Luxembourg Stock Exchange.

▲ Reliance Industries GDR	🕒	55.10	+0.00	+0.00%
▼ Axis Bank GDR	🕒	57.8	-0.2	-0.34%
▲ Larsen & Toubro GDR	🕒	36.9	+0.1	+0.27%
▼ State Bank of India GDR	🕒	75	-0.5	-0.93%

Major Commodities and Currencies

Precious Metals

LTP Change Change %

Precious metals like Gold, Silver, and Platinum are often seen as safe-haven investments, where rising prices indicate increased risk aversion and market uncertainty, while declining prices reflect improved investor confidence and support for equity markets.

▲ Gold/USD	🕒	2927.50	+23.00	+0.79%
▲ Silver/USD	🕒	32.18	+0.38	+1.19%
▲ Platinum/USD	🕒	972.80	+12.20	+1.27%
▲ Palladium/USD	🕒	920.50	+0.00	+0.00%

Energy

LTP Change Change %

Energy commodities such as Crude Oil, Brent Oil, and Natural Gas are critical economic indicators, where rising prices benefit energy producers like ONGC but pressure oil marketing companies (OMCs) and inflation-sensitive sectors like FMCG, while falling prices ease inflation and reduce costs for energy importers.

▼ Brent Oil	🕒	72.32	-0.70	-0.96%
▼ Crude Oil WTI	🕒	68.85	-0.08	-0.12%
▼ Natural Gas	🕒	3.86	-0.31	-7.43%

Major Currencies

LTP Change Change %

Major currency pairs, such as USD/INR and EUR/USD, influence global trade and investment, where a stronger USD benefits export-driven sectors like IT and Pharma in India but raises costs for import-dependent industries like Energy and FMCG.

▼ EUR/USD	🕒	1.0477	-0.0047	-0.45%
▲ USD/JPY	🕒	149.2650	+0.1870	+0.13%
▼ GBP/USD	🕒	1.2664	-0.0010	-0.08%
▲ USD/CAD	🕒	1.4347	+0.0046	+0.32%
▼ AUD/USD	🕒	0.6309	-0.0044	-0.69%
▲ USD/CNY	🕒	7.2657	+0.0181	+0.25%
▲ USD/INR	🕒	87.0850	+0.0038	+0.00%

Metals (LME)

LTP Change Change %

Base metals like Copper, Aluminium, and Zinc traded on the London Metal Exchange (LME) reflect industrial demand and global growth, where rising prices signal strong economic activity benefiting Indian metal companies like Tata Steel, while falling prices indicate weaker demand, pressuring the sector.

▼ Aluminium	🕒	2637.24	-5.39	-0.2%
▲ Zinc	🕒	2787.44	+4.66	+0.17%
▲ Lead	🕒	2002.82	+11.36	+0.57%
▲ Nickel	🕒	15432.82	+255.94	+1.69%
▼ Tin	🕒	32404	-390	-1.19%
▲ Copper	🕒	9476.02	+82.35	+0.88%

Indian Markets

Major Indian Indices

LTP

Change

Change %

Just a glimpse of what happened in the indian markets yesterday.

▼ Nifty 50	🕒	22547.55	-5.80	-0.03%
▼ Nifty Bank	🕒	48608.35	-43.60	-0.09%
▲ Sensex	🕒	74602.12	+147.71	+0.20%
▲ India VIX	🕒	13.72	+0.00	+0.00%

Gift Nifty (SGX)

LTP

Change

Change %

Gift Nifty (previously SGX Nifty) tracks the performance of the Nifty 50 index traded in the Gujarat International Finance Tec-City (GIFT City) and serves as an early indicator for Indian markets.

If Gift Nifty rises in premarket trading: It signals positive sentiment and a likely strong opening for the Nifty 50 index.

If Gift Nifty falls: It suggests caution among traders, indicating a weak or volatile start for Indian markets.

Gift Nifty is closely influenced by global market trends, such as movements in U.S. indices (Dow, Nasdaq, and S&P 500) and Asian markets like Nikkei and Shanghai Composite.

The index allows foreign investors to trade in Indian equity futures during non-market hours, making it a key tool for gauging overnight sentiment and its impact on the Indian markets.

▼ Gift Nifty	🕒	22588.5	-32	-0.14%
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Sector Wise

IT Sector		LTP	Change	Change %
<i>The Information Technology (IT) sector is a major driver of the Indian economy, influenced by global demand, technological trends, and the USD/INR exchange rate.</i>				
<i>If the USD strengthens against the INR: IT exporters like Infosys and TCS benefit as they earn more in rupee terms, boosting profitability and market sentiment.</i>				
<i>If global tech indices like the Nasdaq Composite rise: This reflects strong demand for technology services, which positively impacts Indian IT companies.</i>				
<i>If the USD weakens or global tech demand slows: IT companies face revenue pressures, leading to muted stock performance.</i>				
<i>The IT sector is a key indicator of India's export-driven growth and is highly sensitive to global economic conditions.</i>				
▲ Nasdaq Composite	🕒	19075.26	+48.87	+0.26%
▲ Infosys ADR	🕒	20.77	+0.00	+0.00%
▼ Wipro ADR	🕒	3.37	-0.01	-0.30%
▲ USD/INR	🕒	87.08	+0.00	+0.00%

Metal Sector

LTP Change Change %

The metal sector reflects industrial growth and global demand for base metals like Copper, Aluminium, and Zinc.

If global commodity prices rise (e.g., on the LME): It signals strong global industrial demand, benefiting Indian metal companies like Tata Steel and Hindalco.

If Chinese economic data shows strength: Higher Chinese demand boosts global prices, positively impacting Indian metal stocks.

If prices fall due to weaker demand: Companies face margin pressure, and stock performance may decline, especially if the INR strengthens.

The metal sector is highly sensitive to geopolitical events, trade policies, and economic trends, making it a key indicator of industrial activity.

▲ S&P/ASX	🕒	8267.30	+15.40	+0.19%
▲ Shanghai Index (China)	🕒	3374.34	+28.30	+0.85%
▼ AUD/USD	🕒	0.63	-0.00	-0.69%
▼ Aluminium	🕒	2637.24	-5.39	-0.2%
▲ Zinc	🕒	2787.44	+4.66	+0.17%
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Energy Sector

LTP Change Change %

The energy sector is driven by crude oil and natural gas prices, influencing upstream companies like ONGC and downstream oil marketing companies (OMCs) like HPCL.

If crude oil prices rise: Producers like ONGC benefit from higher realizations, while OMCs face margin pressures due to increased input costs.

If crude oil prices fall: It eases inflation, supports margin expansion for OMCs, and benefits industries like FMCG and transportation.

Global factors such as OPEC decisions and geopolitical events significantly impact crude oil prices and the performance of energy stocks.

The energy sector's dynamics affect inflation, input costs, and broader market sentiment.

▲ S&P/TSX	🕒	25328.36	+124.36	+0.49%
▲ USD/CAD	🕒	1.43	+0.00	+0.32%
▼ Brent Oil	🕒	72.32	-0.70	-0.96%
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Banking Sector

LTP Change Change %

The banking sector is highly influenced by macroeconomic factors like bond yields, credit growth, and interest rates, making it a key indicator of economic health.

If bond yields fall (e.g., India 10-Year Government Bond Yield): Banks benefit from lower borrowing costs, improved net interest margins (NIM), and mark-to-market gains on bond portfolios.

If credit growth is strong: Rising loan demand signals economic expansion, driving banking stocks like HDFC Bank and SBI higher.

If bond yields rise or credit growth weakens: Higher yields squeeze margins, reducing profitability, while weak credit demand reflects slowing economic activity.

Global factors like rising U.S. Treasury yields can lead to capital outflows, negatively impacting Indian banking stocks and broader market sentiment.

▼ HDFC Bank ADR	🕒	59.97	-0.19	-0.32%
▼ ICICI Bank ADR	🕒	28.07	-0.12	-0.43%
▼ Axis Bank GDR	🕒	57.8	-0.2	-0.34%
▼ State Bank of India GDR	🕒	75	-0.5	-0.93%
▲ U.S. 10-Year Treasury Yield	🕒	4.28	+0.02	+0.54%
▲ India 10-Year Bond Yield	🕒	6.71	+0.00	+0.03%