

Indian Indices	Mar 30	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	71948	-2.22	-15.03	-7.06	19.78
Nifty 50	22331	-2.14	-13.91	-5.05	19.62
BSE Mid cap	40537	-2.56	-12.80	-2.39	NA
Nifty Midcap	52650	-2.68	-12.12	1.89	32.55
Nifty Smallcap	15204	-2.66	-13.22	-5.54	25.91
BSE SmallCap	43218	-2.73	-15.13	-7.33	NA

Source: BSE, NSE

Indian Indices	Mar 30	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52614	-2.33	-15.04	10.29
BSE Bankex	56581	-3.80	-14.63	-4.97
BSE CD	52619	-2.03	-11.09	-3.24
BSE CG	64243	-2.22	-3.20	2.42
BSE FMCG	16774	-1.88	-16.82	-13.75
BSE Healthcare	41778	-1.53	-3.80	0.86
BSE IT	27926	-1.83	-24.16	-22.69
BSE Metal	36816	-0.06	1.52	19.44
BSE Oil & Gas	25559	-0.37	-8.54	1.69
BSE Power	6672	-1.85	3.75	1.27
BSE Realty	5046	-3.03	-25.22	-23.56

Source: BSE, NSE

Global Indices	Mar 31	1D % Chg	3M % Chg	1Y % Chg
DJIA	46342	2.49	-3.58	11.44
Nasdaq	21591	3.83	-7.11	24.64
FTSE 100	10176	0.48	2.47	17.53
Nikkei 225	51064	-1.58	1.44	37.56
Hang Seng	24788	0.15	-3.29	5.81

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 27	MF Inv Mar 20	DII Inv Mar 30
Buy	22117	18965	26359
Sell	26082	14666	11464
Net	-3965	4299	14895
Net (YTD)	-128857	128255	243556

Source: NSDL, NSE

Debt Market Indicators	Mar 30	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	7.00%	5.50%
10 Yr Gilt^	7.02%	6.94%
91-day T-bill^	5.40%	5.45%
182-day T Bill^	5.51%	5.51%
364-day T Bill^	5.70%	5.65%
3-mth CP rate	7.75%	7.90%
6-mth CP rate	7.65%	7.85%
1-yr CP rate	7.60%	7.62%
3-mth CD rate	7.35%	7.55%
6-mth CD rate	7.30%	7.45%
12-mth CD rate	7.25%	7.25%
5 yr Corp Bond	7.67%	7.67%
Net LAF o/s (Rs Cr)*	-140141	-139827
M3 supply (Rs lakh Cr)**	301.93	302.98
G-sec Volume (Rs Cr)	43245	35990
SDF*	321289	233519
1 Year OIS	6.26%	6.04%
US 10-year Treasury Yield^	4.30%	4.35%

\*Data with 1-day lag (includes fixed and variable repo & reverse repos) ^Weighted average yield

\*\*Mar 15 and Feb 28 respectively ^Data as of Mar 31

## Indian Equity

- Indian equity benchmarks closed lower on Monday, weighed down by renewed geopolitical conflicts that reignited oil-driven inflation fears.
- The top losers were Bajaj Finance, Shriram Finance, State Bank of India, InterGlobe Aviation, and Kotak Mahindra Bank, down 3.59% - 4.95%.
- The top gainers were Hindalco Industries, Tech Mahindra, Coal India, Oil and Natural Gas Corporation and Power Grid Corporation of India, up 0.10% - 2.46%.

## Global Equity

- Wall Street stocks closed higher on Tuesday boosted by speculation of a potential Middle East de-escalation after reports suggested US President may consider halting military action.
- FTSE index closed higher on Tuesday driven by sector specific gains despite surge in oil prices and economic concerns.
- Strait Times Index ended lower on Tuesday amid renewed US threats against Iran and its energy assets.
- Nikkei Index ended lower on Tuesday due to ongoing Middle East tensions.
- Hang Seng Index ended flat on Tuesday as sector specific gains were offset due to Middle East uncertainties.
- At 8.30 AM, Asian Markets were mostly trading higher.

## Indian Debt

- The interbank call-money rate ended higher at 7.00% on Monday compared to 5.50% on Friday.
- Government bond prices ended lower on Monday as soaring oil prices, war-driven uncertainty and weak demand overshadowed RBI's bond buying and liquidity support.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.00% on Monday compared to 6.94% on Friday.

## Capital Market

- Realty firms Signature Global (India) Ltd and RMZ group entered an equal joint venture to develop a commercial project in Gurugram, with the latter infusing Rs 1,293 crore for a 50% stake.
- The Indian Institute of Technology (IIT) Bombay and ideaForge Technology forged an agreement to encourage future tech leaders to develop ideas that solve real-world problems while demonstrating strong technical depth and entrepreneurial intent.
- OpenFX raised \$94 million in a funding round led by several venture capital firms, as the company looks to use stablecoins to speed up cross-border payments.
- Whoop raised an additional \$575 million, a new milestone on its way to an initial public offering.
- Bachatt raised \$12 million in a Series A funding round led by Accel, along with participation from Lightspeed, Info Edge Ventures, and existing investors.
- Sathya Agencies filed its draft red herring prospectus (DRHP) with the Securities and Exchange Board of India (Sebi) to raise up to Rs 600 crore through an initial public offering (IPO).

## Regulatory

- The Reserve Bank of India (RBI) plans to introduce account portability, allowing customers to switch banks without changing their account numbers.

## Economy and Government

- Prime Minister Narendra Modi inaugurated Rs 3,300 crore Kaynes Semiconductor Plant at Sanand GIDC in Ahmedabad.
- Prime Minister Narendra Modi said the 21st Century has brought several challenges and global supply chains have been affected due to conflicts, emphasising that the government is laying a strong foundation for technology and energy security in the coming decades.

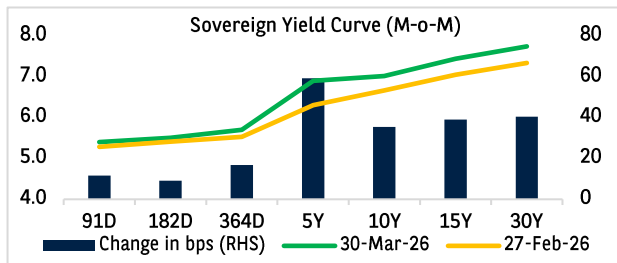
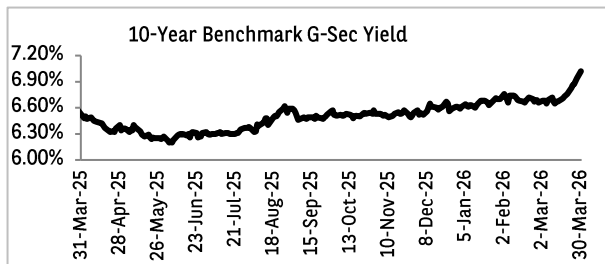
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.51	7.57	8.31	8.36	9.59	10.07
1-Yr	5.82	7.57	8.31	8.36	9.59	10.07
3-Yr	6.43	7.59	8.33	8.38	9.61	10.09
5-Yr	6.90	7.67	8.51	8.56	9.79	10.27
10-Yr	7.02	7.74	8.58	8.63	9.86	10.34

G-sec and corporate bonds data as of Mar 30

\* Weighted average yields; Source: CRISIL



## International

- US House Price Index rose by 1.6% in January 2026 compared to the same month last year, after being revised upward to a 1.9% increase in December 2025.
- US Dallas Fed Services Index plummeted by 10.1 points to -13.3 in March 2026 compared to -3.2 in February 2026.
- Eurozone annual inflation climbed to 2.5% in March 2026, compared to 1.9% in February 2026 while the annual core inflation rate edged down to 2.3%, from 2.4%.
- The British economy expanded 1% year-on-year in the fourth quarter of 2025, compared to a 1.3% rise in Q3 2025.
- UK Nationwide House Price Index rose 2.2% year-on-year in March 2026, compared to 1.0% growth in February 2026.
- China NBS Composite PMI Output Index rose to 50.5 in March 2026 compared to 49.5 in February 2026.
- Japan housing starts fell 4.9% in February 2026, compared to a 0.4% decline in January 2026.
- Japan Construction Orders increased 42.7% in February 2026 compared to 5.7% in January 2026.
- Japan S&P Global Manufacturing PMI edged lower to 51.6 in March 2026 compared to 53.0 in February 2026.

## Commodities

- Crude oil prices fell by \$1.50 to \$101.38 a barrel on the NYMEX as reports hinting at Iran's readiness to negotiate a war-ending deal reduced supply fears.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.21% (Feb'26)	0.71% (Nov'25)	3.61% (Feb'25)
IIP	5.2% (Feb'26)	7.2% (Nov'25)	2.7% (Feb'25)
GDP	7.8% (Oct-Dec FY'26)	8.4% (Jul-Sep FY'26)	7.4% (Oct-Dec FY'25)
GST Collection (in Rs cr)	1,83,609 (Feb-26)	1,93,384 (Nov-25)	1,69,779 (Feb-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Mar 30	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)*	118.35	116.89	60.85	73.63
NYMEX Crude Oil (\$/bbl)*	101.38	102.88	57.42	69.36
Gold (Rs / 10 gm)#	146733	142942	134599	89164

# ibjaraates spot prices

Source: Financial Websites, IBJA \*Data as of Mar 31

Currencies Vs INR	Mar 30	Mar 27
USD	94.65	94.60
GBP	125.63	126.20
Euro	109.01	109.16
100 Yen	59.25	59.26
Forex Reserve (\$ bn)*	698.35	709.76
Dollar Index	99.96	100.51

\*Data pertains to Mar 20 and to Mar 13 respectively

Source: RBI, Financial Websites

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