

Indian Indices	Feb 27	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81287	-1.17	-5.17	8.95	22.32
Nifty 50	25179	-1.25	-3.96	11.68	22.03
BSE Mid cap	45630	-1.04	-3.39	15.68	NA
Nifty Midcap	59116	-1.14	-3.27	20.31	32.89
Nifty Smallcap	16929	-1.10	-5.30	11.69	30.14
BSE SmallCap	48505	-0.89	-6.94	9.96	NA

Source: BSE, NSE

Indian Indices	Feb 27	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	62237	-1.81	1.35	30.51
BSE Bankex	68140	-1.01	1.87	23.02
BSE CD	59193	-0.02	-4.29	9.21
BSE CG	70454	-0.49	1.59	24.71
BSE FMCG	18739	-1.52	-7.96	-0.69
BSE Healthcare	43917	-1.17	-1.80	12.42
BSE IT	29755	0.27	-18.11	-22.23
BSE Metal	40424	-1.57	18.78	42.93
BSE Oil & Gas	29596	-0.02	3.91	27.68
BSE Power	6967	-0.58	4.76	18.12
BSE Realty	6068	-2.25	-13.67	-3.49

Source: BSE, NSE

Global Indices	Feb 27	1D % Chg	3M % Chg	1Y % Chg
DJIA	48978	-1.05	3.27	13.27
Nasdaq	22668	-0.92	-2.35	22.24
FTSE 100	10911	0.59	12.55	24.60
Nikkei 225	58850	0.16	17.31	53.83
Hang Seng	26631	0.95	2.64	12.28

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 26	MF Inv Feb 20	DII Inv Feb 27
Buy	15522	15206	24868
Sell	17951	10754	12575
Net	-2429	4452	12293
Net (YTD)	-11083	37235	100595

Source: NSDL, NSE

Debt Market Indicators	Feb 27	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.12%	4.75%
10 Yr Gilt^	6.66%	6.69%
91-day T-bill^	5.29%	5.31%
182-day T Bill^	5.41%	5.46%
364-day T Bill^	5.53%	5.54%
3-mth CP rate	7.50%	7.44%
6-mth CP rate	7.50%	7.40%
1-yr CP rate	7.25%	7.25%
3-mth CD rate	7.00%	7.00%
6-mth CD rate	7.00%	7.00%
12-mth CD rate	6.85%	6.87%
5 yr Corp Bond	7.24%	7.24%
Net LAF o/s (Rs Cr)*	-219095	-233650
M3 supply (Rs lakh Cr)**	298.55	299.04
G-sec Volume (Rs Cr)	72135	36280
SDF*	345621	360176
1 Year OIS	5.48%	5.50%
US 10-year Treasury Yield	3.97%	4.02%

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

**Jan 31 and Jan 14 respectively

Indian Equity

- Indian equity benchmarks closed lower on Friday, because of profit booking due to rising geopolitical uncertainties surrounding US-Iran talks.
- The top losers were Adani Enterprises, Maruti Suzuki, Bharti Airtel, Grasim and Sun Pharma, down 2.40%-2.68%.
- The top gainers were Trent, Infosys, HCL Technology, Apollo Hospitals and Eternal, up 0.41%-1.35%.

Global Equity

- Wall Street stocks closed lower on Friday, dragged down by losses in financial and technology stocks due to concerns over AI-related costs, renewed tariff uncertainty and geopolitical tensions.
- FTSE index closed higher on Friday, lifted by strong gains in mining and defensive stocks.
- Strait Times Index closed higher on Friday owing to stock-specific gains.
- Nikkei Index closed higher on Friday, buoyed by optimism over government economic support measures.
- Hang Seng Index closed higher on Friday, boosted by gains in technology stocks.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended higher at 5.12% on Friday compared to 4.75% on Thursday.
- Government bond prices ended higher on Friday as surplus banking system liquidity supported demand despite concerns over record borrowing next fiscal year.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.66% on Friday compared to 6.69% on Thursday.

Capital Market

- Blue Jet Healthcare plans to invest Rs 2,300 crore in a major pharmaceutical plant in Andhra Pradesh.
- GAIL India plans a 178.2 Megawatt (Mw) greenfield wind project in Maharashtra, investing Rs 1,736.25 crore via debt and equity.
- HG Infra Engineering received an LoA from the National Highways Authority of India (NHAI) for a Rs 1,582.11 crore HAM road project in Odisha.

Regulatory

- Sebi introduced a new category of mutual fund schemes called life cycle funds, open ended funds with attributes of predetermined maturity and glide path for goal based investing.
- Telecom Regulatory Authority of India (Trai) issued a consultation paper on fine-tuning the ratings framework for buildings based on digital connectivity.

Economy and Government

- Indian real gross domestic product expanded by 7.8% in the third quarter of fiscal 2026, compared to the upwardly revised 8.4% in second quarter of fiscal 2026.
- India fiscal deficit for the first ten months of this fiscal year through January stood at Rs 9.81 lakh crore, or 63% of annual estimates.
- India gross goods and services tax (GST) collection increased 8.1% year-on-year to Rs 1.84 lakh crore in February 2026, driven by steady domestic demand and a surge in import-related revenue.
- The Central Board of Indirect Taxes and Customs (CBIC) introduced a deferred customs duty payment facility for eligible manufacturer importers aimed at helping companies effectively manage cash flows and working capital, supporting local manufacturing.

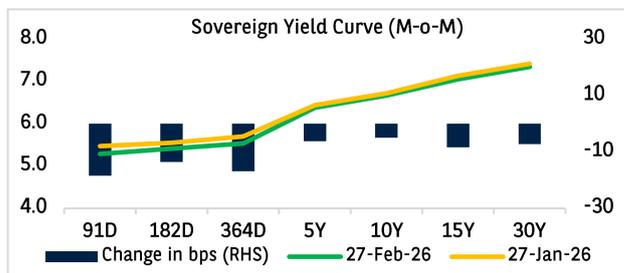
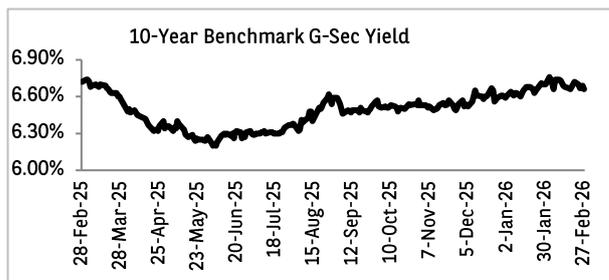
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	648,000	29,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.41	7.35	8.09	8.14	9.37	9.85
1-Yr	5.54	7.08	7.82	7.87	9.10	9.58
3-Yr	5.85	7.15	7.89	7.94	9.17	9.65
5-Yr	6.38	7.24	8.08	8.13	9.36	9.84
10-Yr	6.66	7.40	8.24	8.29	9.52	10.00

G-sec and corporate bonds data as of Feb 27

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'24)
GDP	7.8% (Oct-Dec FY26)	8.4% (Jul-Sep FY26)	7.4% (Oct-Dec FY25)
GST Collection (in Rs cr)	1,74,550 (Dec-25)	1,89,017 (Sep-25)	1,76,857 (Dec-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Feb 27	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	72.87	70.75	63.34	74.04
NYMEX Crude Oil (\$/bbl)	67.02	65.21	58.65	70.35
Gold (Rs / 10 gm)#	159097	158022	126057	85593

ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Feb 27	Feb 26
USD	90.95	90.91
GBP	122.54	123.25
Euro	107.37	107.44
100 Yen	58.34	58.27
Forex Reserve (\$ bn)*	723.61	725.73
Dollar Index	97.61	97.79

*Data pertains to Feb 20 and to Feb 13 respectively

Source: RBI, Financial Websites

International

- US Producer Prices rose to 152.17 points in January 2026, up from 151.45 points in December 2025.
- UK GfK Consumer Confidence Index dropped to -19 in February 2026, compared to -16 in January 2026.
- Eurozone consumer inflation expectations decreased to 2.6% in January 2026, compared to 2.8% in December 2025.
- Japan S&P Global Manufacturing PMI rose to 53 in February 2026 compared to 51.5 in January 2026.
- Japan housing starts fell 0.4% in January 2026, compared to a 1.3% in December 2025.
- Japan Construction Orders increased 5.7% in January 2026 compared to 20.2% in December 2025.

Commodities

- Crude oil prices rose by \$1.81 to \$67.02 a barrel on the NYMEX due to renewed geopolitical tensions in Middle East.

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