

Indian Indices	Jan 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	85440	-0.38	5.21	7.85	23.57
Nifty 50	26250	-0.30	5.45	9.35	22.85
BSE Mid cap	47564	0.05	4.13	1.34	32.97
Nifty Midcap	61266	-0.16	6.54	5.76	34.28
Nifty Smallcap	17926	0.53	0.27	-5.82	32.57
BSE SmallCap	51955	0.07	-2.66	-7.42	32.81

Source: BSE, NSE

Indian Indices	Jan 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	64003	0.30	7.19	18.15
BSE Bankex	67478	-0.01	7.55	16.49
BSE CD	61240	1.25	4.42	-7.61
BSE CG	67988	0.17	-2.12	-0.33
BSE FMCG	19620	0.51	-3.35	-7.10
BSE Healthcare	43987	-0.16	1.07	-2.97
BSE IT	36630	-1.37	9.18	-16.14
BSE Metal	37876	0.58	11.24	29.65
BSE Oil & Gas	28569	-1.18	5.44	6.53
BSE Power	6705	-0.31	-1.52	-4.68
BSE Realty	7115	2.16	4.49	-13.03

Source: BSE, NSE

Global Indices	Jan 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	48977	1.23	4.75	14.61
Nasdaq	23396	0.69	2.70	19.23
FTSE 100	10005	0.54	5.41	21.65
Nikkei 225	51833	2.97	13.25	2.97
Hang Seng	26347	0.03	-2.92	33.33

Source: Financial websites

Rs. Cr (Equity)	FII Inv Jan 2	MF Inv Jan 1	DII Inv Jan 5
Buy	8304	10437	14499
Sell	7657	9417	13019
Net	647	1020	1480
Net (YTD)	-2393	1020	3685

Source: NSDL, NSE

Debt Market Indicators	Jan 5	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.40%	5.35%
10 Yr Gilt^	6.64%	6.61%
91-day T-bill^	5.29%	5.24%
182-day T Bill^	5.45%	5.42%
364-day T Bill^	5.50%	5.51%
3-mth CP rate	6.73%	6.65%
6-mth CP rate	7.00%	6.95%
1-yr CP rate	7.10%	7.05%
3-mth CD rate	6.36%	6.23%
6-mth CD rate	6.62%	6.50%
12-mth CD rate	6.75%	6.70%
5 yr Corp Bond	7.20%	7.16%
Net LAF o/s (Rs Cr)*	-61460	-63086
M3 supply (Rs lakh Cr)**	290.58	291.36
G-sec Volume (Rs Cr)	51420	42415
SDF*	87255	97680
1 Year OIS	5.49%	5.48%
US 10-year Treasury Yield	4.17%	4.19%

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

** Dec 15 and Nov 28 respectively

► Indian Equity

- Indian equity benchmarks closed lower on Monday, dragged down by losses in IT and banking stocks amid concerns over US trade tariffs and rising funding costs.
- The top losers were HDFC Bank, Wipro, Infosys, HCL Technologies, and Oil & Natural Gas Corporation, down 1.41-2.31%.
- The top gainers were Nestle India, Bharat Electronics, Eicher Motors, Hindustan Unilever and Tata Steel, up 1.56-2.76%.

► Global Equity

- Wall Street stocks closed higher on Monday boosted by gains in financial and energy stocks on hopes US firms could access Venezuela's oil reserves.
- FTSE index closed higher on Monday driven by gains in precious metal miners and defence stocks after heightened US-Venezuela conflict.
- Strait Times Index ended higher on Monday due to stock-specific gains.
- Nikkei Index closed higher on Monday, driven by gains in tech and defence stocks as investors focused on domestic corporate developments and upcoming US economic data.
- Hang Seng Index ended marginally higher on Monday, supported by gains in the IT sector.
- At 8.30 AM, Asian Markets were mostly trading higher.

► Indian Debt

- The interbank call-money rate ended higher at 5.40% on Monday compared to 5.35% on Friday.
- Government bond prices ended lower on Monday after record state borrowing plans raising supply worries.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.63% on Monday compared to 6.61% on Friday.

► Capital Market

- Universal Music India (UMI) entered into a definitive agreement with Excel Entertainment to acquire a significant minority stake in the latter.
- Motherson Electronic Components Pvt Ltd has secured incentives under the government's production linked incentive scheme.
- Oil and Natural Gas Corporation entered a strategic partnership with Japanese shipping major Mitsui OSK Lines to strengthen its presence in specialised energy transportation.
- New Consolidated Construction Company Ltd (NCCCL) has bagged a Rs 112.5 crore contract from realty firm Lodha Developers.
- Coal India subsidiary Bharat Coking Coal Ltd (BCCL) plans to launch its initial public offering (IPO) to raise Rs 1,069 crore through a 100% offer for sale (OFS).
- Torrent Pharmaceuticals approved a plan to raise up to Rs 12,500 crore through the issuance of non-convertible debentures (NCDs).
- Waaree Energy Storage Solutions raised Rs 1,003 crore from strategic investors as part of its Rs 10,000-crore capital expenditure plan.

► Regulatory

- Reserve Bank of India (RBI) Governor Sanjay Malhotra emphasised the need for sound underwriting standards and close monitoring of asset quality during a meeting with the chief executive officers of non-banking finance companies (NBFCs).
- The Reserve Bank of India (RBI) to take over the general banking operations and public debt management of the Delhi government starting January 9, 2026.
- The Securities and Exchange Board of India (SEBI) notified phased rollout of a revised net worth requirement for existing Merchant Bankers (MBs) including higher capital adequacy, liquid net worth, underwriting limits, among others.

► Economy and Government

- The Haryana government has set up a high-level monitoring committee to speed up development projects and ensure timely execution.

Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	398,000	2,79,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.45	6.86	7.59	7.62	8.87	9.35
1-Yr	5.65	6.90	7.63	7.66	8.91	9.39
3-Yr	5.91	6.93	7.66	7.69	8.94	9.42
5-Yr	6.37	7.20	8.02	8.06	9.30	9.78
10-Yr	6.64	7.32	8.14	8.18	9.42	9.90

G-sec and corporate bonds data as of Jan 5

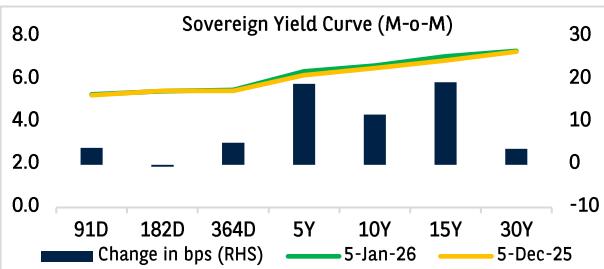
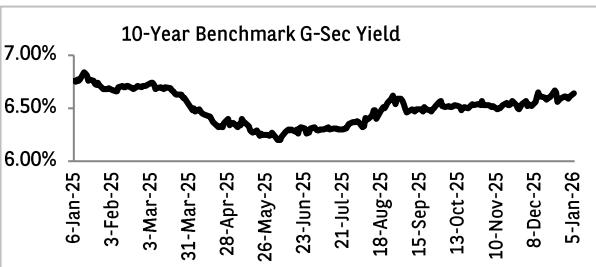
* Weighted average yields; Source: CRISIL

International

- US ISM Manufacturing PMI fell for a third consecutive month to 47.9 in December 2025, the lowest level since October 2024, compared to 48.2 in November.
- Japan S&P Global Manufacturing PMI edged higher to 50.0 in December 2025 compared to 48.7 in November 2025.

Commodities

- Crude oil prices rose by \$1 to \$58.32 a barrel on the NYMEX due to supply concerns amid potential disruptions to Venezuelan crude flows after rising tensions with the US.



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	0.71% (Nov'25)	2.07% (Aug'25)	5.48% (Nov'24)
IIP	6.7% (Nov'25)	4.0% (Aug'25)	5.0% (Nov'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
GST Collection (in Rs cr)	1,70,276 (Nov-25)	1,86,315 (Aug-25)	1,82,269 (Nov-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Jan 5	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Jan 5	Jan 2
London Brent Crude Oil (\$/bbl)	61.76	60.75	64.53	76.51	USD	90.27	90.12
NYMEX Crude Oil (\$/bbl)	58.32	57.32	60.88	73.96	GBP	121.28	121.35
Gold (Rs / 10 gm) #	136168	134782	116954	77504	Euro	105.52	105.84
# ibjarates spot prices					100 Yen	57.48	57.42
Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	696.61	693.32
					Dollar Index	98.27	98.42

*Data pertains to Dec 26 and to Dec 19 respectively

Source: RBI, Financial Websites

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