

Indian Indices	Apr 2	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	73320	0.25	-14.51	-4.30	20.15
Nifty 50	22713	0.15	-13.73	-2.65	19.96
BSE Mid cap	41404	-0.21	-12.90	-0.63	NA
Nifty Midcap	53677	-0.26	-12.53	3.12	33.18
Nifty Smallcap	15651	-0.38	-12.23	-3.17	26.67
BSE SmallCap	45087	0.28	-13.16	-4.35	NA

Source: BSE, NSE

Indian Indices	Apr 2	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53234	-0.65	-16.57	11.00
BSE Bankex	58009	0.22	-14.04	-1.93
BSE CD	53320	-0.87	-11.84	-1.99
BSE CG	66360	0.00	-2.23	7.22
BSE FMCG	17087	0.27	-12.47	-12.46
BSE Healthcare	41372	-0.75	-6.10	0.61
BSE IT	29288	2.42	-21.13	-17.83
BSE Metal	37816	0.35	0.42	23.27
BSE Oil & Gas	25653	-0.76	-11.27	1.15
BSE Power	6753	-0.17	0.41	3.26
BSE Realty	5219	1.19	-25.06	-21.31

Source: BSE, NSE

Global Indices	Apr 2	1D % Chg	3M % Chg	1Y % Chg
DJIA	46505	-0.13	-3.88	10.13
Nasdaq	21879	0.18	-5.84	24.31
FTSE 100	10436	0.69	4.88	21.23
Nikkei 225	52463	-2.38	4.22	46.85
Hang Seng	25117	-0.70	-4.64	8.25

Source: Financial websites

Rs. Cr (Equity)	FII Inv Apr 1	MF Inv Mar 27	DII Inv Apr 2
Buy	41117	29094	18421
Sell	60954	28877	11213
Net	-19837	218	7208
Net (YTD)	-148695	142720	257936

Source: NSDL, NSE

Debt Market Indicators	Apr 2	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.00%	7.00%
10 Yr Gilt^	7.12%	7.02%
91-day T-bill^	5.36%	5.40%
182-day T Bill^	5.63%	5.51%
364-day T Bill^	5.67%	5.70%
3-mth CP rate	7.20%	7.75%
6-mth CP rate	7.60%	7.65%
1-yr CP rate	7.70%	7.60%
3-mth CD rate	6.80%	7.35%
6-mth CD rate	7.25%	7.30%
12-mth CD rate	7.35%	7.25%
5 yr Corp Bond	7.72%	7.67%
Net LAF o/s (Rs Cr)*	-200550	-140141
M3 supply (Rs lakh Cr)**	301.93	302.98
G-sec Volume (Rs Cr)	42730	43245
SDF*	466280	321289
1 Year OIS	6.32%	6.26%
US 10-year Treasury Yield	4.31%	4.33%

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

**Mar 15 and Feb 28 respectively

Indian Equity

- Indian equity benchmarks closed higher on Thursday, buoyed by gains in banking and IT stocks ahead of the start of the fourth-quarter results season.
- The top gainers were HCL Technologies, Tech Mahindra, Tata Consumer Products, Wipro and Infosys, up 1.71% - 3.00%.
- The top losers were Asian Paints, Eicher Motors, Sun Pharmaceutical Industries, Eternal and Bajaj Auto, down 1.75% - 2.49%.

Global Equity

- Wall Street stocks closed mixed on Thursday with Nasdaq gaining due to technology stocks while Dow Jones declined as energy and industrial stocks stayed under pressure from geopolitical volatility.
- FTSE index closed higher on Thursday boosted by plans for UK-led talks on reopening the Strait of Hormuz by easing fears over disruptions to global trade routes.
- Strait Times Index ended lower on Thursday, dragged down after US President Donald Trump's speech on Iran gave no clear timeline for ending the conflict.
- Nikkei Index ended lower on Thursday, after US President's speech fuelled concerns over the Middle East conflict.
- Hang Seng Index ended lower on Thursday, dragged down after US President Donald Trump's speech on Iran gave no clear timeline for ending the conflict.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended lower at 5.00% on Thursday compared to 7.00% on Monday.
- Government bond prices ended lower on Thursday as renewed US-Iran tensions pushed oil prices higher, weighing on India's growth-inflation outlook ahead of the April 8th RBI policy decision.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.13% on Thursday compared to 7.00% on.

Capital Market

- Cabot Sanmar announced the expansion of their fumed silica manufacturing capacity with an investment of Rs 220 crore (\$25 million) to meet growing customer demand in India.
- Aquapulse raised Rs 25 crore in an ongoing Series A round led by NABVENTURES Ltd, the venture capital arm of NABARD, through the AgriSURE Fund, as it looks to build an integrated aquaculture ecosystem.
- India Infrastructure Finance Company Ltd (IIFCL) plans to raise up to \$1 billion through the MIGA guarantee fund during the ongoing first quarter to support infrastructure development across the country.

Regulatory

- Sebi considers re-introducing open market share buybacks through the stock exchange mechanism, a route that was discontinued earlier amid concerns over transparency and price discovery.

Economy and Government

- India HSBC Manufacturing PMI fell to 53.9 in March 2026 compared to 56.9 in February 2026.
- According to the RBI data, India Foreign Exchange Reserves decreased to \$688.06 billion in the week March 27 compared to \$698.35 billion in the previous week.
- The Uttar Pradesh (UP) government aims to purchase wheat worth over Rs 12,925 crore to support the farm economy during the current Rabi Marketing Season (2026-27).

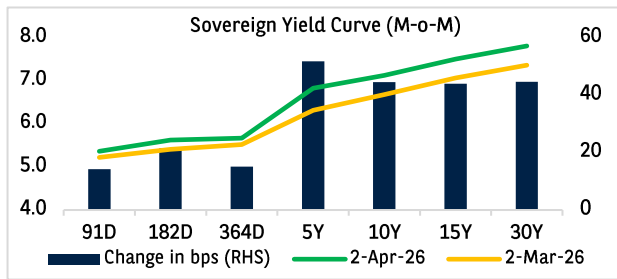
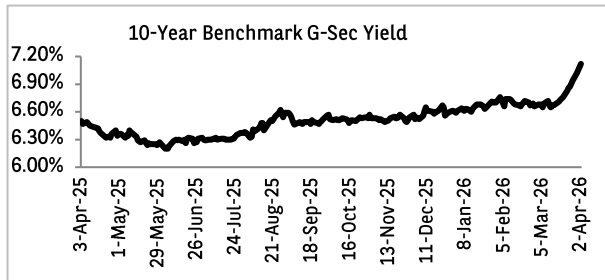
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	29,000	791,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.63	7.52	8.26	8.31	9.54	10.02
1-Yr	6.02	7.64	8.38	8.43	9.66	10.14
3-Yr	6.57	7.69	8.43	8.48	9.71	10.19
5-Yr	6.83	7.72	8.56	8.61	9.84	10.32
10-Yr	7.12	7.79	8.63	8.68	9.91	10.39

G-sec and corporate bonds data as of Apr 2

* Weighted average yields; Source: CRISIL



International

- The US economy added 178,000 jobs in March 2026, following a revised decline of 133,000 in February 2026.
- US unemployment rate fell to 4.3% in March 2026 compared to 4.4% in February 2026.
- US trade deficit widened slightly to \$57.3 billion in February 2026 compared to a revised \$54.7 billion in January 2026.
- US Initial jobless claims fell by 9,000 to 202,000 in the fourth week of March compared to 211,000 in the previous week.
- China RatingDog General Services PMI eased to 52.1 in March 2026 compared to 56.7 in February 2026 while the RatingDog General Composite PMI fell to 51.5 from 55.4.
- Japan S&P Global Composite PMI edged down to 53.0 in March 2026 compared to 53.9 in February 2026 while the S&P Global Services PMI eased to 53.4 from 53.8.

Commodities

- Crude oil prices rose by \$11.42 to \$111.54 a barrel on the NYMEX as renewed tensions around Iran and disruptions near the Strait of Hormuz raised fears of tighter global supply.

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	Apr 2	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	109.03	101.16	60.75	74.95
NYMEX Crude Oil (\$/bbl)	111.54	100.12	57.32	71.71
Gold (Rs / 10 gm)#	146608	150853	134782	90996

ibjarates spot prices
Source: Financial Websites, IBIJA

Currencies Vs INR	Apr 2	Mar 30
USD	93.21	94.65
GBP	123.19	125.63
Euro	107.48	109.01
100 Yen	58.49	59.25
Forex Reserve (\$ bn)*	688.06	698.35
Dollar Index	100.03	99.65

*Data pertains to Mar 27 and to Mar 20 respectively

Source: RBI, Financial Websites

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