

| Indian Indices | Jan 7 | 1D % Chg | 3M % Chg | 1Y % Chg | PE |
|----------------|-------|----------|----------|----------|-------|
| BSE Sensex | 84961 | -0.12 | 3.70 | 8.65 | 23.44 |
| Nifty 50 | 26141 | -0.14 | 4.11 | 10.26 | 22.76 |
| BSE Mid cap | 47673 | 0.47 | 3.20 | 3.31 | 33.05 |
| Nifty Midcap | 61425 | 0.45 | 5.38 | 8.01 | 34.37 |
| Nifty Smallcap | 17959 | 0.39 | -0.14 | -3.83 | 32.63 |
| BSE SmallCap | 51817 | 0.12 | -2.58 | -6.27 | 32.72 |

Source: BSE, NSE

| Indian Indices | Jan 7 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|-------|----------|----------|----------|
| BSE Auto | 63651 | -0.68 | 6.00 | 20.10 |
| BSE Bankex | 67513 | -0.06 | 6.60 | 18.39 |
| BSE CD | 62271 | 1.25 | 5.90 | -4.69 |
| BSE CG | 67836 | 0.41 | -2.42 | 0.83 |
| BSE FMCG | 19607 | -0.18 | -2.75 | -5.38 |
| BSE Healthcare | 44781 | 0.42 | 1.64 | -1.55 |
| BSE IT | 37490 | 1.97 | 9.88 | -13.47 |
| BSE Metal | 37995 | 0.04 | 12.96 | 32.92 |
| BSE Oil & Gas | 28006 | -0.76 | 1.88 | 6.26 |
| BSE Power | 6670 | -0.30 | -2.02 | -2.14 |
| BSE Realty | 7067 | -0.39 | 2.01 | -11.64 |

Source: BSE, NSE

| Global Indices | Jan 7 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|-------|----------|----------|----------|
| DJIA | 48996 | -0.94 | 5.14 | 15.21 |
| Nasdaq | 23584 | 0.16 | 3.49 | 21.01 |
| FTSE 100 | 10048 | -0.74 | 5.95 | 21.87 |
| Nikkei 225 | 51962 | -1.06 | 8.37 | 29.63 |
| Hang Seng | 26459 | -0.94 | -1.85 | 36.05 |

Source: Financial websites

| Rs. Cr (Equity) | FII Inv Jan 6 | MF Inv Jan 5 | DII Inv Jan 7 |
|-----------------|---------------|--------------|---------------|
| Buy | 15512 | 11831 | 16685 |
| Sell | 15529 | 11427 | 13694 |
| Net | -16 | 404 | 2992 |
| Net (YTD) | -1672 | 858 | 8206 |

Source: NSDL, NSE

| Debt Market Indicators | Jan 7 | 1D Ago |
|---------------------------|--------|--------|
| Repo Rate | 5.25% | 5.25% |
| Call Rate | 5.35% | 4.80% |
| 10 Yr Gilt^ | 6.61% | 6.62% |
| 91-day T-bill^ | 5.26% | 5.29% |
| 182-day T Bill^ | 5.49% | 5.45% |
| 364-day T Bill^ | 5.56% | 5.53% |
| 3-mth CP rate | 6.80% | 6.73% |
| 6-mth CP rate | 7.05% | 7.00% |
| 1-yr CP rate | 7.10% | 7.10% |
| 3-mth CD rate | 6.50% | 6.36% |
| 6-mth CD rate | 6.72% | 6.62% |
| 12-mth CD rate | 6.83% | 6.78% |
| 5 yr Corp Bond | 7.21% | 7.20% |
| Net LAF o/s (Rs Cr)* | -92426 | -76441 |
| M3 supply (Rs lakh Cr)** | 290.58 | 291.36 |
| G-sec Volume (Rs Cr) | 45400 | 44740 |
| SDF* | 118221 | 116861 |
| 1 Year OIS | 5.46% | 5.48% |
| US 10-year Treasury Yield | 4.15% | 4.18% |

*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 Wednesday, weighed down by selling pressure in heavyweight stocks amid escalating geopolitical concerns.
- The top losers were Cipla, Maruti Suzuki India, Power Grid Corporation of India, Tata Motors Passenger Vehicles and Max Healthcare Institute, down 1.59-4.28%.
- The top gainers were Titan Company, HCL Technologies, Wipro, Tech Mahindra and Jio Financial Services, up 1.73-3.94%.

► Global Equity

- Wall Street stocks closed mixed on Wednesday with Nasdaq gaining supported by optimism around AI stocks while Dow Jones declined dragged down by losses in financial stocks.
- FTSE index closed lower on Wednesday dragged down by energy and financial stocks as investors were cautious around US-Venezuela conflict.
- Strait Times Index ended higher on Wednesday, tracking Wall Street gains.
- Nikkei Index closed lower on Wednesday, due to China's ban on exports of dual-use items to the country.
- Hang Seng Index ended lower on Wednesday, owing to rising geopolitical concerns after China imposed sanctions on Japan.
- At 8.30 AM, Asian Markets were mostly trading lower.

► Indian Debt

- The interbank call-money rate ended higher at 5.35% on Wednesday compared to 4.80% on Tuesday.
- Government bond prices ended flat on Wednesday as RBI purchases focused in illiquid papers amid persistent supply concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.61% on Wednesday.

► Capital Market

- Tata Power Renewable Energy Ltd (TPREL) plans to set up a greenfield 10 GW ingot and wafer manufacturing facility at Nellore, Andhra Pradesh, with an investment of Rs 6,675 crore.
- CMS Info Systems Ltd. bagged a Rs 1,000 crore, 10-year contract from the State Bank of India (SBI).
- Inox Clean Energy Limited, secured equity funding of about Rs 3,100 crore along with its subsidiary, Inox Solar Limited.

► Regulatory

- Sebi extended the timeline till March 1 for the implementation of an additional incentives structure for mutual fund distributors for onboarding new individual investors from B-30 cities and new women investors from any city.

► Economy and Government

- According to the first advance estimates released by the National Statistics Office (NSO) India's economy is expected to grow 7.4% in the financial year ending March 2026, exceeding the government's earlier projection of 6.3-6.8%.
- As per report, India's gross value added (GVA) for agriculture and allied activities is expected to grow at a modest rate of 3.1% in real terms in financial year 2025-26 (FY26), down from 4.6% in the last financial year despite a good monsoon and strong crop production.
- The government is likely to achieve its fiscal deficit target of 4.4% despite a lower than budgeted print for the nominal gross domestic product (GDP) growth of 8% in the first advance estimates.
- The government released another draft of the Pesticides Management Bill to replace the Insecticides Act, 1968, and, under it, the Insecticides Rules, 1971.

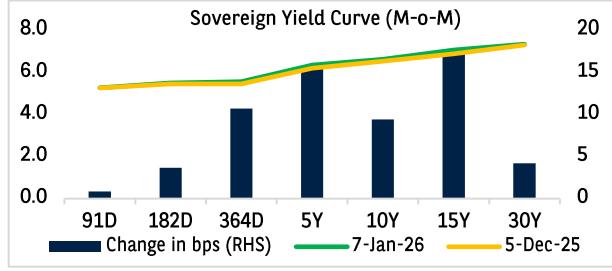
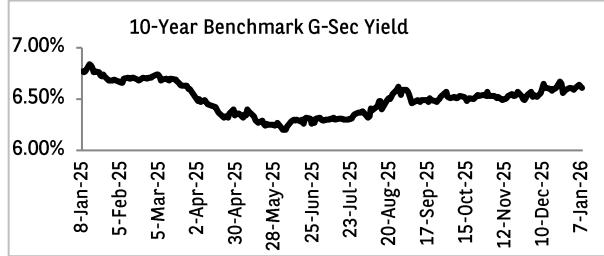
| Borrowing (in Rs cr) | Total | Completed | Balance |
|----------------------|---------|-----------|----------|
| FY 2025 | 677,000 | 398,000 | 2,79,000 |

Source: RBI

| Yields (%) | G-sec* | AAA | AA+ | AA | AA- | A+ |
|------------|--------|------|------|------|------|------|
| 6-mth | 5.49 | 6.92 | 7.66 | 7.71 | 8.94 | 9.42 |
| 1-Yr | 5.66 | 6.95 | 7.69 | 7.74 | 8.97 | 9.45 |
| 3-Yr | 5.91 | 6.97 | 7.71 | 7.76 | 8.99 | 9.47 |
| 5-Yr | 6.34 | 7.21 | 8.05 | 8.10 | 9.33 | 9.81 |
| 10-Yr | 6.61 | 7.33 | 8.17 | 8.22 | 9.45 | 9.93 |

G-sec and corporate bonds data as of Jan 7

* Weighted average yields; Source: CRISIL



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) | 1,74,550 (Dec-25) | 1,89,017 (Sep-25) | 1,76,857 (Dec-24) | |

Source: CRISIL, Mospo, Financial Websites

| Commodity Prices | Jan 7 | 1D Ago | 3M Ago | 1Y Ago |
|---------------------------------|--------|--------|--------|--------|
| London Brent Crude Oil (\$/bbl) | 59.96 | 60.7 | 65.45 | 77.05 |
| NYMEX Crude Oil (\$/bbl) | 55.99 | 57.13 | 61.73 | 74.25 |
| Gold (Rs / 10 gm) # | 136675 | 136660 | 119941 | 77126 |
| # ibjartes spot prices | | | | |

Source: Financial Websites, IBJA

| Currencies Vs INR | Jan 7 | Jan 6 |
|------------------------|--------|--------|
| USD | 89.94 | 90.18 |
| GBP | 121.49 | 122.21 |
| Euro | 105.18 | 105.81 |
| 100 Yen | 57.53 | 57.65 |
| Forex Reserve (\$ bn)* | 696.61 | 693.32 |
| Dollar Index | 98.68 | 98.58 |

*Data pertains to Dec 26 and to Dec 19 respectively

Source: RBI, Financial Websites

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