

Indian Indices	May 7	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77845	-0.15	-6.86	-3.59	21.07
Nifty 50	24327	-0.02	-5.32	-0.36	21.16
BSE Mid cap	47567	0.95	3.61	10.70	NA
Nifty Midcap	62003	1.10	4.18	14.21	36.11
Nifty Smallcap	18696	0.87	10.08	13.87	31.74
BSE SmallCap	54015	1.38	10.50	14.01	NA

Source: BSE, NSE

Indian Indices	May 7	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60132	1.81	-1.72	16.11
BSE Bankex	63099	0.07	-6.59	1.95
BSE CD	59364	-0.52	2.85	4.47
BSE CG	80321	2.05	18.55	28.75
BSE FMCG	18979	-0.45	-0.13	-7.51
BSE Healthcare	46393	0.35	10.60	10.51
BSE IT	28247	-0.56	-17.77	-19.81
BSE Metal	43118	0.46	9.56	48.21
BSE Oil & Gas	27699	-0.16	-5.01	3.57
BSE Power	8321	1.23	22.14	26.81
BSE Realty	6422	0.88	-0.18	-4.21

Source: BSE, NSE

Global Indices	May 7	1D % Chg	3M % Chg	1Y % Chg
DJIA	49597	-0.63	-1.04	20.63
Nasdaq	25806	-0.13	12.05	45.48
FTSE 100	10277	-1.55	-0.89	20.07
Nikkei 225	62834	5.58	15.81	70.84
Hang Seng	26626	1.57	0.25	17.34

Source: Financial websites

Rs. Cr (Equity)	FII Inv May 6	MF Inv May 5	DII Inv May 7
Buy	14756	12886	17032
Sell	20496	11069	16591
Net	-5740	1817	441
Net (YTD)	-203916	188418	309264

Source: NSDL, NSE

Debt Market Indicators	May 7	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.10%	5.10%
10 Yr Gilt^	6.93%	6.91%
91-day T-bill^	5.29%	5.29%
182-day T Bill^	5.43%	5.45%
364-day T Bill^	5.63%	5.64%
3-mth CP rate	7.13%	7.10%
6-mth CP rate	7.45%	7.35%
1-yr CP rate	7.77%	7.77%
3-mth CD rate	6.57%	6.57%
6-mth CD rate	6.97%	6.98%
12-mth CD rate	7.35%	7.35%
5 yr Corp Bond	7.66%	7.69%
Net LAF o/s (Rs Cr)*	-272659	-289225
M3 supply (Rs lakh Cr)**	309.27	314.66
G-sec Volume (Rs Cr)	60565	84270
SDF*	272659	289225
1 Year OIS	5.87%	5.88%
US 10-year Treasury Yield	4.41%	4.36%

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

**Apr 15 and Mar 31 respectively

Indian Equity

- Indian equity benchmarks closed flat on Thursday, as optimism over a possible agreement to end the conflict in West Asia balanced out profit-taking in certain sectors following a strong rally the day before.
- The top losers were Hindustan Unilever, Tata Consultancy Services, Titan Company, Tech Mahindra and ITC, down 1.01-1.90%.
- The top gainers were HDFC Life Insurance Company, Bajaj Auto, Mahindra & Mahindra, Grasim Industries and NTPC, up 1.28-3.57%.

Global Equity

- Wall Street stocks ended lower on Thursday led by selloff in Intel and other chip stocks and sentiments were also weighed down by volatile oil prices and cautious positioning ahead of key US jobs data.
- FTSE index fell on Thursday with oil and defence stocks leading the decline while investors remained cautious ahead of the local and regional elections.
- Strait Times Index ended higher on Thursday, owing to stock-specific gains.
- Nikkei Index edged higher on Thursday, fuelled by optimism over tech earnings and a potential deal ending the conflict in West Asia.
- Hang Seng Index closed in the green on Thursday, buoyed by hopes of easing uncertainties in West Asia, amid a global rally driven by falling crude oil prices and rising interest in artificial intelligence.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended flat at 5.10% on Thursday.
- Government bond prices ended marginally lower on Thursday, due to profit-booking at higher level.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.93% on Thursday compared to 6.92% on Wednesday.

Capital Market

- Axis Bank Ltd secured a \$500 million offshore loan from Mitsubishi UFJ Financial Group Inc. for three years at SOFR plus 85 basis points, to be used for lending and general business purposes amid rising credit demand.
- InCred Holdings filed its draft red herring prospectus with SEBI to raise funds through an IPO, which includes a fresh issue of up to Rs 1,250 crore.
- The Reserve Bank of India has approved Kotak Mahindra Bank to acquire up to 9.99% of Federal Bank, which could position Kotak as one of Federal Bank's largest institutional shareholders.
- Alpha Corp Development Ltd will invest around Rs 900 crore to finish three stalled residential and commercial projects in Greater Noida and Gurugram, bringing relief to more than 3,000 existing buyers.
- Fairfax India plans to invest Rs 2,000 crore in IIFL Capital via its subsidiary FIH Mauritius, raising its stake to at least 51% and securing the right to nominate two directors, subject to shareholder and regulatory approvals.

Regulatory

- SEBI immediately discontinued the Investor Risk Reduction Access (IRRA) platform, citing enhanced technological resilience among brokers and the presence of alternative contingency mechanisms.

Economy and Government

- The Indian government launched NPS Sanchay on May 6 to provide simple retirement savings options for informal workers, with a default investment structure to reduce complexity.
- The Indian government extended the provisions of five state legislations, three from Punjab and two from Haryana to the Union Territory of Chandigarh through notifications under Section 87 of the Punjab Reorganisation Act, 1966, as part of efforts to modernize legal frameworks, enhance transparency, and improve ease of living and doing business.

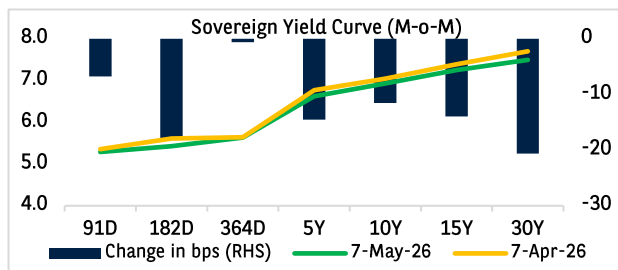
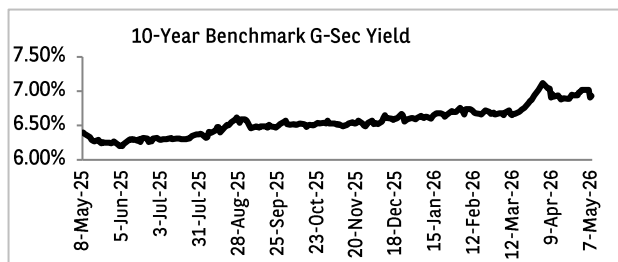
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	156,000	664,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.43	7.13	7.87	7.92	9.15	9.63
1-Yr	5.78	7.45	8.19	8.24	9.47	9.95
3-Yr	6.31	7.60	8.34	8.39	9.62	10.10
5-Yr	6.62	7.66	8.50	8.55	9.78	10.26
10-Yr	6.93	7.69	8.53	8.58	9.81	10.29

G-sec and corporate bonds data as of May 7

* Weighted average yields; Source: CRISIL



International

- US Initial Jobless Claims rose by 10,000 to 200,000 in the last week of April compared to 190,000 in the previous period.
- US non-farm business sector labor productivity rose by 0.8% in the first quarter of 2026, compared to revised 1.6% increase in the previous quarter.
- Eurozone S&P Global Construction PMI fell to 41.7 in April 2026 compared to 44.6 in March 2026.
- Eurozone retail sales rose by 1.2% year-over-year in March 2026 compared to 1.3% rise in February 2026.
- UK S&P Global Construction PMI rose to 39.7 in April of 2026 compared to 45.6 in March 2026.
- Japan's S&P Global Services PMI was revised slightly lower to 51.0 in April 2026 from 51.2 in the flash reading and down from March's final 53.4 while Composite PMI eased to 52.2 in April, below the flash reading of 52.4 and down from 53.0 in March.

Commodities

- Crude oil prices fell by 27 cents to \$94.81 a barrel on the NYMEX on optimism that US and Tehran were moving toward a limited, temporary agreement to halt their conflict.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.40% (Mar'26)	1.33% (Dec'25)	3.34% (Mar'25)
IIP	4.1% (Mar'26)	8.0% (Dec'25)	3.9% (Mar'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)	2,42,702 (Apr'26)	1,93,384 (Jan'26)	2,36,716 (Apr'25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	May 7	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	100.06	101.27	68.05	61.12
NYMEX Crude Oil (\$/bbl)	94.81	95.08	63.55	58.07
Gold (Rs / 10 gm)#	151149	150860	152078	97426

ibjarrates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	May 7	May 6
USD	94.78	95.16
GBP	128.85	129.27
Euro	111.35	111.65
100 Yen	60.61	60.84
Forex Reserve (\$ bn)*	698.49	703.31
Dollar Index	98.25	98.02

*Data pertains to Apr 24 and to Apr 17 respectively

Source: RBI, Financial Websites

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