

Indian Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80711	-0.01	-0.90	-1.81	22.34
Nifty 50	24741	0.03	-0.04	-1.61	21.73
BSE Mid cap	45460	-0.10	-0.48	-7.60	33.43
Nifty Midcap	57075	0.20	-2.11	-3.99	31.10
Nifty Smallcap	17655	0.19	-4.22	-9.56	31.56
BSE SmallCap	52752	0.09	-0.86	-6.67	30.96

Source: BSE, NSE

Indian Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58883	1.30	12.57	0.80
BSE Bankex	60501	0.03	-3.62	3.56
BSE CD	62399	0.10	8.24	-3.10
BSE CG	66853	-0.25	-5.85	-7.63
BSE FMCG	20739	-1.22	1.48	-10.85
BSE Healthcare	44254	0.02	2.80	1.52
BSE IT	34049	-1.25	-7.19	-21.37
BSE Metal	32165	0.71	4.47	2.03
BSE Oil & Gas	25842	-0.08	-3.84	-20.28
BSE Power	6542	0.04	-3.35	-19.22
BSE Realty	6782	-1.07	-11.97	-16.65

Source: BSE, NSE

Global Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	45401	-0.48	7.28	11.40
Nasdaq	21700	-0.03	12.45	26.70
FTSE 100	9208	-0.09	4.51	11.73
Nikkei 225	43019	1.03	14.55	17.35
Hang Seng	25418	1.43	6.32	45.71

Source: Financial websites

Rs. Cr (Equity)	FII Inv Sep 4	MF Inv Sep 2	DII Inv Sep 5
Buy	12336	9049	10031
Sell	13020	8375	8257
Net	-685	673	1774
Net (YTD)	-137540	357140	508086

Source: NSDL, NSE

Debt Market Indicators	Sep 5	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.00%	5.50%
10 Yr Gilt^	6.46%	6.50%
91-day T-bill^	5.48%	5.51%
182-day T Bill^	5.60%	5.60%
364-day T Bill^	5.63%	5.63%
3-mth CP rate	6.45%	6.45%
6-mth CP rate	6.55%	6.55%
1-yr CP rate	6.80%	6.80%
3-mth CD rate	5.81%	5.81%
6-mth CD rate	6.13%	6.13%
12-mth CD rate	6.38%	6.38%
5 yr Corp Bond	6.94%	6.95%
Net LAF o/s (Rs Cr)*	-299357	-305928
M3 supply (Rs lakh Cr)**	283.08	282.90
G-sec Volume (Rs Cr)	61790	74460
SDF*	149334	118742
1 Year OIS	5.49%	5.51%
US 10-year Treasury Yield	4.10%	4.17%

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

**Aug 22 and Aug 8 respectively

Indian Equity

- Indian equity benchmarks closed flat on Friday as profit booking, US tariff concerns and persistent foreign outflows offset gains from positive global cues and hopes of rate cuts by the US Federal Reserve (Fed).
- The top gainers were, Eicher Motors, Mahindra & Mahindra, Maruti Suzuki, Power Grid Corporation and Dr Reddy's Labs, up 1.21-2.42%.
- The top losers were ITC, HCL Tech, Cipla, TCS and Tech Mahindra, down 1.50-2.06%.

Global Equity

- Wall Street stocks closed lower on Friday dragged down by banking stocks as sharp weakness in August job growth fueled economic worries.
- FTSE index closed lower on Friday, weighed down by energy and banking stocks as investors digested domestic and US economic data.
- Strait Times Index closed higher on Friday boosted by the hope of the US rate cut.
- Nikkei Index closed higher on Friday on a rally in the technology stocks.
- Hang Seng Index closed higher on Friday as the expectations of a rate cut by the US Fed boosted sentiments.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended lower at 5.00% on Friday compared to 5.50% on Thursday.
- Government bond prices rose on Friday after Union Finance Minister reaffirmed commitment to the fiscal deficit target.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.47% on Friday compared to 6.49% on Thursday.

Capital Market

- Chartered Speed Ltd has filed preliminary papers with markets regulator Sebi to raise Rs 855 crore through an initial public offering (IPO).
- Knack Packaging filed draft papers with Sebi to raise Rs 475 cr through an Initial Public Offering (IPO) to support its expansion plans.
- Edtech unicorn PhysicsWallah has filed updated draft papers with Sebi to raise Rs 3,820 crore through an initial public offering (IPO) for expansion and growth initiatives.
- Karbonsteel Engineering raised close to Rs 17 crore from anchor investors ahead of its upcoming initial public offering (IPO).
- Amber Enterprises plans to raise a total of Rs 1,200 crore from private equity investors through issuance of equity shares and compulsorily convertible preference shares in its subsidiary ILJIN Electronics.

Regulatory

- The Securities and Exchange Board of India (Sebi) cautioned investors against fraudsters impersonating Sebi officials and using the regulator's letterhead, logo, and seal in fraudulent communications.
- Sebi issued a circular to streamline the process for surrendering KYC registration to ensure an orderly winding down of such agencies' operations while safeguarding investors' interests.
- The Securities and Exchange Board of India (Sebi) is expected to clear a wide range of reforms at its upcoming board meeting on September 12.

Economy and Government

- Chief Economic Adviser V Anantha Nageswaran said, given the expectation of benign inflation, there may be a shortfall in nominal GDP growth compared to the Budget estimate of 10.1% for the current financial year.
- India's forex reserves jumped by \$ 3.51 billion to \$ 694.23 billion for the week ended August 29.
- Finance Minister Nirmala Sitharaman said the recent Goods and Services Tax (GST) overhaul is not limited to rate reductions but is designed to make life easier for both businesses and consumers.

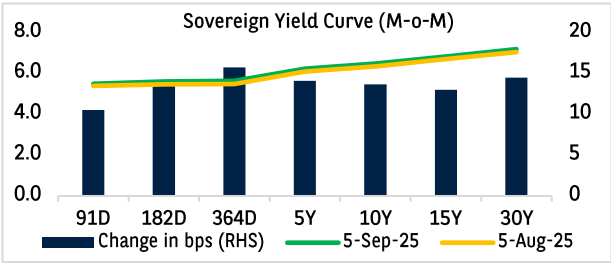
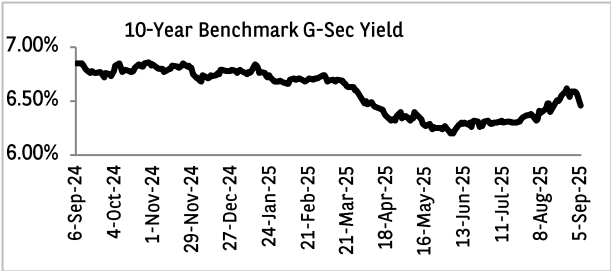
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	6,79,000	1,21,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.60	6.45	7.16	7.20	8.43	8.96
1-Yr	5.64	6.77	7.48	7.52	8.75	9.28
3-Yr	6.07	6.89	7.60	7.64	8.87	9.40
5-Yr	6.22	6.94	7.75	7.78	9.02	9.55
10-Yr	6.46	7.23	8.04	8.07	9.31	9.84

G-sec and corporate bonds data as of Sep 5

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	1.55% (Jul-25)	3.16% (Apr-25)	3.60% (Jul-24)
IIP	3.5% (Jul-25)	2.6% (Apr-25)	5.0% (Jul-24)
GDP	7.8% (Apr-Jun FY25)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY24)
GST Collection (in Rs cr)	1,86,315 (Aug-25)	2,01,050 (May-25)	1,74,962 (Aug-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Sep 5	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.5	66.99	65.34	72.69
NYMEX Crude Oil (\$/bbl)	61.87	63.48	63.37	69.15
Gold (Rs / 10 gm)#	106338	105945	98163	71875

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Source: Financial Websites, IBIA

Currencies Vs INR	Sep 5	Sep 4
USD	88.32	88.16
GBP	118.92	118.43
Euro	103.08	102.75
100 Yen	59.59	59.49
Forex Reserve (\$ bn)*	694.23	690.72
Dollar Index	97.77	98.35

*Data pertains to Aug 29 and to Aug 22 respectively

Source: RBI, Financial Websites

International

- US nonfarm payrolls rose by 22,000 in August 2025, compared to an upwardly revised 79,000 in July 2025.
- US unemployment rate rose to 4.3% in August 2025 compared to 4.2% in July 2025.
- The Eurozone economy expanded 1.5% year-on-year in the second quarter of 2025, compared to an upwardly revised 1.6% in Q1.
- UK Retail Sales increased 1.1% year-on-year in July 2025 compared to a downwardly revised 0.9% gain in June 2025.
- UK Halifax House Price Index rose 2.2% year-on-year in August 2025, compared to 2.5% in July 2025.
- The Japanese economy grew by 2.2% on an annualized basis in Q2 2025 compared to a downwardly revised 0.3% increase in Q1.
- Japan Bank Lending rose 3.6% in August 2025, accelerating compared to a 3.2% gain in July 2025.

Commodities

- Crude oil prices fell by \$1.61 to \$61.87 a barrel on the NYMEX on demand concerns following weak US jobs data.
- Opec+ has agreed in principle to increase production again next month, according to delegates, as the group doubles down on its policy shift to pursue market share instead of defending prices.

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