

Indian Indices	Sep 8	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80787	0.09	-1.71	-0.49	22.39
Nifty 50	24773	0.13	-0.92	-0.32	21.76
BSE Mid cap	45609	0.33	-1.06	-5.97	33.54
Nifty Midcap	57361	0.50	-1.62	-1.95	31.26
Nifty Smallcap	17684	0.16	-4.06	-8.26	31.61
BSE SmallCap	52911	0.30	-0.99	-5.48	31.05

Source: BSE, NSE

Indian Indices	Sep 8	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60720	3.12	14.36	5.31
BSE Bankex	60550	0.08	-4.73	5.69
BSE CD	61959	-0.71	6.09	-3.00
BSE CG	67101	0.37	-5.22	-5.68
BSE FMCG	20668	-0.34	0.94	-10.52
BSE Healthcare	44127	-0.29	2.09	1.52
BSE IT	33777	-0.80	-8.31	-21.17
BSE Metal	32279	0.36	3.23	3.05
BSE Oil & Gas	25916	0.28	-4.30	-18.26
BSE Power	6551	0.14	-3.96	-17.98
BSE Realty	6812	0.44	-15.58	-15.56

Source: BSE, NSE

Global Indices	Sep 8	1D % Chg	3M % Chg	1Y % Chg
DJIA	45515	0.25	6.44	12.81
Nasdaq	21799	0.45	11.62	30.60
FTSE 100	9221	0.14	4.34	12.71
Nikkei 225	43644	1.45	15.64	19.93
Hang Seng	25634	0.85	7.74	46.95

Source: Financial websites

Rs. Cr (Equity)	FII Inv Sep 3	MF Inv Sep 2	DII Inv Sep 8
Buy	12336	9049	10770
Sell	13020	8375	7883
Net	-685	673	2887
Net (YTD)	-137540	357140	510974

Source: NSDL, NSE

Debt Market Indicators	Sep 8	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 higher on Monday, driven by gains in auto and metals shares following the GST tax cut announcement, China's steel reforms and hopes of a Fed rate cut.
- The top gainers were Tata Motors, Mahindra & Mahindra, Bajaj Auto, Eicher Motors and JSW Steel, up 2.64-4.02%.
- The top losers were Trent, Asian Paints, Nestle, Coal India and Dr Reddys Labs, down 1.38-3.85%.

## Global Equity

- Wall Street stocks closed higher on Monday as weak US jobs data fueled expectations of Fed rate cuts to support growth.
- FTSE index closed higher on Monday supported by gains in industrials and banking stocks.
- Strait Times Index closed flat on Monday, as gains from Fed rate cut expectations were offset by stock-specific losses.
- Nikkei Index closed higher on Monday, as a weaker yen helped boost exporters' shares.
- Hang Seng Index closed higher on Monday owing to sector-specific gains.
- 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

- LG Electronics to launch Rs 15,000-cr IPO in October.
- Venture Catalysts closed a Rs 150 crore funding round, comprising a mix of primary and secondary transactions.
- Glass Walls Systems (India) has filed a draft red herring prospectus (DRHP) with Sebi for its maiden public issue to raise Rs 60 cr.
- Asian Energy Services received approval for a draft scheme of merger with Oilmax Energy Pvt. Ltd.
- Ujjivan Small Finance Bank (Ujjivan SFB) plans to raise Rs 2,000 crore through a qualified institutional placement (QIP) over the next 18-24 months.
- Shivalaya Construction filed preliminary papers with markets regulator Sebi for raising funds through an initial public offering to pare its debt.

## Regulatory

- The Department of Telecommunications (DoT) has come out with draft rules for the provision of main telecom services under the authorisation regime, as outlined in the Telecom Act 2023.

## Economy and Government

- Chief Economic Adviser V Anantha Nageswaran said the 50% tariff imposed by the US could reduce India's gross domestic product (GDP) by 0.5 per cent in FY26.
- The Union Finance Ministry said India and Israel signed a Bilateral Investment Treaty (BIT) in New Delhi to boost financial and economic ties between the two countries.
- The GST Council has eased compliance for businesses by eliminating the need to link credit notes to specific invoices.
- The Karnataka government launched the Experiential Learning Programme by the BFSI Consortium's Bengaluru Chapter, in collaboration with the Department of Electronics, IT & Biotechnology and the Department of Higher Education, to bridge the education-to-employability gap by introducing industry-vetted curriculum in undergraduate institutions across the state.

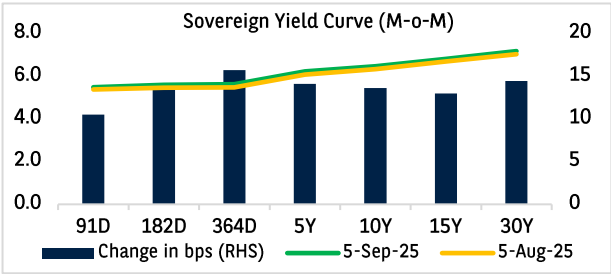
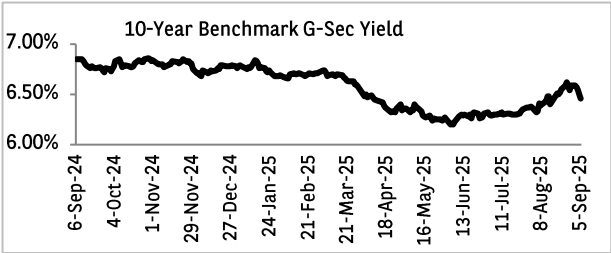
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	6,79,000	1,21,000

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 8	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.02	65.5	66.47	71.06
NYMEX Crude Oil (\$/bbl)	62.26	61.87	64.58	67.67
Gold (Rs / 10 gm)#	108037	106338	97145	71931
# ibjarates spot prices				

Source: Financial Websites, IBJA

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 consumer inflation expectations rose to 3.2% in August 2025 compared to 3.1% in July 2025.
- China trade surplus came in at \$102.33 billion in August 2025, compared to \$91.29 billion recorded in the same month a year earlier, as exports continued to outpace imports.
- Japan Economy Watchers Survey rose to 46.7 in August 2025 compared to 45.2 in July 2025 while the Economy Watchers Survey Outlook increased to 47.5 from 47.3.

Commodities

- Crude oil prices rose by 39 cents to \$62.26 a barrel on the NYMEX due to smaller-than-expected OPEC+ output hike and potential new sanctions on Russian crude.

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