

Indian Indices	Dec 8	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	85103	-0.71	5.34	4.15	23.21
Nifty 50	25961	-0.86	4.79	5.20	22.60
BSE Mid cap	45811	-1.73	0.44	-3.90	31.49
Nifty Midcap	59488	-1.83	3.71	1.33	32.77
Nifty Smallcap	17052	-2.61	-3.58	-12.52	30.67
BSE SmallCap	49967	-2.20	-5.56	-12.42	31.54

Source: BSE, NSE

Indian Indices	Dec 8	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61361	-1.21	1.06	13.29
BSE Bankex	66448	-0.85	9.74	8.94
BSE CD	59876	-1.57	-3.36	-8.84
BSE CG	65733	-2.83	-2.04	-9.73
BSE FMCG	19965	-1.27	-3.40	-5.70
BSE Healthcare	43733	-1.56	-0.89	-1.75
BSE IT	37176	-0.51	10.06	-16.50
BSE Metal	33576	-1.96	4.02	5.96
BSE Oil & Gas	27658	-1.04	6.72	1.20
BSE Power	6382	-1.84	-2.59	-16.36
BSE Realty	6693	-3.50	-1.74	-20.23

Source: BSE, NSE

Global Indices	Dec 8	1D % Chg	3M % Chg	1Y % Chg
DJIA	47739	-0.45	4.89	6.94
Nasdaq	23546	-0.14	8.02	18.56
FTSE 100	9645	-0.23	4.59	16.09
Nikkei 225	50582	0.18	15.90	29.39
Hang Seng	25765	-1.23	0.51	29.70

Source: Financial websites

Rs. Cr (Equity)	FII Inv Dec 5	MF Inv Dec 3	DII Inv Dec 8
Buy	12111	12332	15950
Sell	12128	10769	13491
Net	-16	1564	2460
Net (YTD)	-152999	469004	695964

Source: NSDL, NSE

Debt Market Indicators	Dec 8	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.20%	5.35%
10 Yr Gilt^	6.56%	6.52%
91-day T-bill^	5.25%	5.25%
182-day T Bill^	5.43%	5.45%
364-day T Bill^	5.46%	5.45%
3-mth CP rate	6.40%	6.35%
6-mth CP rate	6.65%	6.60%
1-yr CP rate	6.85%	6.80%
3-mth CD rate	5.90%	5.87%
6-mth CD rate	6.23%	6.22%
12-mth CD rate	6.43%	6.40%
5 yr Corp Bond	6.84%	6.82%
Net LAF o/s (Rs Cr)*	-224658	-218657
M3 supply (Rs lakh Cr)**	289.45	289.95
G-sec Volume (Rs Cr)	51305	95075
SDF*	124634	118633
1 Year OIS	5.47%	5.43%
US 10-year Treasury Yield	4.17%	4.14%

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

\*\*Nov 14 and Oct 31 respectively

## Indian Equity

- Indian equity benchmarks closed lower on Monday, due to profit booking amid persistent foreign fund outflows and caution ahead of the US Federal Reserve's policy decision.
- The top losers were InterGlobe Aviation, Bharat Electronics, JSW Steel, Nestle and Shriram Finance, down 2.52-8.62%.
- The top gainers were Tech Mahindra, Wipro and HCL Technologies, up 0.12-1.22%.

## Global Equity

- Wall Street stocks closed lower on Monday as investors were cautious ahead of the Fed's policy decision and rising treasury yields.
- FTSE index closed lower on Monday due to caution ahead of interest rate decisions from the US Federal Reserve and the Bank of England.
- Strait Times Index closed lower on Monday, due to stock-specific losses.
- Nikkei Index closed higher on Monday, due to short covering at lower level amid stable yen.
- Hang Seng Index closed lower on Monday, as investors were cautious ahead of the US Fed's rate decision and China's policy meeting.
- At 8.30 AM, Asian Markets were mostly trading lower.

## Indian Debt

- The interbank call-money rate ended lower at 5.20% on Monday compared to 5.35% on Friday.
- Government bond prices ended lower on Monday after the RBI excluded the liquid 10-year note from its Rs 1 lakh crore OMO plan.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.57% on Monday compared to 6.52% on Friday.

## Capital Market

- EAAA Alternatives plans to raise up to \$1.5 billion (up to Rs 13,500 crore) for medium- to long-term investments in segments such as industrial products and manufacturing, automobiles, chemicals and pharma.
- Frex raised Rs 9.5 crore in a pre-seed funding round jointly led by Zerpearl VC and White Venture Capital.
- ACS Energy raised Rs 1.1 Crore in pre-seed funding from Inflection Point Ventures (IPV).
- AceVector filed its updated draft red herring prospectus (UDRHP) after securing approval from the Securities and Exchange Board of India (Sebi) for its initial public offering (IPO).

## Regulatory

- The government is redesigning the Prasad scheme to boost pilgrim tourism focusing on developing infrastructure at pilgrimage sites.
- The Maharashtra cabinet approved a scheme to construct all-weather motorable approach roads connecting agricultural fields across rural parts of the state.
- The Uttar Pradesh government plans to set up three greenfield hubs for electronics and semiconductors in the hinterland region of the state, in an effort to boost production beyond the Noida-Greater Noida belt.

## Economy and Government

- The RBI issued the final Master Direction on Rupee Interest Rate Derivatives, 2025 after reviewing stakeholder feedback and updating the framework to reflect developments in the IRD market, enhance transparency, and better support system-wide risk-management needs.
- The Securities and Exchange Board of India (Sebi) launched the Past Risk and Return Verification Agency (PaRRVA), a new verification mechanism designed to authenticate past performance claims made by regulated market intermediaries.
- Sebi issued a format for registered entities to report their readiness and compliance with accessibility requirements for each investor-facing digital platform, ensuring these platforms can be effectively used by persons with disabilities.

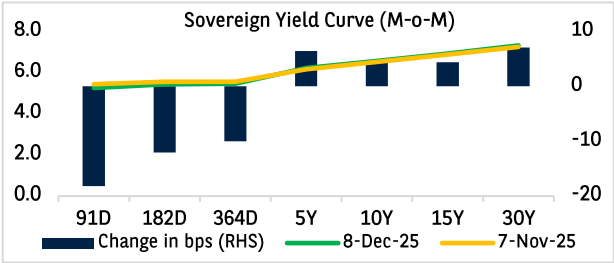
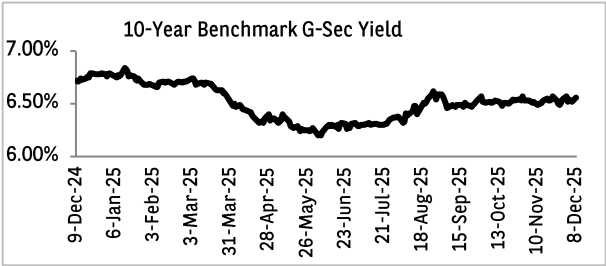
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	2,76,000	401,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.43	6.46	7.19	7.22	8.47	8.95
1-Yr	5.51	6.67	7.40	7.43	8.68	9.16
3-Yr	5.77	6.77	7.50	7.53	8.78	9.26
5-Yr	6.22	6.84	7.66	7.70	8.94	9.42
10-Yr	6.56	7.12	7.94	7.98	9.22	9.70

G-sec and corporate bonds data as of Dec 8

\* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	0.25% (Oct'25)	1.61% (Jul'25)	6.21% (Oct'24)
IIP	0.4% (Oct'25)	4.3% (Jul'25)	3.7% (Oct'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
GST Collection (in Rs cr)	1,70,276 (Nov-25)	1,86,315 (Aug-25)	1,82,269 (Nov-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Dec 8	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	62.49	63.75	66.02	71.12
NYMEX Crude Oil (\$/bbl)	58.88	60.08	62.26	67.2
Gold (Rs / 10 gm)#	128257	128592	108037	76187
# ibjarates spot prices				
Source: Financial Websites, IBJA				

Currencies Vs INR	Dec 8	Dec 5
USD	90.17	89.92
GBP	120.21	120.00
Euro	105.17	104.82
100 Yen	58.08	58.15
Forex Reserve (\$ bn)*	686.23	688.10
Dollar Index	99.05	98.99

\*Data pertains to Nov 28 and to Nov 21 respectively

Source: RBI, Financial Websites

International

- US Consumer Inflation Expectations unchanged at 3.2% in November compared to October 2025.
- UK retail sales rose 1.2% on year November 2025, the slowest pace in six months, from 1.5% in previous month.
- China trade surplus topped a record \$1 trillion in the first 11 months of the year despite a deepening slump in shipments to the US with exports rising 5.4% while imports shrank 0.6%.
- Japan Economy Watchers Survey Outlook decreased to 50.30 in November compared to 53.10 in October 2025.

Commodities

- Crude oil prices fell by \$1.20 to \$58.88 a barrel on the NYMEX after Iraq restored output at a key oilfield and ongoing Russia-Ukraine peace talks.

Baroda BNP Paribas Asset Management India Pvt. Ltd.  
(Formerly BNP Paribas Asset Management India Pvt. Ltd.),  
Registered Office: Crescenzo, 2nd Floor, 201, Awing, G-Block, Bandra Kurla Complex, Mumbai - 400051  
CIN: U74120MH2011PTC225365, Toll Free Number: 1800 - 2670 - 189 | Email: [service@barodabnpparibasmf.in](mailto:service@barodabnpparibasmf.in)

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