

Indian Indices	Mar 9	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77566	-1.71	-8.39	4.35	21.29
Nifty 50	24028	-1.73	-7.01	6.54	21.02
BSE Mid cap	43196	-2.12	-6.27	8.29	NA
Nifty Midcap	56266	-1.97	-5.72	14.38	31.31
Nifty Smallcap	16132	-2.22	-6.46	4.05	28.72
BSE SmallCap	45781	-2.35	-9.53	0.38	NA

Source: BSE, NSE

Indian Indices	Mar 9	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	57504	-3.89	-5.69	22.10
BSE Bankex	62941	-3.16	-5.16	13.40
BSE CD	55844	-2.68	-6.59	3.46
BSE CG	69098	-2.15	3.81	17.29
BSE FMCG	18007	-1.49	-9.95	-4.41
BSE Healthcare	43390	-0.38	-0.74	9.69
BSE IT	29192	-0.09	-20.77	-21.52
BSE Metal	38584	-2.56	15.30	27.66
BSE Oil & Gas	27286	-3.11	-1.34	14.49
BSE Power	6776	-1.39	5.47	10.14
BSE Realty	5697	-1.27	-15.67	-10.03

Source: BSE, NSE

Global Indices	Mar 9	1D % Chg	3M % Chg	1Y % Chg
DJIA	47741	0.50	0.38	11.54
Nasdaq	22696	1.38	-3.73	24.73
FTSE 100	10250	-0.34	6.30	18.08
Nikkei 225	52729	-5.20	4.09	42.95
Hang Seng	25408	-1.35	-0.10	4.86

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 6	MF Inv Mar 5	DII Inv Mar 9
Buy	15134	14336	21586
Sell	21483	11586	12573
Net	-6349	2750	9014
Net (YTD)	-38432	70966	142396

Source: NSDL, NSE

Debt Market Indicators	Mar 9	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.07%	5.15%
10 Yr Gilt^	6.72%	6.69%
91-day T-bill^	5.35%	5.31%
182-day T Bill^	5.54%	5.51%
364-day T Bill^	5.63%	5.60%
3-mth CP rate	7.70%	7.60%
6-mth CP rate	7.60%	7.55%
1-yr CP rate	7.30%	7.27%
3-mth CD rate	7.22%	7.10%
6-mth CD rate	7.20%	7.05%
12-mth CD rate	6.98%	6.94%
5 yr Corp Bond	7.35%	7.28%
Net LAF o/s (Rs Cr)*	-255324	-262090
M3 supply (Rs lakh Cr)**	298.55	299.04
G-sec Volume (Rs Cr)	44000	55910
SDF*	371850	378616
1 Year OIS	5.84%	5.61%
US 10-year Treasury Yield	4.12%	4.15%

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

\*\*Feb 15 and Jan 31 respectively

## Indian Equity

- Indian equity benchmarks closed lower on Monday, dragged down by rising uncertainties in the Middle East that drove up crude oil prices further.
- The top losers were Tata Motors Passenger Vehicles, UltraTech Cement, Maruti Suzuki India, Eicher Motors and Mahindra & Mahindra, down 4.44-5.27%.
- The top gainers were Wipro, Reliance Industries, Apollo Hospitals Enterprise, Infosys and HCL Technologies, up 0.42-1.64%.

## Global Equity

- Wall Street stocks closed higher on Monday as hopes of a resolution to the Iran war, offset inflationary concerns.
- FTSE index closed lower on Monday as surging crude oil prices fuelled inflation fears and raised concerns about potential interest rate hikes amid Middle East tensions.
- Strait Times Index closed lower on Monday owing to a sharp rise in crude oil prices.
- Nikkei Index closed lower on Monday because of a surge in crude oil prices sparking fears of inflation and economic slowdown.
- Hang Seng Index closed lower on Monday as a surge in crude oil prices heightened fears of global stagflation.
- At 8.30 AM, Asian Markets were mostly trading higher.

## Indian Debt

- The interbank call-money rate ended lower at 5.07% on Monday compared to 5.15% on Friday.
- Government bond prices fell on Monday amid rising crude prices and a weaker rupee, heightening inflation concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.72% on Monday compared to 6.69% on Friday.

## Capital Market

- Raymond Realty Ltd has entered a joint venture to develop a housing project in Mumbai with an estimated revenue of about Rs 3,000 crore.
- Puravankara Group signed a joint development agreement for a 4-acre land parcel on Hennur Road in Bengaluru, with an estimated gross development value (GDV) of over Rs 1,300 crore.
- Paras Defence and Space Technologies secured a significant order worth approximately Rs 80.28 crore from the Defence Research and Development Organisation.
- ABB on Monday plans to invest a further \$75 million in India during 2026 to significantly expand its manufacturing footprint and R&D capabilities.

## Regulatory

- The Reserve Bank of India (RBI) injected Rs 50,000 crore into the banking system through Open Market Operation (OMO) purchases of government securities.
- Sebi introduced a voluntary debit freeze facility for mutual fund investors across demat and non-demat folios to promote their digital security.

## Economy and Government

- The Central Information Commission (CIC) has advised the National Financial Reporting Authority (NFRA) to place orders, directions, circulars and policy decisions affecting audit practices and standards in the public domain.
- Manipur Chief Minister Yumnam Khemchand Singh announced that a budgetary provision of Rs. 350 crores is being earmarked in the upcoming budget for assistance to those women who have been affected by recent unrest.
- Finance Minister Nirmala Sitharaman said that the medium-term impact of global crude oil price rise on inflation would depend upon several factors including exchange rate movements, global demand and supply situation, monetary policy transmission, the state of general inflation, and the extent of the indirect pass-through.

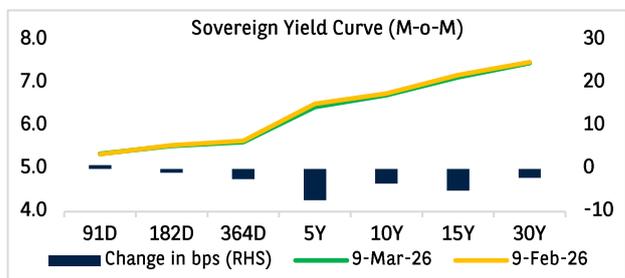
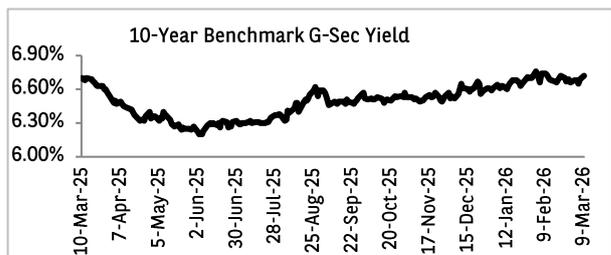
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.54	7.47	8.21	8.26	9.49	9.97
1-Yr	5.66	7.23	7.97	8.02	9.25	9.73
3-Yr	6.13	7.28	8.02	8.07	9.30	9.78
5-Yr	6.44	7.35	8.19	8.24	9.47	9.95
10-Yr	6.72	7.49	8.33	8.38	9.61	10.09

G-sec and corporate bonds data as of Mar 9

\* Weighted average yields; Source: CRISIL



## International

- The Japanese economy advanced at an annualized pace of 1.3% in Q4 2025, compared to a 2.6% contraction in Q3 2025.
- Japan coincident economic index rose to 116.8 in January 2026 compared to 114.3 in December 2025 while the economic index edged up to 112.4 from 110.3.
- Japan Economy Watchers Survey index rose to 48.9 in February 2026 compared to 47.6 in January 2026 while the Economy Watchers Survey Outlook decreased to 50 from 50.10.
- Japan Household spending eased to 1% year-on-year in January 2026, compared to a 2.6% decline in December 2025.

## Commodities

- Crude oil prices rose by \$3.87 to \$94.77 a barrel on the NYMEX as supply cuts by Saudi Arabia and other OPEC members during the expanding war with Iran heightened supply concerns.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
IIP	4.8% (Jan'26)	8.0% (Dec'25)	5.2% (Jan'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)	1,83,609 (Feb-26)	1,93,384 (Nov-25)	1,69,779 (Feb-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Mar 9	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	98.96	92.69	61.94	70.36
NYMEX Crude Oil (\$/bbl)	94.77	90.9	58.25	67.04
Gold (Rs / 10 gm)#	158674	158751	127974	86059

# ibjarates spot prices

Source: Financial Websites, IBI

Currencies Vs INR	Mar 9	Mar 6
USD	92.26	91.68
GBP	122.91	122.49
Euro	106.59	106.41
100 Yen	58.18	58.08
Forex Reserve (\$ bn)*	728.49	723.61
Dollar Index	99.18	98.99

\*Data pertains to Feb 27 and to Feb 20 respectively

Source: RBI, Financial Websites

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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