

Indian Indices	Apr 9	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76632	-1.20	-8.31	3.77	21.06
Nifty 50	23775	-0.93	-7.43	6.14	20.89
BSE Mid cap	43846	0.19	-5.31	10.87	NA
Nifty Midcap	56979	0.32	-4.64	14.92	35.23
Nifty Smallcap	16566	0.17	-4.15	8.58	28.23
BSE SmallCap	47598	0.14	-4.64	7.09	NA

Source: BSE, NSE

Indian Indices	Apr 9	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	57144	-0.37	-8.26	26.58
BSE Bankex	61711	-1.58	-7.36	7.35
BSE CD	56952	-0.53	-7.39	6.40
BSE CG	70579	1.64	7.62	23.14
BSE FMCG	17603	-0.14	-8.26	-11.76
BSE Healthcare	42410	0.74	-2.90	7.20
BSE IT	30419	0.08	-17.33	-5.01
BSE Metal	40357	1.30	10.24	51.62
BSE Oil & Gas	26461	-0.33	-2.95	9.94
BSE Power	7149	1.27	12.43	12.65
BSE Realty	5774	-0.37	-15.18	-4.39

Source: BSE, NSE

Global Indices	Apr 9	1D % Chg	3M % Chg	1Y % Chg
DJIA	48186	0.58	-2.66	18.66
Nasdaq	22822	0.83	-3.59	33.27
FTSE 100	10603	-0.05	4.73	38.08
Nikkei 225	55895	-0.73	7.62	76.25
Hang Seng	25752	-0.54	-1.83	27.08

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Apr 8	MF Inv Apr 7	DII Inv Apr 9
Buy	20152	17088	15968
Sell	21547	11601	15012
Net	-1396	5487	956
Net (YTD)	-175006	171738	279128

Source: NSDL, NSE

Debt Market Indicators	Apr 9	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.10%	4.75%
10 Yr Gilt^	6.96%	6.91%
91-day T-bill^	5.26%	5.29%
182-day T Bill^	5.55%	5.50%
364-day T Bill^	5.59%	5.62%
3-mth CP rate	6.75%	6.90%
6-mth CP rate	7.20%	7.37%
1-yr CP rate	7.35%	7.50%
3-mth CD rate	6.45%	6.50%
6-mth CD rate	6.85%	7.02%
12-mth CD rate	7.00%	7.15%
5 yr Corp Bond	7.60%	7.60%
Net LAF o/s (Rs Cr)*	-466457	-412846
M3 supply (Rs lakh Cr)**	301.93	302.98
G-sec Volume (Rs Cr)	58775	80290
SDF*	577783	524172
1 Year OIS	5.87%	5.85%
US 10-year Treasury Yield	4.29%	4.29%

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

\*\*Mar 15 and Feb 28 respectively

## Indian Equity

- Indian equity benchmarks ended lower on Thursday, on fading hopes of a durable US-Iran ceasefire and renewed instability in West Asia.
- The top losers were InterGlobe Aviation, Jio Financial Services, Larsen & Toubro, Shriram Finance, and Eternal, down 2.47% - 3.61%.
- The top gainers were Hindalco Industries, Bajaj Auto, Bharat Electronics, Dr Reddy's Laboratories, and NTPC, up 1.48% - 3.30%.

## Global Equity

- Wall Street stocks ended higher on Thursday negotiations in Middle East conflicts eased geopolitical concerns.
- FTSE index ended lower on Thursday amid doubts over ceasefire in the Middle East conflict.
- Strait Times Index closed lower on Thursday, as investors stayed cautious despite a temporary ceasefire in West Asia.
- Nikkei Index ended lower on Thursday amid fading euphoria over the fragile ceasefire and renewed escalation in the conflict in West Asia.
- Hang Seng Index closed lower on Thursday on renewed uncertainties in West Asia.
- At 8.30 AM, Asian Markets were mostly trading higher.

## Indian Debt

- The interbank call-money rate ended higher at 5.10% on Thursday compared to 4.75% on Wednesday.
- Government bond prices ended lower on Thursday as doubt over the US-Iran ceasefire and continuing disruptions in the Strait of Hormuz elevated oil price, reviving inflation and currency concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.96% on Thursday compared to 6.90% on Wednesday.

## Capital Market

- CoreWeave entered into an expanded agreement to provide Meta Platforms with \$21 billion in cloud capacity, as the social media giant scales its infrastructure to support increasingly complex AI workloads.
- Adani Renewable Energy Middle East Ltd entered a joint venture agreement with Minerva Holding RSC to develop renewable energy projects in India.
- BHEL signed a technology collaboration agreement (TCA) with South Korea's E2S Company to strengthen its capabilities in excitation systems for synchronous machines.

## Regulatory

- The Reserve Bank of India proposed a series of measures to tackle the sharp rise in digital payment fraud, including a mandatory time lag on certain bank transfers, extra authentication for senior citizens making large transactions, caps on suspicious accounts, and a one-click "kill switch" for customers to instantly freeze all digital payments.
- The Reserve Bank of India (RBI) directed banks to streamline their processes for inward cross-border payments to ensure faster customer notification and timely credit to beneficiaries.

## Economy and Government

- The World Bank said risks to India's projected growth of 6.6% for the fiscal year 2026/27 are skewed to the downside even as ample foreign exchange buffers and a well-capitalised banking system help manage risks.
- The World Bank said India is well placed to weather the current global energy shock with ample buffers, including high foreign exchange reserves, fiscal space and low inflation, which will support growth despite global headwinds.
- Principal Secretary to the Prime Minister Shaktikanta Das said India has consistently shown remarkable resilience during global crises, not only surviving them but also transforming through the turbulence to emerge stronger.

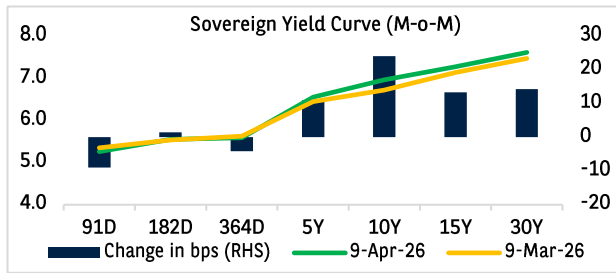
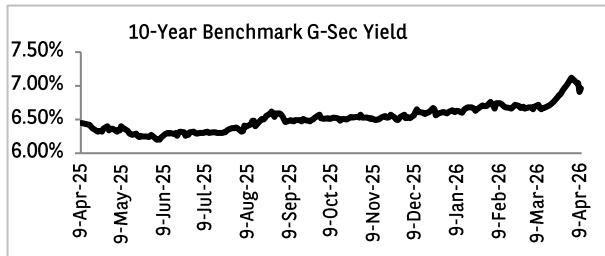
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	29,000	791,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.55	7.12	7.86	7.91	9.14	9.62
1-Yr	5.87	7.42	8.16	8.21	9.44	9.92
3-Yr	6.40	7.44	8.18	8.23	9.46	9.94
5-Yr	6.55	7.60	8.44	8.49	9.72	10.20
10-Yr	6.96	7.67	8.51	8.56	9.79	10.27

G-sec and corporate bonds data as of Apr 9

\* Weighted average yields; Source: CRISIL



## International

- The US economy expanded at an annualized rate of 0.5% in Q4 2025, compared to 4.4% in Q3 2025.
- US PCE price index rose 2.8% year-over-year in February 2026, the same pace as in the previous month.
- US Initial jobless claims rose by 16,000 from the previous week to 219,000 on the period ending April 4th compared to 203,000 in the previous period.
- US PCE Prices increased to 2.9% in the fourth quarter of 2025 compared to 2.8% in the third quarter of 2025.
- China's annual inflation eased to 1.0% in March 2026 from February's over three-year high of 1.3%.
- China's producer prices rose 0.5% year-on-year in March 2026, reversing a 0.9% decline in February.
- Japan's producer prices rose 2.6% yoy in March 2026, quickening from a marginally revised 2.1% increase in the prior month.
- Japan consumer confidence index dropped to 33.3 in March 2026 compared to a downwardly revised 39.7 in February 2026.

## Commodities

- Crude oil prices rose by \$3.46 to \$97.87 a barrel on the NYMEX as market struggles to price path for Hormuz reopening and strikes across Gulf raise supply threats despite ceasefire.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.21% (Feb'26)	0.71% (Nov'25)	3.61% (Feb'25)
IIP	5.2% (Feb'26)	7.2% (Nov'25)	2.7% (Feb'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)	2,00,064 (Mar-26)	1,74,550 (Dec-25)	1,96,141 (Mar-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Apr 9	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	95.92	94.75	63.34	65.48
NYMEX Crude Oil (\$/bbl)	97.87	94.41	59.12	62.35
Gold (Rs / 10 gm)#	149937	151121	137122	90161

# ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Apr 9	Apr 8
USD	92.71	92.56
GBP	124.14	124.30
Euro	108.09	108.20
100 Yen	58.36	58.49
Forex Reserve (\$ bn)*	688.06	698.35
Dollar Index	98.82	99.04

\*Data pertains to Mar 28 and to Mar 20 respectively

Source: RBI, Financial Websites

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