

Indian Indices	Dec 9	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84666	-0.51	4.40	3.87	23.10
Nifty 50	25840	-0.47	3.90	4.96	22.50
BSE Mid cap	46087	0.60	0.85	-3.63	31.68
Nifty Midcap	59676	0.32	3.85	1.15	32.88
Nifty Smallcap	17246	1.14	-2.81	-11.69	31.02
BSE SmallCap	50601	1.27	-4.57	-11.71	31.94

Source: BSE, NSE

Indian Indices	Dec 9	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60973	-0.63	0.55	13.30
BSE Bankex	66365	-0.12	9.54	9.10
BSE CD	59782	-0.16	-3.45	-9.49
BSE CG	66565	1.27	-0.80	-9.56
BSE FMCG	19996	0.15	-3.78	-3.69
BSE Healthcare	43712	-0.05	-1.60	-1.43
BSE IT	36843	-0.89	6.15	-17.52
BSE Metal	33463	-0.34	3.52	5.08
BSE Oil & Gas	27656	-0.01	7.05	1.54
BSE Power	6425	0.68	-1.87	-16.05
BSE Realty	6756	0.94	-0.51	-19.64

Source: BSE, NSE

Global Indices	Dec 9	1D % Chg	3M % Chg	1Y % Chg
DJIA	47560	-0.38	4.04	7.11
Nasdaq	23576	0.13	7.76	19.46
FTSE 100	9642	-0.03	4.32	15.44
Nikkei 225	50655	0.14	16.56	29.35
Hang Seng	25434	-1.29	-1.94	24.59

Source: Financial websites

Rs. Cr (Equity)	FII Inv Dec 8	MF Inv Dec 5	DII Inv Dec 9
Buy	13248	12292	16036
Sell	13335	9672	10689
Net	-87	2621	5347
Net (YTD)	-153086	472763	701311

Source: NSDL, NSE

Debt Market Indicators	Dec 9	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.20%	5.20%
10 Yr Gilt^	6.61%	6.56%
91-day T-bill^	5.25%	5.25%
182-day T Bill^	5.44%	5.43%
364-day T Bill^	5.47%	5.46%
3-mth CP rate	6.41%	6.40%
6-mth CP rate	6.65%	6.65%
1-yr CP rate	6.95%	6.85%
3-mth CD rate	5.95%	5.90%
6-mth CD rate	6.25%	6.23%
12-mth CD rate	6.50%	6.43%
5 yr Corp Bond	6.88%	6.84%
Net LAF o/s (Rs Cr)*	-261976	-224658
M3 supply (Rs lakh Cr)**	289.45	289.95
G-sec Volume (Rs Cr)	51450	51305
SDF*	161952	124634
1 Year OIS	5.48%	5.47%
US 10-year Treasury Yield	4.18%	4.17%

*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 Tuesday, as market participants exercised caution ahead of the US Federal Reserve's policy decision and continuing uncertainty with regard to the India-US trade agreement.
- The top losers were Asian Paints, Tech Mahindra, HCL Technologies, Wipro, and Tata Steel, down 1.52-4.60%.
- The top gainers were Eternal, Titan Company, Adani Enterprises, InterGlobe Aviation and Shriram Finance, up 1.17-2.28%.

Global Equity

- Wall Street stocks closed mixed on Tuesday with Nasdaq gaining due to stock specific gains while Dow Jones declined as investors were cautious ahead of the Federal Reserve policy meeting.
- FTSE index closed flat on Tuesday as strength in precious-metal miners and defence stocks was offset by broader market declines ahead of US Fed policy decision.
- Strait Times Index closed higher on Tuesday on stock-specific gains.
- Nikkei Index ended higher on Tuesday, supported by gains in real estate and banking stocks.
- Hang Seng Index closed lower on Tuesday, on concerns over China's policy direction after economists flagged a lack of urgency in the Politburo readout and caution ahead of US Federal Reserve's policy meeting outcome.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended flat at 5.20% on Tuesday.
- Government bond prices ended lower on Tuesday on heavy overnight index swaps and caution ahead of the Fed decision.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.62% on Tuesday compared to 6.57% on Monday.

Capital Market

- Microsoft will invest \$17.5 billion in India between 2026 and 2029 to advance India's cloud and artificial intelligence (AI) infrastructure, skilling, and ongoing operations.
- JioHotstar aims to invest Rs 4,000 crore for its South content slate over a period of five years.
- Apollo Micro Systems Ltd (AMSL) signed an MoU with the Telangana government to invest Rs 1,500 crore in a greenfield project for defence manufacturing.
- Welspun One plans to develop Grade-A logistics park spread over around 1.2 million square feet in Talegaon, Pune with an investment of Rs 550 crore.

Economy and Government

- Crisil Ratings said RBI's final guidelines on financial services businesses of commercial banks have averted significant restructuring for 12 major bank groups, representing 55% of sectoral advances.
- The government said the New Income Tax return (ITR) forms will be notified ahead of FY28, simplifying the annual financial management exercise.
- The Maharashtra State Election Commission (SEC) on Tuesday announced a revised schedule for the preparation of voter lists for the coming elections to the 29 municipal corporations in the state.
- The Department for Promotion of Industry and Internal Trade (DPIIT) published a working paper proposing the introduction of a mandatory blanket licence for artificial intelligence (AI) developers to use any lawfully accessed copyright-protected material to train their models.
- India and the European Union (EU) held intense discussions here over the last one week as both sides aim to work towards concluding the long-pending trade agreement at the earliest.

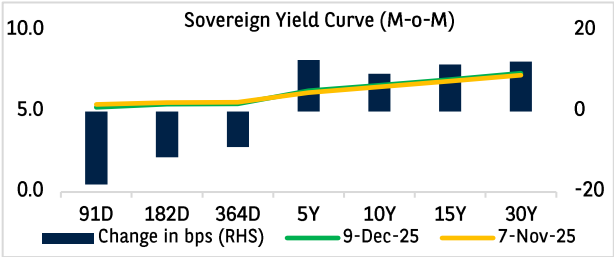
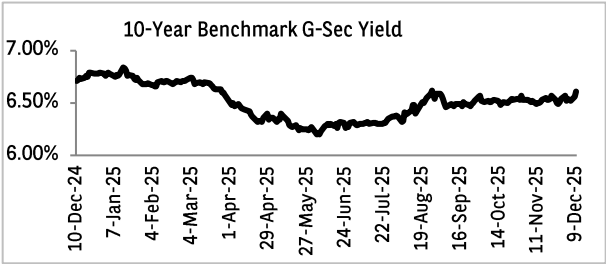
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	244,000	433,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.44	6.52	7.25	7.28	8.53	9.01
1-Yr	5.51	6.71	7.44	7.47	8.72	9.20
3-Yr	5.77	6.81	7.54	7.57	8.82	9.30
5-Yr	6.28	6.88	7.70	7.74	8.98	9.46
10-Yr	6.61	7.16	7.98	8.02	9.26	9.74

G-sec and corporate bonds data as of Dec 9

* 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 9	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	61.94	62.49	66.39	72.14
NYMEX Crude Oil (\$/bbl)	58.25	58.88	62.63	68.37
Gold (Rs / 10 gm)#	127974	128257	109475	76692
# ibjarares spot prices				

Source: Financial Websites, IBIJA

Currencies Vs INR	Dec 9	Dec 8
USD	89.96	90.17
GBP	119.94	120.21
Euro	104.76	105.17
100 Yen	57.66	58.08
Forex Reserve (\$ bn)*	686.23	688.10
Dollar Index	99.22	99.09

*Data pertains to Nov 28 and to Nov 21 respectively

Source: RBI, Financial Websites

International

- US NFIB Small Business Optimism Index rose to 99 in November 2025 compared to 98.2 in October 2025.
- China annual inflation rate accelerated to 0.7% in November 2025 compared to a 0.2% rise in October 2025.
- China producer prices fell -2.2% year-on-year in November 2025, compared to a -2.1% decline in October 2025.
- Japan producer prices rose 2.7% year-on-year in November 2025, unchanged from October 2025.

Commodities

- Crude oil prices fell by 63 cents to \$58.25 a barrel on the NYMEX due to Russia-Ukraine peace talks and ahead of the upcoming US rate decision.

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