

Indian Indices	Feb 10	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84274	0.25	0.88	9.01	23.19
Nifty 50	25935	0.26	1.41	10.92	22.73
BSE Mid cap	46723	0.13	-0.71	10.82	NA
Nifty Midcap	60736	0.49	1.02	15.75	33.47
Nifty Smallcap	17451	0.38	-3.79	4.82	31.26
BSE SmallCap	50470	0.71	-4.59	2.93	NA

Source: BSE, NSE

Indian Indices	Feb 10	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	62554	1.35	4.36	20.53
BSE Bankex	67983	-0.18	4.60	20.02
BSE CD	59197	-0.20	-1.90	2.93
BSE CG	68975	-0.09	-1.78	14.21
BSE FMCG	19155	0.29	-5.82	-3.88
BSE Healthcare	42604	0.07	-4.00	1.00
BSE IT	34516	0.35	-1.29	-17.52
BSE Metal	40292	0.83	16.07	43.12
BSE Oil & Gas	29353	0.51	2.39	20.06
BSE Power	6848	0.34	2.42	12.03
BSE Realty	6612	0.14	-9.83	-5.05

Source: BSE, NSE

Global Indices	Feb 10	1D % Chg	3M % Chg	1Y % Chg
DJIA	50188	0.10	5.95	12.86
Nasdaq	23102	-0.59	-1.81	17.19
FTSE 100	10354	-0.31	5.79	18.09
Nikkei 225	57651	2.28	13.24	48.58
Hang Seng	27183	0.58	2.00	26.30

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 9	MF Inv Feb 6	DII Inv Feb 10
Buy	17750	10457	15263
Sell	14053	12693	14089
Net	3698	-2236	1174
Net (YTD)	-18360	37606	66400

Source: NSDL, NSE

Debt Market Indicators	Feb 10	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.45%	4.40%
10 Yr Gilt^	6.73%	6.76%
91-day T-bill^	5.33%	5.34%
182-day T Bill^	5.55%	5.55%
364-day T Bill^	5.62%	5.65%
3-mth CP rate	7.60%	7.55%
6-mth CP rate	7.65%	7.62%
1-yr CP rate	7.52%	7.47%
3-mth CD rate	7.00%	7.04%
6-mth CD rate	7.12%	7.12%
12-mth CD rate	6.95%	6.98%
5 yr Corp Bond	7.28%	7.28%
Net LAF o/s (Rs Cr)*	-320479	-306984
M3 supply (Rs lakh Cr)**	295.03	298.01
G-sec Volume (Rs Cr)	52210	43305
SDF*	451983	438488
1 Year OIS	5.51%	5.51%
US 10-year Treasury Yield	4.22%	4.22%

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

**Jan 14 and Dec 31 respectively

Indian Equity

- Indian equity benchmarks closed higher on Tuesday, supported by significant gains in automobile and metals stocks.
- The top gainers were, Eternal, Tata Steel, Oil & Natural Gas Corporation, Mahindra & Mahindra, and Bajaj Auto, up 1.79%- 5.19%.
- The top losers were, HCL Technologies, Bajaj Finance, Dr. Reddy's Laboratories, Shriram Finance, and Bharti Airtel, down 1.31%- 2.03%.

Global Equity

- Wall Street stocks closed mixed on Tuesday with Dow Jones gaining as investors rotated into defensive and value stocks while Nasdaq declined due to losses in technology and communication services stocks after weak retail sales data.
- FTSE index closed lower on Tuesday, dragged down by sector specific losses.
- Strait Times Index ended higher on Tuesday on sector-specific gains.
- Nikkei Index closed higher on Tuesday, driven by strong earnings and optimism after PM Sanae Takaichi's election win.
- Hang Seng Index ended higher on Tuesday, boosted by gains in financials and consumer stocks.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended higher at 4.45% on Tuesday compared to 4.40% on Monday.
- Government bond prices rose on Tuesday after strong demand at a state debt auction eased concerns over supply absorption.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.73% on Tuesday compared to 6.76% on Monday.

Capital Market

- Ceigall India secured a 220 MW solar project integrated with battery energy storage system worth Rs 1,700 crore from Rewa Ultra Mega Solar Ltd.
- Crystal Crop Protection acquired 31.06 acres of land and assets from Kurl-On Ltd in Jhagadia, Gujarat, for a greenfield manufacturing project.
- ACME Solar Holdings secured a 220 MW solar project with Battery Energy Storage System (BESS) from Rewa Ultra Mega Solar Ltd (RUMSL).
- PadCare Labs raised \$3 million in a round led by Rainmatter, cofounded by Nithin Kamath.
- Edelweiss Financial Services announced that Carlyle to invest Rs 2,100 crore to acquire a majority stake in its subsidiary, Nido Home Finance.

Regulatory

- The Reserve Bank of India has issued new guidelines for non-banking finance companies, allowing certain NBFCs with assets under Rs 1000 crore and no direct customer interaction to apply for exemption from registration.

Economy and Government

- Union Minister of State Suresh Gopi said that the central government has approved two railway projects that will ease the rail travel woes of people of the state and ensure smoother movement of goods.

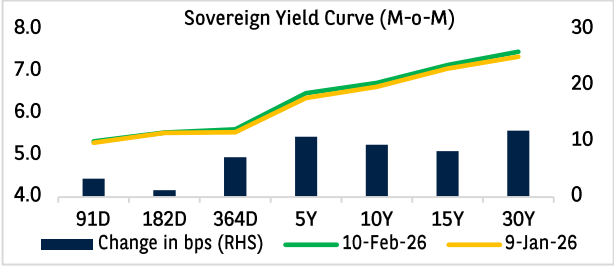
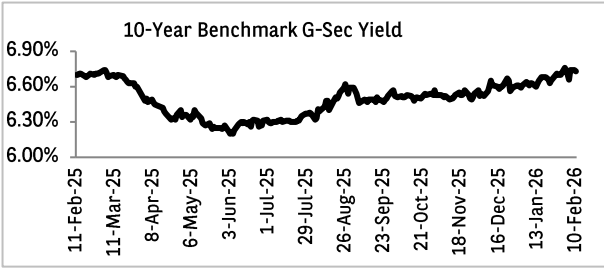
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	552,000	125,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.55	7.37	8.11	8.16	9.39	9.87
1-Yr	5.67	7.12	7.86	7.91	9.14	9.62
3-Yr	5.99	7.22	7.96	8.01	9.24	9.72
5-Yr	6.48	7.28	8.12	8.17	9.40	9.88
10-Yr	6.73	7.44	8.28	8.33	9.56	10.04

G-sec and corporate bonds data as of Feb 10

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	1.33% (Dec-25)	1.44% (Sep'25)	5.22% (Dec'24)
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
GST Collection (In Rs cr)	1,74,550 (Dec-25)	1,89,017 (Sep-25)	1,76,857 (Dec-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Feb 10	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	68.8	69.04	68.8	69.04
NYMEX Crude Oil (\$/bbl)	63.96	64.36	63.96	64.36
Gold (Rs / 10 gm)#	156255	154876	122441	85665

ibjarates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Feb 10	Feb 9
USD	90.58	90.40
GBP	123.86	123.08
Euro	107.87	107.05
100 Yen	58.31	57.77
Forex Reserve (\$ bn)*	723.77	709.41
Dollar Index	96.80	96.82

*Data pertains to Jan 30 and to Jan 23 respectively

Source: RBI, Financial Websites

International

- US Retail Sales increased 2.4% in December 2025, compared to a 3.3% rise in November 2025.
- US NFIB Small Business Optimism Index fell to 99.3 in January 2026 from 99.5 in December 2025.
- US export prices increased 3.1% year-on-year in December 2025, compared to a 3.2% rise in November while import prices were flat at 0.0% after a 0.1% decrease in November.
- China annual inflation eased sharply to 0.2% in January 2026 compared to 0.8% rise in December 2025.
- China producer prices dropped 1.4% year-on-year in January 2026, compared to a 1.9% fall in December 2025.

Commodities

- Crude oil prices fell by 40 cents to \$63.96 a barrel on the NYMEX as investors awaited cues from US-Iran diplomacy, Ukraine war developments and key US economic data.

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