

Indian Indices	May 8	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77328	-0.66	-7.48	-3.74	21.07
Nifty 50	24176	-0.62	-5.91	-0.40	21.00
BSE Mid cap	47516	-0.11	3.49	12.72	NA
Nifty Midcap	61911	-0.15	4.02	16.31	35.83
Nifty Smallcap	18737	0.22	10.32	15.78	31.73
BSE SmallCap	54082	0.12	10.64	15.36	NA

Source: BSE, NSE

Indian Indices	May 8	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59963	-0.28	-2.00	18.06
BSE Bankex	62354	-1.18	-7.69	0.99
BSE CD	60554	2.01	4.91	7.91
BSE CG	80125	-0.24	18.26	29.61
BSE FMCG	18998	0.10	-0.03	-6.47
BSE Healthcare	46535	0.31	10.94	12.71
BSE IT	28585	1.20	-16.79	-18.95
BSE Metal	42744	-0.87	8.61	49.59
BSE Oil & Gas	27414	-1.03	-5.98	4.57
BSE Power	8285	-0.44	21.61	28.64
BSE Realty	6410	-0.17	-0.35	-1.83

Source: BSE, NSE

Global Indices	May 8	1D % Chg	3M % Chg	1Y % Chg
DJIA	49609	0.02	-1.01	19.92
Nasdaq	26247	1.71	13.96	46.40
FTSE 100	10233	-0.43	-1.32	19.94
Nikkei 225	62714	-0.19	15.59	69.82
Hang Seng	26394	-0.87	-0.63	15.88

Source: Financial websites

Rs. Cr (Equity)	FII Inv May 7	MF Inv May 6	DII Inv May 8
Buy	18672	18827	21297
Sell	18692	13042	14549
Net	-20	5785	6748
Net (YTD)	-203936	194203	316012

Source: NSDL, NSE

Debt Market Indicators	May 8	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.20%	5.10%
10 Yr Gilt^	6.98%	6.93%
91-day T-bill^	5.29%	5.29%
182-day T Bill^	5.50%	5.43%
364-day T Bill^	5.63%	5.63%
3-mth CP rate	7.13%	7.13%
6-mth CP rate	7.40%	7.45%
1-yr CP rate	7.77%	7.77%
3-mth CD rate	6.60%	6.57%
6-mth CD rate	6.97%	6.97%
12-mth CD rate	7.35%	7.35%
5 yr Corp Bond	7.68%	7.66%
Net LAF o/s (Rs Cr)*	-245849	-272659
M3 supply (Rs lakh Cr)**	311.59	309.27
G-sec Volume (Rs Cr)	59380	60565
SDF*	256644	272659
1 Year OIS	5.90%	5.87%
US 10-year Treasury Yield	4.38%	4.41%

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

**Data as of Apr 30 and Apr 15 respectively

Indian Equity

- Indian equity benchmarks closed lower on Friday as tensions escalated in the Strait of Hormuz, crude oil prices surged and foreign fund outflows continued unabated.
- The top losers were SBI, Coal India, HDFC Bank, Bajaj Finance and Axis Bank—down 1.76-6.74%.
- The top gainers were Titan, Apollo Hospitals, Asian Paints, Tata Consumer Products and Adani Ports—up 1.57-4.86%.

Global Equity

- Wall Street stocks closed higher on Friday boosted by gains in AI-related stocks and a resilient nonfarm payrolls report.
- FTSE index declined on Friday as investors were cautious due to renewed Gulf tensions raised concerns over the fragile US-Iran ceasefire and weak local election results.
- Strait Times Index ended lower on Friday due to geopolitical tensions and energy concerns.
- Nikkei Index fell on Friday dragged down by a decline in SoftBank Group and worries over rising tensions in West Asia.
- Hang Seng Index fell on Friday amid the renewed hostilities in West Asia, which heightened geopolitical tensions.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended higher at 5.20% on Friday compared to 5.10% on Thursday.
- Government bond prices ended lower on Friday, amid fresh supply and cautious sentiment ahead of the weekend due to ongoing US-Iran tensions.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.98% on Friday compared to 6.93% on Thursday.

Capital Market

- Avi Polymers approved a Rs 500 crore share swap to acquire a 90% stake in JVTR Consultants, aiming to expand into technology and digital services such as IT and software development, aligning with its strategy to diversify and future-proof its business.
- Tata Power and Bhutan's Druk Green Power Corporation are furthering their partnership on at least 4,500 MW of hydropower capacity by developing an additional 404 MW project in Bhutan, building on their November 2024 agreement.
- Dorf-Ketal Chemicals India has acquired the water treatment division of Vasu Chemicals LLP, marking its official entry into India's industrial water treatment sector.

Regulatory

- The Reserve Bank of India (RBI) amended guidelines for including quarterly profits in Common Equity Tier 1 (CET1) capital for CRAR computation.
- The Reserve Bank of India (RBI) and the European Central Bank (ECB) signed a Memorandum of Understanding (MoU) on cooperation in the field of central banking.
- The Securities and Exchange Board of India (SEBI) has proposed an overhaul of the country's buyback framework.

Economy and Government

- According to the Reserve Bank of India, India's foreign exchange reserves declined to \$690.69 billion as of May 1, down from \$698.49 billion the previous week.
- Prime Minister Narendra Modi launched and laid the foundation stone for a series of infrastructure and industrial projects worth nearly Rs 9,400 crore in Telangana.
- India is spearheading BRICS initiatives to improve access to finance and fintech credit solutions for MSMEs, with member countries collaborating to develop strategies that strengthen the competitiveness of MSMEs globally, thereby fostering economic growth and job creation.

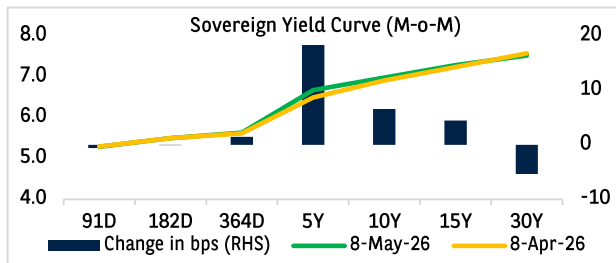
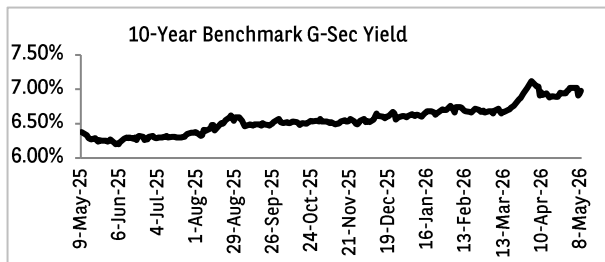
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	190,000	630,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.50	7.14	7.88	7.93	9.16	9.64
1-Yr	5.80	7.47	8.21	8.26	9.49	9.97
3-Yr	6.32	7.62	8.36	8.41	9.64	10.12
5-Yr	6.68	7.68	8.52	8.57	9.80	10.28
10-Yr	6.98	7.71	8.55	8.60	9.83	10.31

G-sec and corporate bonds data as of May 8

* Weighted average yields; Source: CRISIL



International

- The US Nonfarm payroll data came in at 115,000 in April 2026, following an upward revision of 185,000 jobs added in March 2026.
- The US unemployment rate remained steady at 4.3% in April 2026. Despite this, the number of unemployed individuals increased by 134,000 to 7.37 million, and total employment decreased by 226,000 to 162.62 million.
- The US private payrolls increased by 123,000 in April 2026, following an upward revision of 190,000 for March.
- UK Halifax House Price Index for April 2026 indicated a 0.4% year-on-year increase, lower than the 0.8% growth recorded in March.
- China annual inflation rate accelerated to 1.2% in April 2026 compared to 1.0% in March 2026.

Commodities

- Crude oil prices rose by 61 cents to \$95.42 a barrel on the NYMEX after recent airstrikes between the US and Iran raised supply concerns.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.40% (Mar'26)	1.33% (Dec'25)	3.34% (Mar'25)
IIP	4.1% (Mar'26)	8.0% (Dec'25)	3.9% (Mar'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)	2,42,702 (Apr'26)	1,93,384 (Jan'26)	2,36,716 (Apr'25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	May 8	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	101.29	100.06	68.05	62.84
NYMEX Crude Oil (\$/bbl)	95.42	94.81	63.55	59.91
Gold (Rs / 10 gm)#	151078	151149	152078	97030

ibjarares spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	May 8	May 7
USD	94.44	94.78
GBP	128.31	128.85
Euro	110.92	111.35
100 Yen	60.24	60.61
Forex Reserve (\$ bn)*	690.69	698.49
Dollar Index	97.84	98.25

*Data pertains to May 1 and to Apr 24 respectively

Source: RBI, Financial Websites

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