

| Indian Indices | Jan 9 | 1D % Chg | 3M % Chg | 1Y % Chg | PE |
|----------------|-------|----------|----------|----------|-------|
| BSE Sensex | 83576 | -0.72 | 1.71 | 7.67 | 23.06 |
| Nifty 50 | 25683 | -0.75 | 1.99 | 9.17 | 22.36 |
| BSE Mid cap | 46305 | -0.90 | 0.23 | 2.44 | 32.10 |
| Nifty Midcap | 59748 | -0.79 | 2.26 | 7.18 | 33.43 |
| Nifty Smallcap | 17283 | -1.81 | -3.99 | -4.61 | 31.40 |
| BSE SmallCap | 49912 | -1.74 | -5.94 | -7.61 | 31.52 |

Source: BSE, NSE

| Indian Indices | Jan 9 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|-------|----------|----------|----------|
| BSE Auto | 62290 | -1.22 | 4.98 | 18.21 |
| BSE Bankex | 66617 | -0.58 | 5.31 | 18.48 |
| BSE CD | 61498 | -0.48 | 3.95 | -3.32 |
| BSE CG | 65583 | -1.03 | -5.26 | 0.35 |
| BSE FMCG | 19187 | -1.09 | -4.71 | -8.39 |
| BSE Healthcare | 43678 | -1.05 | -1.30 | -2.45 |
| BSE IT | 36795 | 0.03 | 5.17 | -14.41 |
| BSE Metal | 36609 | -0.31 | 6.78 | 30.58 |
| BSE Oil & Gas | 27264 | 0.52 | -0.50 | 4.11 |
| BSE Power | 6359 | -1.79 | -5.78 | -3.99 |
| BSE Realty | 6807 | -2.22 | -0.59 | -12.68 |

Source: BSE, NSE

| Global Indices | Jan 9 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|-------|----------|----------|----------|
| DJIA | 49504 | 0.48 | 6.79 | 16.11 |
| Nasdaq | 23671 | 0.81 | 2.81 | 21.52 |
| FTSE 100 | 10125 | 0.80 | 6.47 | 21.69 |
| Nikkei 225 | 51940 | 1.61 | 6.92 | 31.14 |
| Hang Seng | 26232 | 0.32 | -1.95 | 36.33 |

Source: Financial websites

| Rs. Cr (Equity) | FII Inv Jan 8 | MF Inv Jan 6 | DII Inv Jan 9 |
|-----------------|---------------|--------------|---------------|
| Buy | 11324 | 12912 | 17108 |
| Sell | 15034 | 12068 | 11767 |
| Net | -3710 | 844 | 5341 |
| Net (YTD) | -7221 | 1702 | 16365 |

Source: NSDL, NSE

| Debt Market Indicators | Jan 9 | 1D Ago |
|---------------------------|--------|--------|
| Repo Rate | 5.25% | 5.25% |
| Call Rate | 5.30% | 5.40% |
| 10 Yr Gilt^ | 6.63% | 6.63% |
| 91-day T-bill^ | 5.30% | 5.30% |
| 182-day T Bill^ | 5.53% | 5.49% |
| 364-day T Bill^ | 5.55% | 5.56% |
| 3-mth CP rate | 6.95% | 6.80% |
| 6-mth CP rate | 7.17% | 7.10% |
| 1-yr CP rate | 7.22% | 7.17% |
| 3-mth CD rate | 6.62% | 6.50% |
| 6-mth CD rate | 6.85% | 6.78% |
| 12-mth CD rate | 6.87% | 6.85% |
| 5 yr Corp Bond | 7.21% | 7.21% |
| Net LAF o/s (Rs Cr)* | 5417 | -52714 |
| M3 supply (Rs lakh Cr)** | 290.58 | 291.36 |
| G-sec Volume (Rs Cr) | 40905 | 32840 |
| SDF* | 84707 | 71870 |
| 1 Year OIS | 5.49% | 5.48% |
| US 10-year Treasury Yield | 4.18% | 4.19% |

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

** Dec 15 and Nov 28 respectively

► Indian Equity

- Indian equity benchmarks closed lower on Friday, weighed down by global trade jitters and political uncertainty from Washington.
- The top losers were Adani Enterprises, NTPC, Adani Ports, ICICI Bank and Jio Financial, down 2.04-2.59%.
- The top gainers were Asian Paints, ONGC, HCL Technologies, Bharat Electronics Ltd and Dr Reddys Labs, up 0.50-1.88%.

► Global Equity

- Wall Street stocks closed higher on Friday, boosted by gains in sector specific stocks and softer US jobs report, keeping expectations of Fed rate cuts intact.
- FTSE index closed higher on Friday, buoyed by US jobs data reinforcing expectations of future Federal Reserve rate cuts.
- Strait Times Index ended higher on Friday due to stock-specific gains.
- Nikkei Index closed higher on Friday, lifted by a surge in Fast Retailing after strong earnings as also a weaker yen and eased concerns over China export curbs.
- Hang Seng Index ended higher on Friday, supported by optimism from softer China inflation data.
- At 8.30 AM, Asian Markets were mostly trading higher.

► Indian Debt

- The interbank call-money rate ended lower at 5.30% on Friday compared to 5.40% on Thursday.
- Government bond prices ended lower on Friday pressured by fresh debt supply and weak demand amid quarterly borrowings.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.64% on Friday compared to 6.63% on Thursday.

► Capital Market

- Texmaco Rail & Engineering Ltd secured a purchase order worth Rs 64 crore from APL Logistics Vascor Automotive for manufacture and supply of specialised freight wagons.
- RailTel Corporation plans to establish a greenfield Data Centre for Ethiopia's Ministry of Foreign Affairs, in Addis Ababa.
- Skydo received final authorisation from the Reserve Bank of India (RBI) to become a payment aggregator – cross-border (PA-CB).

► Regulatory

- The Reserve Bank fixed the Ways and Means Advances (WMA) limit for the Delhi government at Rs 890 crore to help it meet any temporary mismatch in receipts and payments.
- Reserve Bank Governor Sanjay Malhotra said financial institutions need to imbibe the spirit of regulations, rather than just "tick-box-based compliance culture", to curb digital frauds.
- The Securities and Exchange Board of India (Sebi) proposed measures to ease doing business and compliance for stock exchanges, as part of a review of its master circulars.

► Economy and Government

- According to data shared by the Reserve Bank of India India's foreign exchange reserves fell by \$9.809 billion to \$686.801 billion in the week ended January 02, 2026.
- Chief Minister Yogi Adityanath and Defence Minister Rajnath Singh, inaugurated Ashok Leyland's new EV manufacturing plant with investments of over Rs 34,000 in UP.
- India and the European Union (EU) on the proposed Free Trade Agreement (FTA) and reaffirmed their commitment to a rules-based trading framework and a modern economic partnership that safeguards the interests of farmers and MSMEs.
- The Punjab government launched fresh auctions for mining sites across the state and notified major reforms to the auction framework under the amended Punjab Minor Mineral Rules.

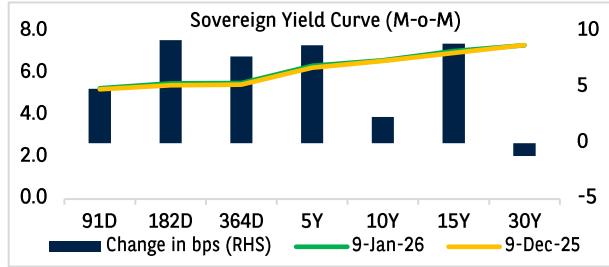
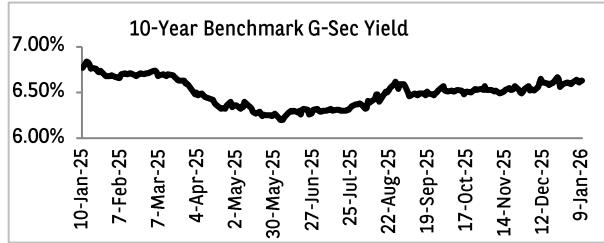
| Borrowing (in Rs cr) | Total | Completed | Balance |
|----------------------|---------|-----------|----------|
| FY 2025 | 677,000 | 427,000 | 2,50,000 |

Source: RBI

| Yields (%) | G-sec* | AAA | AA+ | AA | AA- | A+ |
|------------|--------|------|------|------|------|------|
| 6-mth | 5.53 | 7.08 | 7.82 | 7.87 | 9.10 | 9.58 |
| 1-Yr | 5.64 | 6.98 | 7.72 | 7.77 | 9.00 | 9.48 |
| 3-Yr | 5.91 | 7.00 | 7.74 | 7.79 | 9.02 | 9.50 |
| 5-Yr | 6.37 | 7.21 | 8.05 | 8.10 | 9.33 | 9.81 |
| 10-Yr | 6.63 | 7.33 | 8.17 | 8.22 | 9.45 | 9.93 |

G-sec and corporate bonds data as of Jan 9

* Weighted average yields; Source: CRISIL



Economic Indicators

| YoY (%) | Current | Quarter Ago | Year Ago |
|---------------------------|------------------------|------------------------|------------------------|
| Monthly Inflation (CPI) | 0.71% (Nov'25) | 2.07% (Aug'25) | 5.48% (Nov'24) |
| IIP | 6.7% (Nov'25) | 4.0% (Aug'25) | 5.0% (Nov'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, Mospo, Financial Websites

| Commodity Prices | Jan 9 | 1D Ago | 3M Ago | 1Y Ago |
|---------------------------------|--------|--------|--------|--------|
| London Brent Crude Oil (\$/bbl) | 63.34 | 61.99 | 65.22 | 76.92 |
| NYMEX Crude Oil (\$/bbl) | 59.12 | 57.76 | 61.51 | 73.92 |
| Gold (Rs / 10 gm) # | 137122 | 135773 | 122629 | 77618 |

ibjarates spot prices

Source: Financial Websites, IBA

| Currencies Vs INR | Jan 9 | Jan 8 |
|------------------------|--------|--------|
| USD | 90.14 | 89.89 |
| GBP | 121.02 | 120.97 |
| Euro | 105.01 | 105.00 |
| 100 Yen | 57.26 | 57.42 |
| Forex Reserve (\$ bn)* | 686.80 | 696.61 |
| Dollar Index | 99.13 | 98.93 |

*Data pertains to Jan 2 and to Dec 26 respectively

Source: RBI, Financial Websites

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