

Indian Indices	Feb 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84234	-0.05	0.43	10.41	23.16
Nifty 50	25954	0.07	1.01	12.49	22.74
BSE Mid cap	46770	0.10	-0.81	14.22	NA
Nifty Midcap	60755	0.03	0.54	19.39	33.33
Nifty Smallcap	17455	0.02	-3.57	8.59	31.01
BSE SmallCap	50389	-0.16	-4.66	6.37	NA

Source: BSE, NSE

Indian Indices	Feb 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	63325	1.23	4.60	25.13
BSE Bankex	68096	0.17	4.39	21.54
BSE CD	59374	0.30	-1.73	5.38
BSE CG	68998	0.03	-2.90	17.29
BSE FMCG	19148	-0.04	-6.07	-1.84
BSE Healthcare	43184	1.36	-2.36	5.31
BSE IT	33919	-1.73	-4.03	-17.78
BSE Metal	40449	0.39	15.77	46.95
BSE Oil & Gas	29485	0.45	2.12	22.94
BSE Power	6852	0.05	2.08	14.27
BSE Realty	6650	0.59	-9.14	-1.40

Source: BSE, NSE

Global Indices	Feb 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	50121	-0.13	4.58	12.40
Nasdaq	23066	-0.16	-1.71	17.42
FTSE 100	10472	1.14	5.78	19.31
Nikkei 225	Closed	NA	NA	NA
Hang Seng	27266	0.31	2.14	28.04

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 10	MF Inv Feb 9	DII Inv Feb 11
Buy	17880	10380	14281
Sell	17560	10773	14407
Net	320	-393	-125
Net (YTD)	-18039	37212	66275

Source: NSDL, NSE

Debt Market Indicators	Feb 11	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.65%	4.45%
10 Yr Gilt^	6.71%	6.73%
91-day T-bill^	5.32%	5.33%
182-day T Bill^	5.55%	5.55%
364-day T Bill^	5.59%	5.62%
3-mth CP rate	7.55%	7.60%
6-mth CP rate	7.60%	7.65%
1-yr CP rate	7.45%	7.52%
3-mth CD rate	6.93%	7.00%
6-mth CD rate	7.05%	7.12%
12-mth CD rate	6.92%	6.95%
5 yr Corp Bond	7.26%	7.28%
Net LAF o/s (Rs Cr)*	-345946	-320479
M3 supply (Rs lakh Cr)**	295.03	298.01
G-sec Volume (Rs Cr)	53035	52210
SDF*	477450	451983
1 Year OIS	5.53%	5.51%
US 10-year Treasury Yield	4.18%	4.16%

*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 ended flat on Wednesday, with gains fuelled by optimism over the US-India trade deal countered by a sharp sell-off in IT stocks.
- The top gainers were Eicher Motors, Apollo Hospitals Enterprise, Max Healthcare Institute, State Bank of India and Maruti Suzuki India, up 1.89-6.45%.
- The top losers were Tata Consultancy Services, Infosys, Coal India, HCL Technologies and Tech Mahindra, down 1.19- 2.53%.

► Global Equity

- Wall Street stocks closed lower on Wednesday as stronger than expected non-farm payrolls data raised expectations that the Fed may slow the pace of rate cuts.
- FTSE index closed higher on Wednesday due to gains in homebuilders and energy stocks.
- Strait Times Index ended higher on Wednesday, on the back of stock-specific gains.
- Hang Seng Index rose on Wednesday on flows ahead of the Lunar New Year break.
- At 8.30 AM, Asian Markets were mostly trading lower.

► Indian Debt

- The interbank call-money rate ended higher at 4.65% on Wednesday compared to 4.45% on Tuesday.
- Government bond prices rose on Wednesday as softer US economic data lifted rate cut expectations with focus now on to US non-farm payrolls and India inflation data for cues on policy outlook.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.71% on Wednesday compared to 6.73% on Tuesday.

► Capital Market

- RailTel secured Rs 455 crore Kavach project from Survey, Design, Supply, Installation, Testing and Commissioning of Trackside Kavach Systems across key routes of the Jabalpur Division of West Central Railway.
- V-Guard plans to invest Rs 200 crore to expand its new facility in Kochi, adding to the Rs 120 crore it has already committed.
- Avantel Ltd secured a purchase order valued at Rs 122.58 crore from NewSpace India Limited (NSIL) for supplying S/X-band with Ka-band-ready full motion antennas.
- Nester has secured Rs 19 crore in a pre-Series A funding round, with Fireside Ventures and OTP Ventures leading the investment.
- Rainmatter invested \$2 million in NPS platform Pensionbox to distribute National Pension Scheme products to both retail and corporate clients.
- SteamPRO raised Rs 3.8 crore in seed funding in a round co-led by Anicut Capital, Zeropearl VC, D2C Insider Super Angels and Atrium Ventures, with participation from other strategic angel investors.

► Regulatory

- The Reserve Bank of India (RBI) issued draft amendment directions aimed at strengthening regulations governing the advertising, marketing and sale of financial products and services by regulated entities, including banks and non-banking financial companies (NBFCs).
- SEBI Chairman Tuhin Kanta Pandey expressed concerns over some small and medium enterprises (SMEs) misusing regulatory relaxations, citing instances of fund diversion and market manipulation, while emphasizing the crucial role of SME platforms in capital formation.

► Economy and Government

- The government announced the launch of an Offer for Sale (OFS) in state-run Bharat Heavy Electricals Limited (BHEL) to divest up to a 3 per cent equity stake, with an additional 2 per cent available through a green shoe option.
- The Uttar Pradesh government made provisions for a host of new initiatives across sectors, with an outlay of over Rs 43,565 crore in the Budget for the financial year 2026-27.

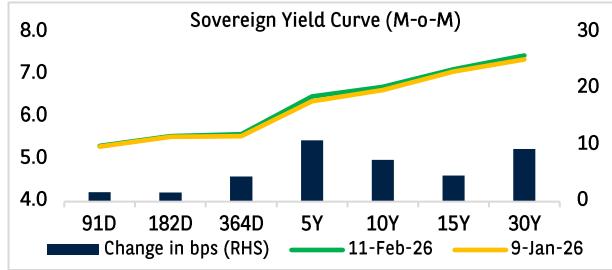
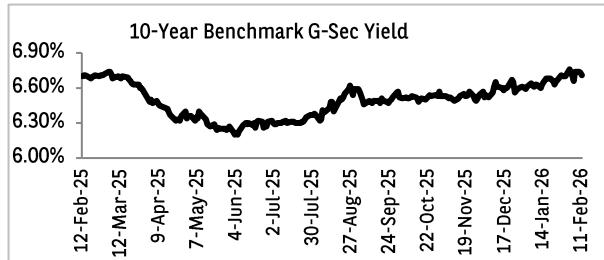
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	552,000	125,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.55	7.25	7.99	8.04	9.27	9.75
1-Yr	5.69	7.09	7.83	7.88	9.11	9.59
3-Yr	5.99	7.21	7.95	8.00	9.23	9.71
5-Yr	6.48	7.26	8.10	8.15	9.38	9.86
10-Yr	6.71	7.42	8.26	8.31	9.54	10.02

G-sec and corporate bonds data as of Feb 11

* 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, Mospo, Financial Websites

Commodity Prices	Feb 11	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Feb 11	Feb 10
London Brent Crude Oil (\$/bbl)	69.4	68.8	65.16	77	USD	90.57	90.58
NYMEX Crude Oil (\$/bbl)	64.63	63.96	61.04	73.32	GBP	123.84	123.86
Gold (Rs / 10 gm) #	157322	156255	124149	85481	Euro	107.96	107.87
# ibjartes spot prices				100 Yen	100 Yen	59.21	58.31
Source: Financial Websites, IBJA				Forex Reserve (\$ bn)*	Forex Reserve (\$ bn)*	723.77	709.41
				Dollar Index	Dollar Index	96.83	96.80

*Data pertains to Jan 30 and to Jan 23 respectively

Source: RBI, Financial Websites

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