

Indian Indices	Mar 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76864	-1.72	-9.38	3.73	21.10
Nifty 50	23867	-1.63	-7.84	6.08	20.88
BSE Mid cap	43470	-0.98	-5.40	9.80	NA
Nifty Midcap	56461	-1.25	-5.23	15.79	31.42
Nifty Smallcap	16415	-0.36	-4.72	8.88	29.25
BSE SmallCap	46624	-0.34	-7.79	5.17	NA

Source: BSE, NSE

Indian Indices	Mar 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	57374	-3.06	-6.77	23.44
BSE Bankex	62709	-2.06	-5.65	13.94
BSE CD	56621	-1.18	-4.62	6.57
BSE CG	69323	-1.04	4.60	19.59
BSE FMCG	18001	-1.04	-10.16	-4.39
BSE Healthcare	43933	0.08	-0.16	11.71
BSE IT	28761	-1.23	-21.93	-21.58
BSE Metal	38982	-0.47	14.59	29.42
BSE Oil & Gas	27355	0.46	-1.04	15.51
BSE Power	6885	0.04	6.69	12.23
BSE Realty	5689	-1.70	-16.12	-11.85

Source: BSE, NSE

Global Indices	Mar 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	47417	-0.61	-2.64	14.44
Nasdaq	22716	0.08	-3.72	30.28
FTSE 100	10354	-0.56	6.71	21.87
Nikkei 225	55025	1.43	9.72	49.55
Hang Seng	25899	-0.24	1.44	8.90

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 10	MF Inv Mar 9	DII Inv Mar 11
Buy	13946	17870	16044
Sell	19446	9521	11079
Net	-5500	8349	4966
Net (YTD)	-50499	83341	153695

Source: NSDL, NSE

Debt Market Indicators	Mar 11	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.75%	4.75%
10 Yr Gilt^	6.65%	6.67%
91-day T-bill^	5.30%	5.34%
182-day T Bill^	5.52%	5.52%
364-day T Bill^	5.61%	5.60%
3-mth CP rate	7.50%	7.65%
6-mth CP rate	7.60%	7.70%
1-yr CP rate	7.30%	7.30%
3-mth CD rate	7.17%	7.17%
6-mth CD rate	7.17%	7.20%
12-mth CD rate	6.98%	6.98%
5 yr Corp Bond	7.31%	7.31%
Net LAF o/s (Rs Cr)*	-281850	-226663
M3 supply (Rs lakh Cr)**	298.55	299.04
G-sec Volume (Rs Cr)	59785	42660
SDF*	398376	343189
1 Year OIS	5.74%	5.72%
US 10-year Treasury Yield	4.21%	4.15%

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

**Feb 15 and Jan 31 respectively

Indian Equity

- Indian equity benchmarks closed lower on Wednesday, pressured by the ongoing uncertainties in the Middle East and foreign fund outflows.
- The top losers were Bajaj Finance, Axis Bank, Bajaj Finserv, Eicher Motors and Mahindra & Mahindra, down 3.51-4.88%.
- The top gainers were Jio Financial Services, Coal India, Sun Pharmaceuticals, Dr Reddy's Laboratories and ONGC, up 0.52-1.06%.

Global Equity

- Wall Street stocks ended mixed on Wednesday with Dow Jones ending lower due to concerns surrounding ongoing geopolitical tensions while Nasdaq rose marginally buoyed by gains in technology stocks.
- FTSE index declined on Wednesday amid persistent worries around geopolitical tensions and disappointing corporate earnings.
- Singapore's Strait Times Index ended marginally higher on Wednesday, supported by lower oil prices as the IEA proposed a record release of strategic oil reserves to mitigate supply disruptions.
- Japan's Nikkei Index closed higher on Wednesday due to easing oil prices and hopes of a potential end to the conflict in the Middle East.
- Hong Kong's Hang Seng Index ended lower on Wednesday, dragged down by losses in technology stocks after Chinese authorities flagged security and data risks linked to the artificial intelligence tool.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended flat at 4.75% on Wednesday.
- Government bond prices rose on Wednesday ahead of a bond purchase by the Central Bank and cooling oil prices.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.64% on Wednesday compared to 6.67% on Tuesday.

Capital Market

- HG Infra Engineering Ltd. received an order worth Rs 401.33 crore from Anuppur Thermal Energy in Anuppur.
- Waaree Renewable Technologies Ltd. signed a contract for the execution of engineering, procurement, and construction (EPC) works for a ground-mounted solar PV plant of 300 MWac / 420 MWp.

Regulatory

- The Reserve Bank of India (RBI) issued revised prudential directions linking dividend payouts by commercial banks to their CET (common equity tier) 1 capital ratios, replacing guidelines issued as recently as November 2025.
- Chairman of the Securities and Exchange Board of India (Sebi) Tuhin Kanta Pandey, called for greater discipline in valuations by alternative investment funds (AIFs), as a growing number of their portfolio companies prepare to tap the public markets.
- The Pension Fund Regulatory and Development Authority (PFRDA) reclassified the National Pension System's Corporate scheme into 'Legal Entities (Other than Government)' and 'Government Entities'.

Economy and Government

- Prime Minister Narendra Modi said the change of name of the state from Kerala to Keralam by the Centre was a joyful moment for "Malayali" brothers.
- Maharashtra Chief Minister Devendra Fadnavis said that the state is on track to become India's first trillion-dollar sub-national economy in the coming years, driven by sustained industrial growth, infrastructure expansion, and increasing technology adoption.
- Union Jal Shakti Minister C R Patil said more than 15 crore rural households in the country are now receiving tap water connections under the Jal Jeevan Mission.
- The Union Cabinet approved the extension and increased financial assistance for the Jal Jeevan Mission (JJM), the government's flagship rural drinking water programme.

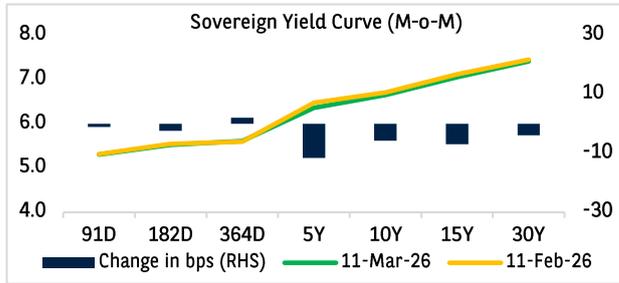
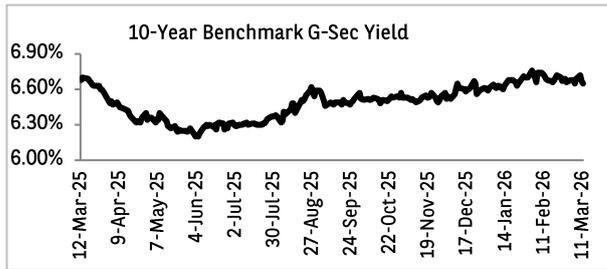
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.52	7.39	8.13	8.18	9.41	9.89
1-Yr	5.69	7.19	7.93	7.98	9.21	9.69
3-Yr	6.06	7.24	7.98	8.03	9.26	9.74
5-Yr	6.36	7.31	8.15	8.20	9.43	9.91
10-Yr	6.65	7.45	8.29	8.34	9.57	10.05

G-sec and corporate bonds data as of Mar 11

* Weighted average yields; Source: CRISIL



International

- US annual inflation rate held steady at 2.4% in February 2026, unchanged compared to January 2026 while the annual core consumer price inflation rate stood at 2.5% in February 2026 unchanged from the previous month.
- China total vehicle sales declined 15.4% year-on-year to 1.801 million units in February 2026, compared to a 3.2% fall in January 2026.

Commodities

- Crude oil prices rose by \$3.80 to \$87.25 a barrel on the NYMEX as fresh attacks on ships in the Strait of Hormuz heightened supply disruption fears.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
IIP	4.8% (Jan'26)	8.0% (Dec'25)	5.2% (Jan'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)	1,83,609 (Feb-26)	1,93,384 (Nov-25)	1,69,779 (Feb-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Mar 11	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	91.98	87.8	61.28	69.56
NYMEX Crude Oil (\$/bbl)	87.25	83.45	57.6	66.25
Gold (Rs / 10 gm)#	160230	160188	128596	86024

ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Mar 11	Mar 10
USD	91.93	92.02
GBP	123.64	123.70
Euro	106.96	107.00
100 Yen	58.21	58.40
Forex Reserve (\$ bn)*	728.49	723.61
Dollar Index	99.38	98.83

*Data pertains to Feb 27 and to Feb 20 respectively

Source: RBI, Financial Websites

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