

| Indian Indices | May 11 | 1D % Chg | 3M % Chg | 1Y % Chg | PE |
|----------------|--------|----------|----------|----------|-------|
| BSE Sensex | 76015 | -1.70 | -9.76 | -4.33 | 20.56 |
| Nifty 50 | 23816 | -1.49 | -8.24 | -0.80 | 20.68 |
| BSE Mid cap | 46906 | -1.28 | 0.29 | 11.39 | NA |
| Nifty Midcap | 61258 | -1.05 | 2.93 | 15.10 | 35.11 |
| Nifty Smallcap | 18526 | -1.13 | 9.08 | 15.17 | 31.00 |
| BSE SmallCap | 53512 | -1.05 | 6.20 | 14.48 | NA |

Source: BSE, NSE

| Indian Indices | May 11 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| BSE Auto | 58913 | -1.75 | -6.97 | 16.21 |
| BSE Bankex | 61375 | -1.57 | -9.87 | 0.45 |
| BSE CD | 58280 | -3.76 | -1.84 | 2.53 |
| BSE CG | 78453 | -2.09 | 13.70 | 24.82 |
| BSE FMCG | 18972 | -0.13 | -0.92 | -5.99 |
| BSE Healthcare | 46818 | 0.61 | 8.42 | 13.57 |
| BSE IT | 28534 | -0.18 | -15.88 | -18.83 |
| BSE Metal | 42197 | -1.28 | 4.32 | 47.43 |
| BSE Oil & Gas | 26876 | -1.96 | -8.85 | 3.00 |
| BSE Power | 8108 | -2.13 | 18.35 | 27.32 |
| BSE Realty | 6235 | -2.74 | -6.25 | -2.49 |

Source: BSE, NSE

| Global Indices | May 11 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| DJIA | 49704 | 0.19 | -0.83 | 20.50 |
| Nasdaq | 26274 | 0.10 | 13.91 | 46.55 |
| FTSE 100 | 10269 | 0.36 | -1.94 | 20.04 |
| Nikkei 225 | 62418 | -0.47 | 8.27 | 66.43 |
| Hang Seng | 26407 | 0.05 | -3.15 | 15.48 |

Source: Financial websites

| Rs. Cr (Equity) | Fill Inv May 8 | MF Inv May 7 | DII Inv May 11 |
|-----------------|----------------|--------------|----------------|
| Buy | 15413 | 13918 | 21626 |
| Sell | 16794 | 13552 | 15687 |
| Net | -1381 | 366 | 5940 |
| Net (YTD) | -205317 | 194569 | 321952 |

Source: NSDL, NSE

| Debt Market Indicators | May 11 | 1D Ago |
|---------------------------|---------|---------|
| Repo Rate | 5.25% | 5.25% |
| Call Rate | 4.75% | 5.20% |
| 10 Yr Gilt^ | 7.04% | 6.98% |
| 91-day T-bill^ | 5.30% | 5.29% |
| 182-day T Bill^ | 5.50% | 5.50% |
| 364-day T Bill^ | 5.64% | 5.63% |
| 3-mth CP rate | 7.25% | 7.13% |
| 6-mth CP rate | 7.43% | 7.40% |
| 1-yr CP rate | 7.85% | 7.77% |
| 3-mth CD rate | 6.60% | 6.60% |
| 6-mth CD rate | 7.00% | 6.97% |
| 12-mth CD rate | 7.45% | 7.35% |
| 5 yr Corp Bond | 7.72% | 7.68% |
| Net LAF o/s (Rs Cr)* | -233321 | -223510 |
| M3 supply (Rs lakh Cr)** | 311.59 | 309.27 |
| G-sec Volume (Rs Cr) | 50025 | 59380 |
| SDF* | 244116 | 234305 |
| 1 Year OIS | 5.96% | 5.90% |
| US 10-year Treasury Yield | 4.42% | 4.38% |

*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 ended lower on Monday, after Prime Minister Narendra Modi called for measures to mitigate the economic impact of rising energy costs, as oil prices climbed amid declining prospects of a peace agreement in West Asia.
- The top losers were Titan Company, InterGlobe Aviation, State Bank of India, Eternal and Jio Financial Services, down 3.81-6.85%.
- The top gainers were Tata Consumer Products, Max Healthcare Institute, Coal India, Sun Pharmaceutical Industries and Hindustan Unilever, up 0.97-8.05%.

Global Equity

- Wall Street stocks closed higher on Monday boosted by continued optimism around AI-related stocks, despite volatile oil prices and stalled US-Iran talk, which kept inflation concerns in focus.
- FTSE index closed higher on Monday driven by gains in mining stocks and a surge in shares of Airtel Africa.
- Strait Times Index ended higher on Monday, due to stock-specific gains.
- Nikkei Index ended lower on Monday, as concerns over the West Asia conflict and rising crude oil prices outweighed optimism surrounding corporate earnings and technology investment.
- Hang Seng Index ended higher on Monday, buoyed by a strong rally in the technology sector fuelled by renewed optimism about artificial intelligence, and robust export data.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended lower at 4.75% on Monday compared to 5.20% on Friday.
- Government bond prices ended lower on Monday, as stalled US-Iran peace talks drove oil prices higher, raising inflation and fiscal stability concerns ahead of April inflation data.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.04% on Monday compared to 6.98% on Friday.

Capital Market

- Afcons Infrastructure emerged as the L1 bidder for the reconstruction of an existing railway track and the construction of a second-track railway line in Europe worth Rs 7,544 crore.
- HFCL secured export orders worth around \$19.32 million for the supply of optical fiber cables from renowned international customers.
- HG Infra Engineering received a Letter of Award worth Rs 3,931.11 crore from Welspun Enterprises, Maharashtra, for the construction of a six-lane highway corridor along with the improvement of an existing road.

Regulatory

- SEBI proposed a new green-channel mechanism, GARUDA, for alternative investment funds (AIFs) to launch schemes to 10 working days of filing their placement memorandums from the current 30 days, in a bid to speed up the deployment of capital by them.

Economy and Government

- Periodic Labour Force Survey (PLFS) data released by the government, India's urban unemployment rate for persons aged 15 years and above eased to 6.6% in the January-March 2026 quarter from 6.7% in the previous quarter.
- MOSPI Secretary Saurabh Garg said that India's creative economy, now an integral part of the services sector, requires dedicated measurement and formalisation to drive future growth, highlighting that digital and creative segments are among the fastest-growing and have become central to economic expansion, on par with agriculture and manufacturing.
- Prime Minister Narendra Modi urged citizens to conserve foreign exchange amid rising oil prices, which are straining the rupee and depleting reserves.

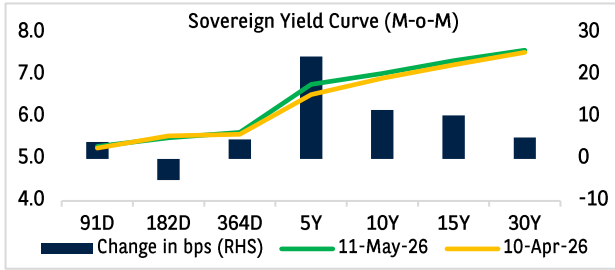
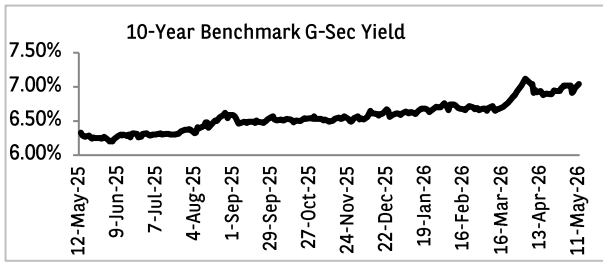
| Borrowing (in Rs cr) | Total | Completed | Balance |
|----------------------|---------|-----------|---------|
| FY 2025 | 820,000 | 190,000 | 630,000 |

Source: RBI

| Yields (%) | G-sec* | AAA | AA+ | AA | AA- | A+ |
|------------|--------|------|------|------|------|-------|
| 6-mth | 5.50 | 7.17 | 7.91 | 7.96 | 9.19 | 9.67 |
| 1-Yr | 5.87 | 7.55 | 8.29 | 8.34 | 9.57 | 10.05 |
| 3-Yr | 6.39 | 7.66 | 8.40 | 8.45 | 9.68 | 10.16 |
| 5-Yr | 6.78 | 7.72 | 8.56 | 8.61 | 9.84 | 10.32 |
| 10-Yr | 7.04 | 7.75 | 8.59 | 8.64 | 9.87 | 10.35 |

G-sec and corporate bonds data as of May 11

* Weighted average yields; Source: CRISIL



International

- US existing home sales increased 0.2% on month to an annualized rate of 4.02 million in April of 2026, following a revised 2.9% plunge in March.
- China's producer prices rose 2.8% on year in April 2026, picking up from a 0.5% gain in the prior month.
- Japan Household spending declined 2.9% in March 2026, compared to a 1.8% drop in February 2026.

Commodities

- Crude oil prices rose by \$2.65 to \$98.07 a barrel on the NYMEX as ceasefire concerns resurfaced after the US President signaled rising tensions, increasing fears of supply disruptions through Strait of Hormuz.

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 11 | 1D Ago | 3M Ago | 1Y Ago |
|---------------------------------|--------|--------|--------|--------|
| London Brent Crude Oil (\$/bbl) | 104.21 | 101.29 | 69.4 | 63.91 |
| NYMEX Crude Oil (\$/bbl) | 98.07 | 95.42 | 64.63 | 61.02 |
| Gold (Rs / 10 gm)# | 150362 | 151078 | 157322 | 96416 |

ibjarrates spot prices

Source: Financial Websites, IBJA

| Currencies Vs INR | May 11 | May 8 |
|------------------------|--------|--------|
| USD | 95.20 | 94.44 |
| GBP | 129.38 | 128.31 |
| Euro | 111.93 | 110.92 |
| 100 Yen | 60.60 | 60.24 |
| Forex Reserve (\$ bn)* | 690.69 | 698.49 |
| Dollar Index | 97.94 | 97.84 |

*Data pertains to May 1 and to Apr 24 respectively

Source: RBI, Financial Websites

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