

Indian Indices	Feb 12	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83675	-0.66	-0.94	9.85	22.96
Nifty 50	25807	-0.57	-0.27	11.98	22.58
BSE Mid cap	46484	-0.61	-1.85	14.04	NA
Nifty Midcap	60471	-0.47	-0.71	19.14	33.16
Nifty Smallcap	17344	-0.64	-4.97	8.18	30.84
BSE SmallCap	50069	-0.63	-5.98	6.22	NA

Source: BSE, NSE

Indian Indices	Feb 12	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	63185	-0.22	3.18	25.90
BSE Bankex	68067	-0.04	4.14	21.16
BSE CD	59754	0.64	-2.91	6.18
BSE CG	69045	0.07	-2.98	17.18
BSE FMCG	19065	-0.43	-6.62	-1.96
BSE Healthcare	43088	-0.22	-3.31	5.56
BSE IT	32123	-5.29	-10.84	-21.63
BSE Metal	40423	-0.06	15.71	45.87
BSE Oil & Gas	29136	-1.18	0.20	22.25
BSE Power	6840	-0.17	1.91	14.54
BSE Realty	6551	-1.50	-10.06	-0.31

Source: BSE, NSE

Global Indices	Feb 12	1D % Chg	3M % Chg	1Y % Chg
DJIA	49452	-1.34	2.48	11.46
Nasdaq	22597	-2.03	-3.46	15.00
FTSE 100	10402	-0.67	4.95	18.11
Nikkei 225	57640	-0.02	12.88	47.93
Hang Seng	27033	-0.86	0.41	23.67

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 11	MF Inv Feb 9	DII Inv Feb 12
Buy	19373	10380	17214
Sell	16260	10773	16937
Net	3113	-393	277
Net (YTD)	-14926	37212	66551

Source: NSDL, NSE

Debt Market Indicators	Feb 12	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.60%	4.65%
10 Yr Gilt^	6.69%	6.71%
91-day T-bill^	5.28%	5.32%
182-day T Bill^	5.52%	5.55%
364-day T Bill^	5.55%	5.59%
3-mth CP rate	7.45%	7.55%
6-mth CP rate	7.50%	7.60%
1-yr CP rate	7.35%	7.45%
3-mth CD rate	6.85%	6.93%
6-mth CD rate	6.99%	7.05%
12-mth CD rate	6.90%	6.92%
5 yr Corp Bond	7.23%	7.26%
Net LAF o/s (Rs Cr)*	-294605	-345946
M3 supply (Rs lakh Cr)**	295.03	298.01
G-sec Volume (Rs Cr)	72110	53035
SDF*	424012	477450
1 Year OIS	5.50%	5.53%
US 10-year Treasury Yield	4.09%	4.18%

*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 closed lower on Thursday, amid robust jobs data from the United States reducing expectations of imminent interest rate cuts.
- The top losers were Tech Mahindra, Infosys, Tata Consultancy Services, HCL Technologies and Wipro, down 4.79%- 6.40%.
- The top gainers were Bajaj Finance, Shriram Finance, Eicher Motors, ICICI Bank and Bharat Electronics, up 1.47%- 3.31%.

► Global Equity

- Wall Street stocks closed lower on Thursday, dragged down by transport and technology stocks over AI disruption concerns.
- FTSE index closed lower on Thursday led by profit booking due to global risk-off sentiment.
- Strait Times Index ended higher on Thursday because of stock-specific gains.
- Nikkei Index closed flat on Thursday, with gains driven by strong US payrolls data and optimism following the election win offset due to profit-booking.
- Hang Seng Index closed lower on Thursday, dragged down by technology stocks after China's market regulator summoned major online platforms over ticketing irregularities.
- At 8.30 AM, Asian Markets were mostly trading lower.

► Indian Debt

- The interbank call-money rate ended lower at 4.60% on Thursday compared to 4.65% on Wednesday.
- Government bond prices rose on Thursday after lower-than-expected January inflation triggered short-covering.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.68% on Thursday compared to 6.71% on Wednesday.

► Capital Market

- Ceigall Infra Projects received a Letter of Award (LoA) from the National Highways Authority of India (NHAI) for the construction of a four-lane highway project in Bihar worth Rs 2,160 crore under the Hybrid Annuity Mode (HAM).
- USV plans to acquire a 79% stake in Wellbeing Nutrition at a valuation of Rs 1,583 crore.
- Experion Developers plans to invest Rs 1,500 crore to develop a housing project in Noida to expand its business.
- Hartek secured new orders worth Rs 735 crore through its power systems business unit.
- Regtech startup Idfy secured Rs 476 crore from Neo Asset Management and existing investors.
- Mahindra & Mahindra plans to invest around Rs 196 crore to expand its Chennai-based research and development facility.

► Regulatory

- The Securities and Exchange Board of India (Sebi) plans to reduce regulatory costs and compliance burden to enhance the competitiveness of the securities market.
- The Insurance Regulatory and Development Authority of India (Irdai) has granted insurers greater flexibility in investing in Alternative Investment Funds (AIFs).

► Economy and Government

- India's retail inflation rose to 2.75% in January 2026 compared to 1.33% in December 2025 on higher food and precious metal prices.
- The Ministry of Defence has entered into an agreement with Hindustan Aeronautics Limited (HAL) to procure eight Dornier 228 aircraft, along with necessary operational equipment, for the Indian Coast Guard at a total cost of Rs 2,312 crore, under the 'Buy (Indian)' category.
- Mozambique has launched a new digital e-Visa system, allowing travellers from 183 countries, including India, to apply online.

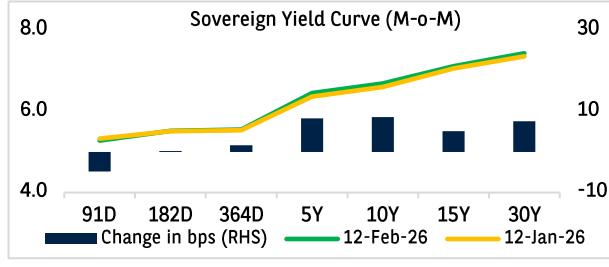
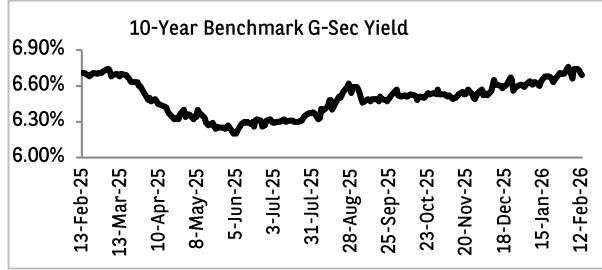
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	552,000	125,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.52	7.20	7.94	7.99	9.22	9.70
1-Yr	5.73	7.01	7.75	7.80	9.03	9.51
3-Yr	5.98	7.16	7.90	7.95	9.18	9.66
5-Yr	6.45	7.23	8.07	8.12	9.35	9.83
10-Yr	6.69	7.39	8.23	8.28	9.51	9.99

G-sec and corporate bonds data as of Feb 12

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI) (Jan'26)	2.75%	0.25%	4.26%
IIP (Dec'25)	7.8%	4.6%	3.7%
GDP (Jul-Sep FY26)	8.2%	7.8%	5.6%
GST Collection (in Rs cr) (Dec-25)	1,74,550	1,89,017	1,76,857

Source: CRISIL, Mospo, Financial Websites

Commodity Prices	Feb 12	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Feb 12	Feb 11
London Brent Crude Oil (\$/bbl)	67.52	69.4	62.71	75.18	USD	90.59	90.57
NYMEX Crude Oil (\$/bbl)	62.84	64.63	58.49	71.37	GBP	123.36	123.84
Gold (Rs / 10 gm) #	155650	157322	123913	84845	Euro	107.45	107.96
# ibjartes spot prices				100 Yen	100 Yen	59.10	59.21
Source: Financial Websites, IBJA				Forex Reserve (\$ bn)*	Forex Reserve (\$ bn)*	723.77	709.41
				Dollar Index	Dollar Index	96.97	96.83

*Data pertains to Jan 30 and to Jan 23 respectively

Source: RBI, Financial Websites

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