

Indian Indices	Apr 10	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	77550	1.20	-7.21	5.01	21.31
Nifty 50	24051	1.16	-6.36	7.37	21.13
BSE Mid cap	44566	1.64	-3.75	12.69	NA
Nifty Midcap	57844	1.52	-3.19	16.66	35.76
Nifty Smallcap	16840	1.65	-2.56	10.38	28.70
BSE SmallCap	48445	1.78	-2.94	9.00	NA

Source: BSE, NSE

Indian Indices	Apr 10	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58714	2.75	-5.74	30.06
BSE Bankex	62985	2.06	-5.45	9.56
BSE CD	58203	2.20	-5.36	8.74
BSE CG	72181	2.27	10.06	25.94
BSE FMCG	17831	1.30	-7.07	-10.61
BSE Healthcare	42619	0.49	-2.42	7.73
BSE IT	29902	-1.70	-18.73	-6.62
BSE Metal	40765	1.01	11.35	53.15
BSE Oil & Gas	26681	0.83	-2.14	10.86
BSE Power	7287	1.92	14.59	14.81
BSE Realty	5890	2.02	-13.47	-2.46

Source: BSE, NSE

Global Indices	Apr 10	1D % Chg	3M % Chg	1Y % Chg
DJIA	47917	-0.56	-3.21	21.02
Nasdaq	22903	0.35	-3.25	39.76
FTSE 100	10601	-0.03	4.70	33.96
Nikkei 225	56924	1.84	9.60	64.48
Hang Seng	25894	0.55	-1.29	25.20

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Apr 9	MF Inv Apr 7	DII Inv Apr 10
Buy	16522	17088	15982
Sell	18586	11601	15572
Net	-2064	5487	410
Net (YTD)	-177070	171738	279538

Source: NSDL, NSE

Debt Market Indicators	Apr 10	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.75%	5.10%
10 Yr Gilt^	6.92%	6.96%
91-day T-bill^	5.26%	5.26%
182-day T Bill^	5.55%	5.55%
364-day T Bill^	5.59%	5.59%
3-mth CP rate	6.51%	6.75%
6-mth CP rate	7.15%	7.20%
1-yr CP rate	7.35%	7.35%
3-mth CD rate	6.15%	6.45%
6-mth CD rate	6.80%	6.85%
12-mth CD rate	7.00%	7.00%
5 yr Corp Bond	7.60%	7.60%
Net LAF o/s (Rs Cr)*	-463536	-466457
M3 supply (Rs lakh Cr)**	301.93	302.98
G-sec Volume (Rs Cr)	83460	58775
SDF*	559722	577783
1 Year OIS	5.83%	5.87%
US 10-year Treasury Yield	4.31%	4.29%

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

\*\*Mar 15 and Feb 28 respectively

## Indian Equity

- Indian equity benchmarks closed higher on Friday, driven by gains in financial and auto stocks amid easing geopolitical concerns and moderating oil prices.
- The top gainers were Asian Paints, Eicher Motors, Bajaj Auto, ICICI Bank and Mahindra & Mahindra, up 3.13-3.81%.
- The top losers were Coal India, Sun Pharmaceuticals, Infosys, TCS and Tech Mahindra, down, 1.55-4.14%.

## Global Equity

- Wall Street stocks closed mixed on Friday with Dow Jones declining due to losses in energy and industrial stocks while Nasdaq gained on strength in tech stocks and resilient growth expectations.
- FTSE index closed flat on Friday as investors stayed cautious ahead of peace talks despite a ceasefire decision between US-Iran.
- Strait Times Index closed higher on Friday, driven by gains in banking stocks.
- Nikkei Index closed higher on Friday, as strong corporate earnings and tech investment optimism outweighed geopolitical concerns.
- Hang Seng Index closed higher on Friday, boosted by domestic inflation data that indicated an end to prolonged industrial deflation.
- At 8.30 AM, Asian Markets were mostly trading lower.

## Indian Debt

- The interbank call-money rate ended lower at 4.75% on Friday compared to 5.10% on Thursday.
- Government bond prices ended higher on Friday as a US-Iran truce cooled oil prices and a neutral RBI stance.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.91% on Friday compared to 6.96% on Thursday.

## Capital Market

- Enviro Infra Engineers received two projects worth Rs 972.2 crore from the Swachh Maharashtra Mission Directorate.
- Advait Energy Transitions received bid confirmation at the L1 stage as the successful bidder for a turnkey contract under the Vanbandhu Kalyan Yojana-2 (VKY-2) scheme.

## Regulatory

- The Reserve Bank proposed changes in the criteria for identifying upper layer non-banking finance companies (NBFCs), pitching for an asset-size-based approach as against the earlier parametric system and inclusion of state-run entities.
- The Reserve Bank of India (RBI) proposed to introduce delays in high-value digital transactions as part of wider measures to combat rising fraud.
- The Reserve Bank of India to conduct a variable rate reverse repo auction for Rs 2 trillion (\$21.58 billion), its first such operation in four months.
- The Securities and Exchange Board of India eased AIF closure rules, allowing funds to retain liquidation proceeds under conditions as Rs 180 crore remains locked due to litigation, tax and operational issues.

## Economy and Government

- According to data released by the Reserve Bank of India, India Foreign Exchange Reserves increased to \$697.12 billion in April 3 compared to \$688.06 billion in the previous week.
- India's economic growth forecast for FY27 has been raised to 6.9% by the Asian Development Bank.
- According to a report by Crisil Intelligence power demand in the country is expected to rise by around 6% in the current financial year, driven by the anticipated impact of El Nino conditions, which are likely to increase temperatures and reduce rainfall.
- The government approved 52 new applications under the third round of the Production Linked Incentive (PLI) Scheme for textiles.

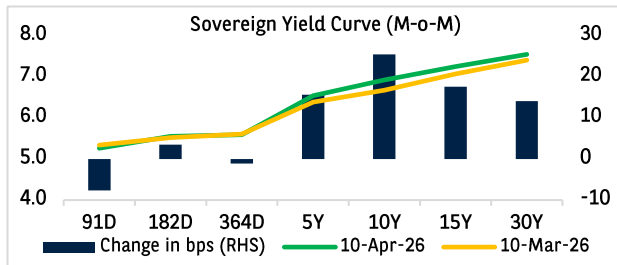
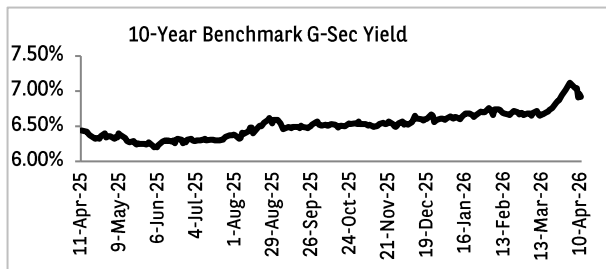
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	63,000	757,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.55	7.07	7.81	7.86	9.09	9.57
1-Yr	5.86	7.37	8.11	8.16	9.39	9.87
3-Yr	6.35	7.44	8.18	8.23	9.46	9.94
5-Yr	6.53	7.60	8.44	8.49	9.72	10.20
10-Yr	6.92	7.67	8.51	8.56	9.79	10.27

G-sec and corporate bonds data as of Apr 10

\* Weighted average yields; Source: CRISIL



## International

- US annual inflation rate jumped to 3.3% in March 2026, compared to 2.4% in both February and January 2026 while the annual core inflation rate rose to 2.6% from 2.5%.
- According to a report by S&P Global global economic growth is expected to slow to 3.2% in calendar year 2026 from 3.4% in the previous year, as the ongoing West Asia conflict triggers what is being described as the largest energy shock on record.

## Commodities

- Crude oil prices fell by \$1.30 to \$96.57 a barrel on the NYMEX as a US-Iran ceasefire and upcoming talks for a permanent deal eased supply fears.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.21% (Feb'26)	0.71% (Nov'25)	3.61% (Feb'25)
IIP	5.2% (Feb'26)	7.2% (Nov'25)	2.7% (Feb'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)	2,00,064 (Mar-26)	1,74,550 (Dec-25)	1,96,141 (Mar-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Apr 10	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	95.2	95.92	63.34	63.33
NYMEX Crude Oil (\$/bbl)	96.57	97.87	59.12	60.07
Gold (Rs / 10 gm)#	150327	149937	137122	90161

# ibjbrates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Apr 10	Apr 9
USD	92.65	92.71
GBP	124.31	124.14
Euro	108.28	108.09
100 Yen	58.16	58.36
Forex Reserve (\$ bn)*	697.12	688.06
Dollar Index	98.65	98.82

\*Data pertains to Apr 3 and to Mar 27 respectively

Source: RBI, Financial Websites

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