

Indian Indices	May 12	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74559	-1.92	-10.89	-9.55	20.17
Nifty 50	23380	-1.83	-9.41	-6.20	20.30
BSE Mid cap	45689	-2.60	-1.71	4.48	NA
Nifty Midcap	59705	-2.54	0.32	7.74	34.15
Nifty Smallcap	17939	-3.17	5.62	6.99	30.01
BSE SmallCap	51883	-3.04	3.62	6.55	NA

Source: BSE, NSE

Indian Indices	May 12	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	57556	-2.30	-8.91	9.82
BSE Bankex	60333	-1.70	-11.36	-4.44
BSE CD	56329	-3.35	-5.73	-3.62
BSE CG	76217	-2.85	10.39	16.76
BSE FMCG	18662	-1.64	-2.12	-9.99
BSE Healthcare	46069	-1.60	6.92	10.74
BSE IT	27486	-3.67	-14.44	-26.76
BSE Metal	41995	-0.48	3.89	39.42
BSE Oil & Gas	26872	-0.02	-7.77	0.11
BSE Power	7896	-2.61	15.45	18.29
BSE Realty	5972	-4.22	-8.83	-11.78

Source: BSE, NSE

Global Indices	May 12	1D % Chg	3M % Chg	1Y % Chg
DJIA	49761	0.11	0.62	17.33
Nasdaq	26088	-0.71	15.45	39.45
FTSE 100	10265	-0.04	-1.32	19.30
Nikkei 225	62743	0.52	8.85	66.67
Hang Seng	26348	-0.22	-2.53	11.88

Source: Financial websites

Rs. Cr (Equity)	FII Inv May 11	MF Inv May 8	DII Inv May 12
Buy	13053	16953	20685
Sell	20876	11209	12695
Net	-7822	5743	7990
Net (YTD)	-213139	200312	329942

Source: NSDL, NSE

Debt Market Indicators	May 12	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.75%	4.75%
10 Yr Gilt^	7.05%	7.04%
91-day T-bill^	5.30%	5.30%
182-day T Bill^	5.49%	5.50%
364-day T Bill^	5.66%	5.64%
3-mth CP rate	7.40%	7.25%
6-mth CP rate	7.52%	7.43%
1-yr CP rate	7.85%	7.85%
3-mth CD rate	6.65%	6.60%
6-mth CD rate	7.05%	7.00%
12-mth CD rate	7.45%	7.45%
5 yr Corp Bond	7.74%	7.72%
Net LAF o/s (Rs Cr)*	-203015	-233321
M3 supply (Rs lakh Cr)**	311.59	309.27
G-sec Volume (Rs Cr)	49075	50025
SDF*	203015	244116
1 Year OIS	6.04%	5.96%
US 10-year Treasury Yield	4.46%	4.42%

*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 Tuesday, driven by a record low rupee and higher crude oil prices both influenced by diminishing prospects of a US-Iran peace agreement.
- The top losers were Adani Ports and Special Economic Zone, Shriram Finance, Tech Mahindra, HCL Technologies and Jio Financial Services, down 3.99-4.32%.
- The top gainers were Oil & Natural Gas Corporation, Hindalco Industries, State Bank of India and Bharti Airtel, up 0.17-4.70%.

Global Equity

- Wall Street stocks ended mixed on Tuesday with Nasdaq declining due to hotter-than-expected inflation data, uncertainty around U.S.-Iran ceasefire and selloffs in technology stocks while Dow Jones ended higher buoyed by healthcare stocks.
- FTSE index ended flat on Tuesday as gains in healthcare and personal care stocks were offsets by rising political uncertainty in the UK.
- Strait Times Index ended higher on Tuesday due to stock-specific gains.
- Nikkei Index ended higher on Tuesday, buoyed by a rise in artificial-intelligence-related stocks.
- Hang Seng Index ended lower on Tuesday due to profit-taking and concerns regarding global economic uncertainties.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended flat at 4.75% on Tuesday.
- Government bond prices ended lower on Tuesday, as declining hopes for a peace deal and increasing crude oil prices overshadowed a softer-than-expected inflation reading for April.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.05% on Tuesday compared to 7.04% on Monday.

Capital Market

- Manipal Health Enterprises, backed by Temasek, has acquired land and hospital property in Mumbai's Andheri for Rs 495 crore.
- ASK Curated Luxury Asset Fund I invested Rs 63 crore in Ananda Nilaya, a luxury villa project in Arpora, North Goa, featuring 28 villas with a revenue potential of Rs 360 crore.
- HrdWyr secured \$13 million in a Series A funding round led by Ideaspring Capital, with participation from Singularity AMC, Avatar Growth Capital, and Persistent Systems, to accelerate AI-native system-on-chip (AISoC) development and expand its global customer base.

Regulatory

- The Director General of the RBI, Poonam Gupta, stated that prosperity is both India's ambition and its destiny, emphasizing the importance of economic reforms and international cooperation to achieve sustainable and equitable growth in the country.
- SEBI proposed allowing depositories to use up to 5% of their income from the Investor Protection Fund (IPF) to cover administrative and staff expenses, aligning their rules with those of stock exchanges.

Economy and Government

- India's retail inflation rose to 3.48% in April 2026 from 3.40% in March 2026, approaching the Reserve Bank of India's 4% target, primarily due to rising food prices impacting household expenses.
- Crisil forecasted India's real GDP growth to slow down to 6.6% in 2026-27 from 7.6% in 2025-26, due to rising crude oil and commodity prices, weaker global growth amid the West Asia conflict, and a below-normal monsoon.
- According to DPIIT Secretary Amardeep Singh Bhatia, the Central government is set to launch a 'Made in India' branding scheme aimed at strengthening the global identity of Indian products, following a successful pilot in the steel sector.

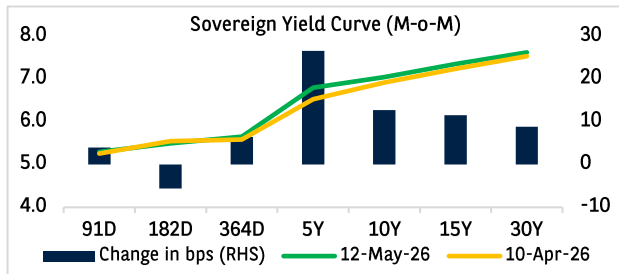
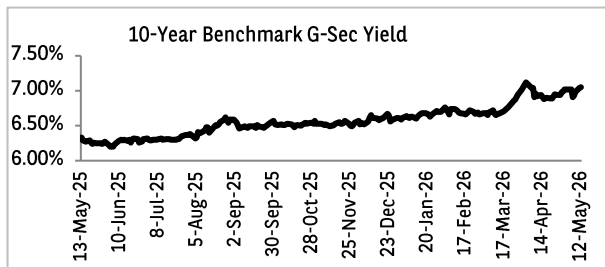
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	190,000	630,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.49	7.27	8.01	8.06	9.29	9.77
1-Yr	5.91	7.57	8.31	8.36	9.59	10.07
3-Yr	6.45	7.68	8.42	8.47	9.70	10.18
5-Yr	6.80	7.74	8.58	8.63	9.86	10.34
10-Yr	7.05	7.77	8.61	8.66	9.89	10.37

G-sec and corporate bonds data as of May 12

* Weighted average yields; Source: CRISIL



International

- US annual inflation rate increased to 3.8% in April 2026, reaching its highest level since May 2023, compared to 3.3% in March.
- US NFIB Small Business Optimism Index rose marginally to 95.9 in April 2026, compared to 95.8 in March 2026.
- Eurozone ZEW Indicator of Economic Sentiment rose by 11.3 points to -9.1 in May 2026 compared to -20.4 in April 2026.
- Japan coincident economic index edged up to 116.5 in March 2026 compared to a marginally revised 116.2 in February 2026.
- Japan's leading economic index increased to 114.5 in March 2026 compared to a slightly downwardly revised 113.2 in February 2026.

Commodities

- Crude oil prices rose by \$4.11 to \$102.18 a barrel on the NYMEX as differences between the US and Iran over a proposal to end the war raised concerns over supply disruptions.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.48% (Apr'26)	2.74% (Jan'26)	3.16% (Apr'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 12	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	107.77	104.21	67.52	64.96
NYMEX Crude Oil (\$/bbl)	102.18	98.07	62.84	61.95
Gold (Rs / 10 gm)#	151632	150362	155650	93076

ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	May 12	May 11
USD	95.56	95.20
GBP	129.57	129.38
Euro	112.34	111.93
100 Yen	60.71	60.60
Forex Reserve (\$ bn)*	690.69	698.49
Dollar Index	98.29	97.94

*Data pertains to May 1 and to Apr 24 respectively

Source: RBI, Financial Websites

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