

Indian Indices	Jan 13	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83628	-0.30	1.58	9.56	23.10
Nifty 50	25732	-0.22	2.00	11.46	22.40
BSE Mid cap	46043	-0.16	-0.51	8.60	31.90
Nifty Midcap	59598	-0.20	1.42	13.76	33.18
Nifty Smallcap	17296	0.60	-4.45	2.21	31.50
BSE SmallCap	49801	0.46	-6.30	-1.47	31.49

Source: BSE, NSE

Indian Indices	Jan 13	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61969	-0.37	4.08	22.74
BSE Bankex	66897	0.06	4.62	22.48
BSE CD	61443	-0.63	3.78	2.62
BSE CG	64612	-0.67	-6.31	4.33
BSE FMCG	19236	-0.19	-4.12	-5.95
BSE Healthcare	43403	-0.12	-2.83	1.98
BSE IT	36889	0.55	6.39	-15.25
BSE Metal	37458	0.39	10.66	39.74
BSE Oil & Gas	27470	0.12	0.58	9.37
BSE Power	6314	-0.34	-7.10	2.70
BSE Realty	6692	-0.56	-3.94	-5.60

Source: BSE, NSE

Global Indices	Jan 13	1D % Chg	3M % Chg	1Y % Chg
DJIA	49192	-0.80	6.78	16.30
Nasdaq	23710	-0.10	4.47	24.21
FTSE 100	10137	-0.03	7.35	23.26
Nikkei 225	53549	3.10	11.35	36.64
Hang Seng	26848	0.90	3.70	42.25

Source: Financial websites

Rs. Cr (Equity)	FII Inv Jan 12	MF Inv Jan 9	DII Inv Jan 13
Buy	9735	14650	14187
Sell	12843	9015	12864
Net	-3108	5634	1323
Net (YTD)	-14016	12158	23188

Source: NSDL, NSE

Debt Market Indicators	Jan 13	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.50%	4.75%
10 Yr Gilt^	6.63%	6.60%
91-day T-bill^	5.32%	5.33%
182-day T Bill^	5.54%	5.52%
364-day T Bill^	5.55%	5.54%
3-mth CP rate	7.03%	7.00%
6-mth CP rate	7.17%	7.17%
1-yr CP rate	7.22%	7.22%
3-mth CD rate	6.68%	6.60%
6-mth CD rate	6.95%	6.80%
12-mth CD rate	6.95%	6.87%
5 yr Corp Bond	7.24%	7.21%
Net LAF o/s (Rs Cr)*	-29881	-43776
M3 supply (Rs lakh Cr)**	298.01	290.58
G-sec Volume (Rs Cr)	52220	58725
SDF*	157091	170986
1 Year OIS	5.51%	5.49%
US 10-year Treasury Yield	4.18%	4.19%

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

**Dec 31 and Dec 15 respectively

Indian Equity

- Indian equity benchmarks closed lower on Tuesday, driven by escalating crude oil prices, sustained foreign fund outflows, depreciation of the rupee, tariff concerns and a weak technical momentum.
- The top losers were Trent, Larsen & Toubro, Dr. Reddy's Laboratories, InterGlobe Aviation and Reliance Industries, down 1.77-3.71%.
- The top gainers were Oil & Natural Gas Corporation, Eternal Ltd, ICICI Bank, Hindalco Industries and Max Healthcare Institute, up 1.60-3.30%.

Global Equity

- Wall Street stocks ended lower on Tuesday due to selloff in financial shares amid worries about US President's proposal for a cap on credit-card rates.
- FTSE index ended flat on Tuesday as gains buoyed by energy stocks were offset by concerns over domestic inflation and central bank's policy stance.
- Strait Times ended higher on Tuesday, buoyed by gains in blue-chip stocks.
- Nikkei Index closed higher on Tuesday, amid speculation that the prime minister may dissolve the House of Representatives next week and call for a general election.
- Hang Seng Index ended higher on Tuesday due to easing trade tensions, with reports that the EU is reassessing the tariffs on China-made electric vehicles imposed in 2024.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended higher at 5.50% on Tuesday compared to 4.75% on Monday.
- Government bond prices ended lower on Tuesday as Bloomberg Index Services unexpectedly held off including Indian debt in its global index.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.63% on Tuesday compared to 6.61% on Monday.

Capital Market

- Liquidnitro Games raised \$19.1 million in a Series A funding round led by Northpoint Capital, with participation from existing early investor Nexus Venture Partners.
- Sical Logistics received a letter of acceptance from South Eastern Coalfields (SECL) for a project worth Rs 4,038 cr.
- M3M India partnered with global fashion and lifestyle brand ELIE SAAB to develop two ultra-luxury housing projects in Delhi-NCR with a total investment of Rs 3,500 crore.

Regulatory

- RBI warned that rapid digitalisation is compressing the time available for regulators to respond to risks, demanding more agile oversight to safeguard financial stability.
- RBI deputy governor, Shirish Chandra Murmu said Many financial activities are now being unbundled and delivered through non-financial platforms and arrangements involving both regulated and unregulated entities that do not fit neatly within the existing regulatory scope of the RBI.
- The Pension Fund Regulatory and Development Authority (PFRDA) has constituted a high-level expert committee to develop a regulatory framework for assured payouts under the National Pension System (NPS).
- CCI approved home-grown private equity firm ChrysCapital's proposal to acquire a stake in Nash Industries (I) Pvt Ltd.

Economy and Government

- Financial Services Secretary M Nagaraju said India is trying to expand the global reach of its homegrown digital payment system UPI to a larger number of countries, especially in East Asia.
- The government of Tamil Nadu seals Rs 10,000 crore deal to build sovereign AI park.
- Chief Economic Advisor V Anantha Nageswaran said Inclusive finance has to be embedded in a broader ecosystem of health-care insurance and social security to protect lenders as well as borrowers.

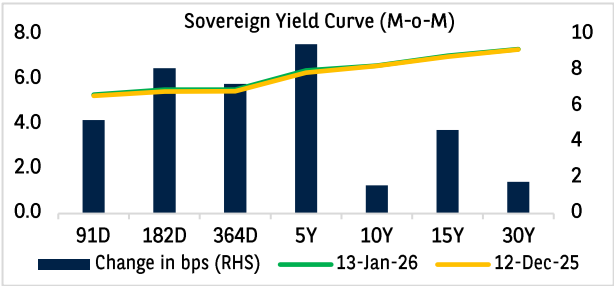
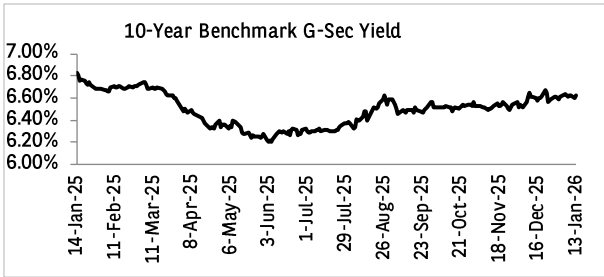
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	427,000	250,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.54	7.14	7.88	7.93	9.16	9.64
1-Yr	5.66	7.03	7.77	7.82	9.05	9.53
3-Yr	5.90	7.03	7.77	7.82	9.05	9.53
5-Yr	6.40	7.24	8.08	8.13	9.36	9.84
10-Yr	6.63	7.36	8.20	8.25	9.48	9.96

G-sec and corporate bonds data as of Jan 13

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	1.33% (Dec-25)	1.44% (Sep'25)	5.22% (Dec'24)
IIP	6.7% (Nov'25)	4.0% (Aug'25)	5.0% (Nov'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
GST Collection (in Rs cr)	1,74,550 (Dec-25)	1,89,017 (Sep-25)	1,76,857 (Dec-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Jan 13	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.47	63.87	63.32	81.01
NYMEX Crude Oil (\$/bbl)	61.15	59.5	59.49	78.82
Gold (Rs / 10 gm)#	140284	140449	124155	78308

ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Jan 13	Jan 12
USD	90.27	90.19
GBP	121.57	121.17
Euro	105.23	105.23
100 Yen	56.81	57.08
Forex Reserve (\$ bn)*	686.80	696.61
Dollar Index	99.13	98.86

*Data pertains to Jan 2 and to Dec 26 respectively

Source: RBI, Financial Websites

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