

| Indian Indices | Apr 13 | 1D % Chg | 3M % Chg | 1Y % Chg | PE |
|----------------|--------|----------|----------|----------|-------|
| BSE Sensex | 76848 | -0.91 | -8.11 | 2.25 | 21.12 |
| Nifty 50 | 23843 | -0.86 | -7.34 | 4.44 | 20.93 |
| BSE Mid cap | 44287 | -0.63 | -3.81 | 9.96 | NA |
| Nifty Midcap | 57513 | -0.57 | -3.50 | 13.88 | 35.56 |
| Nifty Smallcap | 16762 | -0.46 | -3.09 | 6.79 | 35.56 |
| BSE SmallCap | 48337 | -0.22 | -2.94 | 5.54 | NA |

Source: BSE, NSE

| Indian Indices | Apr 13 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| BSE Auto | 57483 | -2.10 | -7.24 | 24.81 |
| BSE Bankex | 62666 | -0.51 | -6.32 | 7.30 |
| BSE CD | 57870 | -0.57 | -5.82 | 5.05 |
| BSE CG | 71903 | -0.39 | 11.28 | 22.81 |
| BSE FMCG | 17615 | -1.22 | -8.43 | -12.65 |
| BSE Healthcare | 42508 | -0.26 | -2.06 | 5.22 |
| BSE IT | 29551 | -1.17 | -19.89 | -8.51 |
| BSE Metal | 40652 | -0.28 | 8.53 | 46.45 |
| BSE Oil & Gas | 26348 | -1.25 | -4.08 | 7.39 |
| BSE Power | 7352 | 0.89 | 16.43 | 12.86 |
| BSE Realty | 5867 | -0.39 | -12.33 | -4.11 |

Source: BSE, NSE

| Global Indices | Apr 13 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| DJIA | 48218 | 0.63 | -1.98 | 19.91 |
| Nasdaq | 23184 | 1.23 | -2.22 | 38.62 |
| FTSE 100 | 10583 | -0.17 | 4.40 | 32.88 |
| Nikkei 225 | 56503 | -0.74 | 5.52 | 68.24 |
| Hang Seng | 25661 | -0.90 | -4.42 | 22.69 |

Source: Financial websites

| Rs. Cr (Equity) | Fill Inv Apr 10 | MF Inv Apr 7 | DII Inv Apr 13 |
|-----------------|-----------------|--------------|----------------|
| Buy | 18909 | 17088 | 16612 |
| Sell | 17400 | 11601 | 14180 |
| Net | 1509 | 5487 | 2432 |
| Net (YTD) | -175561 | 171738 | 281971 |

Source: NSDL, NSE

| Debt Market Indicators | Apr 13 | 1D Ago |
|---------------------------|---------|---------|
| Repo Rate | 5.25% | 5.25% |
| Call Rate | 5.10% | 4.75% |
| 10 Yr Gilt^ | 6.94% | 6.92% |
| 91-day T-bill^ | 5.28% | 5.26% |
| 182-day T Bill^ | 5.49% | 5.55% |
| 364-day T Bill^ | 5.59% | 5.59% |
| 3-mth CP rate | 6.51% | 6.51% |
| 6-mth CP rate | 7.17% | 7.15% |
| 1-yr CP rate | 7.35% | 7.35% |
| 3-mth CD rate | 6.09% | 6.15% |
| 6-mth CD rate | 6.80% | 6.80% |
| 12-mth CD rate | 6.97% | 7.00% |
| 5 yr Corp Bond | 7.62% | 7.60% |
| Net LAF o/s (Rs Cr)* | -563945 | -563995 |
| M3 supply (Rs lakh Cr)** | 301.93 | 302.98 |
| G-sec Volume (Rs Cr) | 56260 | 83460 |
| SDF* | 441668 | 559722 |
| 1 Year OIS | 5.84% | 5.83% |
| US 10-year Treasury Yield | 4.30% | 4.31% |

*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 lower on Monday, weighed down by rising oil prices and diminishing prospects for a resolution of the West Asia conflict.
- The top losers were Eicher Motors, Maruti Suzuki India, Bajaj Finance, Reliance Industries and InterGlobe Aviation, down 2.64%-5.04%.
- The top gainers were HDFC Life Insurance Company, Adani Enterprises, ICICI Bank, NTPC and Tata Motors Passenger Vehicles, up 0.88%-2.71%.

Global Equity

- Wall Street stocks closed higher on Monday as optimism over a potential Middle East resolution and the start of earnings season outweighed concerns from failed US-Iran talks.
- FTSE index closed lower on Monday due to uncertainty over the Middle East conflict and the collapse of peace talks.
- Strait Times Index ended lower on Monday, due to rising inflation concerns amid the West Asia conflict, ahead of the central bank meeting.
- Nikkei Index ended lower on Monday, as reignited geopolitical uncertainties in West Asia pushed oil prices higher.
- Hang Seng Index closed lower on Monday, as oil prices surged amid escalating geopolitical uncertainties in West Asia.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended higher at 5.10% on Monday compared to 4.75% on Friday.
- Government bond prices ended lower on Monday dragged down by softer-than-expected inflation.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.94% on Monday compared to 6.91% on Friday.

Capital Market

- Krisumi Corporation Ltd, a joint venture between Japan's Sumitomo Corporation and Krishna Group plans to invest around Rs 4,500 crore over the next 6-7 years on its ongoing 33.5 acre luxury housing project in Gurugram.
- Aster DM Healthcare announced an investment of Rs 96 crore for the expansion of its women & children facility at Aster Whitefield Hospital, Bengaluru.
- Tesco partnered with US software group Adobe to deepen its use of artificial intelligence in analysing customer data, aiming to boost sales through more personalised marketing.

Regulatory

- Reserve Bank Deputy Governor Swaminathan J has said adoption of artificial intelligence (AI) without safeguards can amplify existing weaknesses and create new problems in the financial sector.

Economy and Government

- According to government data released, India's retail inflation rose to 3.40% year-on-year in March 2026, up from 3.21% in February 2026.
- The World Bank approved a \$225 million loan for the highway modernization project in Rajasthan, which will benefit more than 3 million people, improve connectivity and create jobs.
- Prime Minister Narendra Modi said the Parliament is close to creating "new history" when the Women's Reservation Act will be amended this week for its implementation in 2029.
- The Ministry of External Affairs said India and France reviewed key deliverables, including cooperation in economic security, during the Foreign Office Consultations in Paris.
- Union Coal and Mines Minister G Kishan Reddy said that the Centre aims to reduce dependence on imports and make the country 'atma nirbhar' (self-reliant) in the minerals sector.

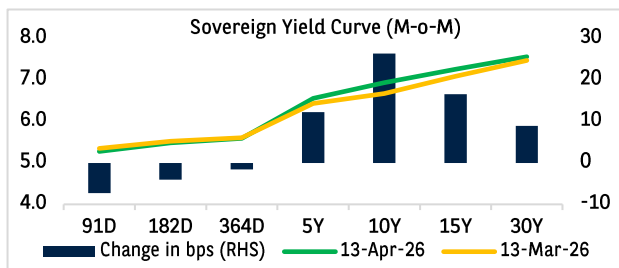
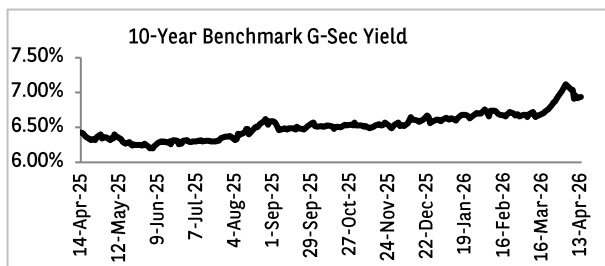
| Borrowing (in Rs cr) | Total | Completed | Balance |
|----------------------|---------|-----------|---------|
| FY 2025 | 820,000 | 63,000 | 757,000 |

Source: RBI

| Yields (%) | G-sec* | AAA | AA+ | AA | AA- | A+ |
|------------|--------|------|------|------|------|-------|
| 6-mth | 5.49 | 7.07 | 7.81 | 7.86 | 9.09 | 9.57 |
| 1-Yr | 5.87 | 7.39 | 8.13 | 8.18 | 9.41 | 9.89 |
| 3-Yr | 6.41 | 7.46 | 8.20 | 8.25 | 9.48 | 9.96 |
| 5-Yr | 6.56 | 7.62 | 8.46 | 8.51 | 9.74 | 10.22 |
| 10-Yr | 6.94 | 7.69 | 8.53 | 8.58 | 9.81 | 10.29 |

G-sec and corporate bonds data as of Apr 13

* Weighted average yields; Source: CRISIL



International

- US existing home sales fell by 3.6% from the previous month to an annualized rate of 3.98 million in March of 2026, the lowest in nine months.
- China Outstanding Loan Growth increased 5.70% in March 2026 compared to 6.00% rise in February 2026.
- China recorded a trade surplus of 51.13 USD Billion in March of 2026. Balance of Trade in China averaged 18.80 USD Billion from 1981 until 2026, reaching an all time high of 213.62 USD Billion in February of 2026.

Commodities

- Crude oil prices rose by \$2.51 to \$99.08 a barrel on the NYMEX as the US blockade of Iranian ports and escalating tensions following failed talks heightened supply concerns.

Economic Indicators

| YoY (%) | Current | Quarter Ago | Year Ago |
|---------------------------|----------------------|----------------------|----------------------|
| Monthly Inflation (CPI) | 3.40% (Mar'26) | 1.33% (Dec'25) | 3.34% (Mar'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 13 | 1D Ago | 3M Ago | 1Y Ago |
|---------------------------------|--------|--------|--------|--------|
| London Brent Crude Oil (\$/bbl) | 99.36 | 95.2 | 65.47 | 64.76 |
| NYMEX Crude Oil (\$/bbl) | 99.08 | 96.57 | 61.15 | 61.5 |
| Gold (Rs / 10 gm)# | 150011 | 150327 | 140284 | 93353 |

ibjarates spot prices

Source: Financial Websites, IBJA

| Currencies Vs INR | Apr 13 | Apr 10 |
|------------------------|--------|--------|
| USD | 93.37 | 92.65 |
| GBP | 125.22 | 124.31 |
| Euro | 109.15 | 108.28 |
| 100 Yen | 58.49 | 58.16 |
| Forex Reserve (\$ bn)* | 697.12 | 688.06 |
| Dollar Index | 98.37 | 98.65 |

*Data pertains to Apr 3 and to Mar 27 respectively

Source: RBI, Financial Websites

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