

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 14	1D % Chg	3M % Chg	1Y % Chg
DJIA	48536	0.66	-1.25	19.77
Nasdaq	23639	1.96	0.71	40.45
FTSE 100	10609	0.25	4.17	30.42
Nikkei 225	57877	2.43	6.51	70.32
Hang Seng	25872	0.82	-4.18	20.80

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 Tuesday due to optimism over renewed Middle East talks and steady economic data.
- FTSE index closed higher on Tuesday as optimism over potential US-Iran peace talks outweighed concerns over a weaker economic outlook.
- Strait Times Index closed higher on Tuesday, driven by gains in banking stocks and supportive growth data.
- Nikkei Index closed higher on Tuesday, boosted by optimism regarding resolution of the conflict in the Middle East and the subsequent drop in oil prices.
- Hang Seng Index closed higher on Tuesday, driven by AI and gold-related stocks amid US-Iran resolution talks.
- 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 as failed US-Iran talks pushed crude higher, fuelling inflation concerns.
- 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

- Poonawalla Fincorp raised Rs 2,500 crore through a Qualified Institutions Placement (QIP) from institutional investors and long-term funds.
- 360 ONE Asset secured commitments worth Rs 2,000 crore for its Private Investment in Public Equity (PIPE) strategy.
- Jindal Supreme (India) refilled its draft papers with the Securities and Exchange Board of India to raise funds via IPO for the main purpose of debt reduction.
- GAIL (India) Limited plans to invest Rs 3,800 crore in setting up 700 MW of solar power capacity across Uttar Pradesh and Maharashtra, as part of its push towards clean energy and net-zero goals.
- Everstone Capital invested about \$270 million for a significant stake in a combined platform formed with the promoters of India's Apothecan and US-based Navinta.

## Economy and Government

- According to S&P Global Ratings, India's robust macroeconomic and financial sector fundamentals are likely to cushion the impact of a sustained oil price shock, though economic growth could slow by up to 80-basis points if crude averages \$130 per barrel in 2026.
- The International Monetary Fund (IMF) raised India's growth forecast for this financial year to 6.5%, up from 6.4% projected in January and 6.2% in October last year, citing carryover from a strong 2025 performance and reduction in US tariffs to 10% from 50%, which offset the negative impact of the Iran war.
- The government announced the amendment of rules to revise the pricing norms for low-grade iron ore, a move aimed at curbing wastage and enhancing utilisation of such reserves to ensure a steady supply to the steel industry.
- The Centre extended subsidies for electric two-wheelers until July 2026 and for electric three-wheelers until March 2028, citing supply risks linked to tensions in West Asia.
- The Uttar Pradesh government hiked minimum wages across worker categories following unrest in Noida, with revised rates coming into effect from April 1 retrospectively.

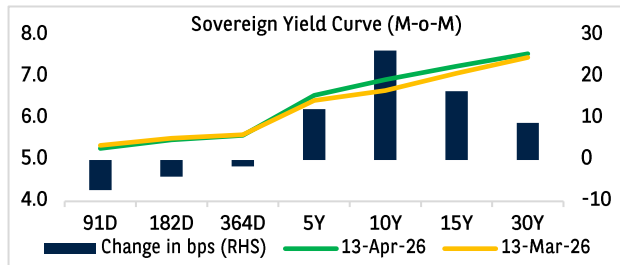
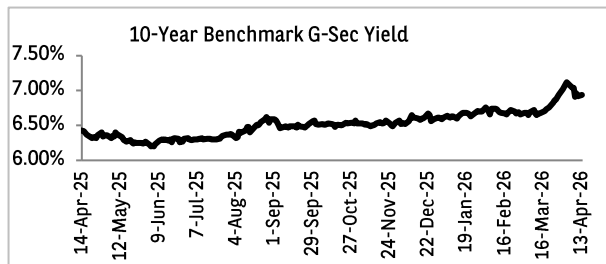
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	63,000	757,000

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

- The International Monetary Fund cut its growth outlook to 3.1% for 2026 due to Iran war-driven energy price spikes and supply disruptions and warned that the global economy would teeter on the brink of recession if the conflict worsens and oil stays above \$100 per barrel through 2027.
- US producer prices increased by 4.0% year-over-year in March 2026, compared to a 3.4% increase in February 2026 while the core producer prices rose by 3.8%, matching previous month's revised data.
- US NFIB Small Business Optimism Index fell to 95.8 points in March 2026, compared to 98.8 in February 2026.
- Japan Industrial Production increased 0.40% in February 2026 compared to 0.70% in January 2026.
- Japan machinery orders increased 13.7% year-on-year in January 2026, compared to a 16.8% rise in December 2025.

## Commodities

- Crude oil prices fell to \$91.28 a barrel on the NYMEX as hopes of renewed US-Iran talks eased concerns over supply disruptions from the Strait of Hormuz blockade.

## 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)*	94.79	99.36	66.52	64.88
NYMEX Crude Oil (\$/bbl)*	91.28	99.08	62.02	61.53
Gold (Rs / 10 gm)#	150011	150327	140284	93353

# ibjarates spot prices

Source: Financial Websites, IBJA \*Data as of Apr 14

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^	98.12	98.37

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

Source: RBI, Financial Websites ^Data as of Apr 14

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