

Indian Indices	May 14	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	75399	1.06	-8.75	-7.29	20.40
Nifty 50	23690	1.18	-6.99	-3.96	20.61
BSE Mid cap	46279	0.65	1.26	4.40	NA
Nifty Midcap	60840	1.12	2.22	8.38	34.85
Nifty Smallcap	17992	-0.01	5.93	4.92	30.00
BSE SmallCap	52303	0.29	6.14	4.65	NA

Source: BSE, NSE

Indian Indices	May 14	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	57388	0.64	-8.31	9.62
BSE Bankex	60961	1.23	-9.65	-2.26
BSE CD	58238	0.93	-1.09	-0.66
BSE CG	77604	0.69	13.72	15.93
BSE FMCG	18755	0.24	0.11	-8.72
BSE Healthcare	47108	2.08	10.49	11.46
BSE IT	26680	-1.84	-15.55	-28.28
BSE Metal	44263	2.03	13.13	44.79
BSE Oil & Gas	27322	-0.10	-4.45	1.29
BSE Power	8013	1.44	19.36	20.37
BSE Realty	6019	0.75	-5.99	-11.86

Source: BSE, NSE

Global Indices	May 14	1D % Chg	3M % Chg	1Y % Chg
DJIA	50063	0.75	1.14	19.05
Nasdaq	26635	0.88	18.13	39.11
FTSE 100	10373	0.46	-0.70	20.83
Nikkei 225	62654	-0.98	10.03	64.33
Hang Seng	26389	0.00	-0.67	11.63

Source: Financial websites

Rs. Cr (Equity)	FII Inv May 13	MF Inv May 11	DII Inv May 14
Buy	14697	17552	18256
Sell	18615	13151	17572
Net	-3919	4401	684
Net (YTD)	-217865	204713	336496

Source: NSDL, NSE

Debt Market Indicators	May 14	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.50%	5.20%
10 Yr Gilt^	7.02%	7.05%
91-day T-bill^	5.38%	5.34%
182-day T Bill^	5.57%	5.50%
364-day T Bill^	5.70%	5.70%
3-mth CP rate	7.65%	7.50%
6-mth CP rate	7.75%	7.65%
1-yr CP rate	7.90%	7.87%
3-mth CD rate	6.95%	6.79%
6-mth CD rate	7.17%	7.10%
12-mth CD rate	7.55%	7.50%
5 yr Corp Bond	7.76%	7.76%
Net LAF o/s (Rs Cr)*	-231833	-237036
M3 supply (Rs lakh Cr)**	311.59	309.27
G-sec Volume (Rs Cr)	65580	48410
SDF*	239023	244226
1 Year OIS	6.10%	6.09%
US 10-year Treasury Yield	4.47%	4.46%

\*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 higher on Thursday in anticipation of government measures to mitigate weakness in the rupee, including potential tightening of the Liberalised Remittance Scheme to stem capital outflows.
- The top gainers were Adani Enterprises, Cipla, Bharti Airtel, Eternal and Hindalco Industries, up 2.88-8.55%.
- The top losers were Infosys, Tech Mahindra, HCL Technologies, Coal India and Tata Consultancy Services, down 1.01-2.58%.

## Global Equity

- Wall Street stocks ended higher on Thursday buoyed by gains in technology stocks following China chip sales approval and upbeat retail sales data.
- FTSE index edged up on Thursday, following strong first-quarter economic growth data.
- Strait Times Index ended lower on Thursday amid cautious investor sentiment following the highly anticipated US-China meeting.
- Nikkei Index ended lower on Thursday, as inflation concerns and rising interest rates outweighed optimism surrounding technology stocks.
- Hang Seng Index ended flat on Thursday, as investor sentiment remained cautious following the meeting between Chinese President Xi Jinping and US President Donald Trump.
- At 8.30 AM, Asian Markets were mostly trading higher.

## Indian Debt

- The interbank call-money rate ended lower at 4.50% on Thursday compared to 5.20% on Wednesday.
- Government bond prices ended higher on Thursday due to reports of potential tax cuts to attract foreign inflows and optimism from a US-China meeting about ending the Iran war.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 7.02% on Thursday compared to 7.05% on Wednesday.

## Capital Market

- DLF Ltd committed an additional investment of Rs 21,300 crore to finalize its ongoing residential projects, primarily located in Delhi-NCR, Mumbai, and the Chandigarh tri-city area.
- HFCL plans to invest Rs 230 crore to set up a defence facility in Andhra Pradesh for producing hand grenades, operational by December 2027.
- Dhruva Space has been awarded a Rs 105 crore grant for Project Garud, which is focused on developing a standardized satellite platform. The initiative seeks to create a domestic manufacturing ecosystem capable of supporting mass satellite deployment.
- Inox Clean Energy acquired Boviet Solar's US solar manufacturing assets in North Carolina for \$750 million, strengthening its presence in the US solar market.

## Regulatory

- SEBI has proposed a major overhaul of exchange-traded derivatives rules to simplify compliance, unify commodity and financial derivatives regulations, ease norms for exchanges and clearing corporations, and seek public feedback by June 4, 2026.

## Economy and Government

- India's wholesale inflation jumped to 8.30% in April 2026, up sharply from 3.88% in March, mainly due to soaring fuel, power, and crude oil prices.
- The central government clarified, the employees can now exercise a one-time, irreversible option to include either their parents or parents-in-law as dependents for CGHS and CS (MA) medical benefits, and once chosen by male employees, this selection cannot be changed later, even if circumstances change.
- Maharashtra has entered into a major agreement with AM Intelligence Labs to establish a large-scale green data centre and artificial intelligence hub near Mumbai, with an investment of Rs 1.14 lakh crore.

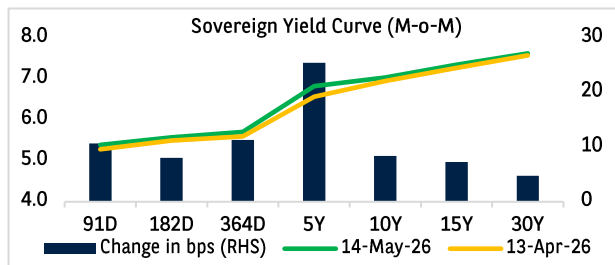
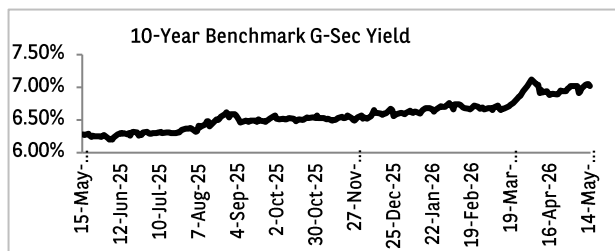
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	190,000	630,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.57	7.34	8.08	8.13	9.36	9.84
1-Yr	5.97	7.66	8.40	8.45	9.68	10.16
3-Yr	6.43	7.72	8.46	8.51	9.74	10.22
5-Yr	6.81	7.76	8.60	8.65	9.88	10.36
10-Yr	7.02	7.79	8.63	8.68	9.91	10.39

G-sec and corporate bonds data as of May 14

\* Weighted average yields; Source: CRISIL



## International

- The United States experienced a 4.9% year-on-year increase in retail sales for April 2026, building on the upwardly revised 4.2% growth recorded in March.
- US initial jobless claims increased by 12,000 during the first week of May, reaching a total of 211,000 filings for the week.
- US export prices climbed by 3.3% month-over-month in April 2026, accelerating from a downwardly revised 1.5% advance in March while import prices advanced 4.2% compared to 2.3%.
- The UK economy grew 1.1% in first quarter of 2026, compared to 1.0% in the last quarter of 2025.
- UK's industrial production remained flat at 0.0% in March 2026, missing compared to a revised 0.5% decline in the previous month while the manufacturing production increased by 1.2% compared to a revised 0.8% decline.

## Commodities

- Crude oil prices rose by 15 cents to \$101.17 a barrel on the NYMEX amid persistent supply worries following concerns over attacks on ship and the seizure in the Strait of Hormuz.

## 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 14	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	105.72	105.63	67.75	66.09
NYMEX Crude Oil (\$/bbl)	101.17	101.02	62.89	63.15
Gold (Rs / 10 gm)#	161159	160977	152765	93859

# ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	May 14	May 13
USD	95.75	95.65
GBP	129.51	129.56
Euro	112.19	112.20
100 Yen	60.65	60.65
Forex Reserve (\$ bn)*	690.69	698.49
Dollar Index	99.06	98.48

\*Data pertains to May 1 and to Apr 24 respectively

Source: RBI, Financial Websites

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