

Indian Indices	Sep 12	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81905	0.44	0.26	-1.28	22.67
Nifty 50	25114	0.43	0.91	-1.08	22.06
BSE Mid cap	46184	0.09	0.78	-5.77	33.96
Nifty Midcap	58227	0.32	-0.37	-2.37	31.73
Nifty Smallcap	17990	0.64	-2.57	-7.05	32.16
BSE SmallCap	53548	0.27	0.03	-5.37	31.42

Source: BSE, NSE

Indian Indices	Sep 12	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59962	0.41	14.22	3.08
BSE Bankex	61446	0.38	-2.79	4.63
BSE CD	61655	-0.17	7.42	-6.70
BSE CG	69692	1.76	-0.12	-4.01
BSE FMCG	20786	-0.70	2.62	-12.75
BSE Healthcare	44923	0.27	2.19	1.44
BSE IT	35474	0.32	-6.33	-18.95
BSE Metal	32782	0.80	5.75	3.58
BSE Oil & Gas	26234	-0.03	-3.96	-14.99
BSE Power	6690	0.44	-1.27	-18.76
BSE Realty	6869	0.02	-12.06	-15.08

Source: BSE, NSE

Global Indices	Sep 12	1D % Chg	3M % Chg	1Y % Chg
DJIA	45834	-0.59	6.67	11.53
Nasdaq	22141	0.44	12.61	26.02
FTSE 100	9283	-0.15	4.48	12.65
Nikkei 225	44768	0.89	17.28	21.54
Hang Seng	26388	1.16	9.79	53.06

Source: Financial websites

Rs. Cr (Equity)	FII Inv Sep 11	MF Inv Sep 9	DII Inv Sep 12
Buy	10398	4759	11275
Sell	13812	5071	9665
Net	-3414	-312	1610
Net (YTD)	-136065	362495	521987

Source: NSDL, NSE

Debt Market Indicators	Sep 12	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	4.95%	5.00%
10 Yr Gilt^	6.49%	6.47%
91-day T-bill^	5.50%	5.50%
182-day T Bill^	5.60%	5.61%
364-day T Bill^	5.64%	5.64%
3-mth CP rate	6.60%	6.59%
6-mth CP rate	6.75%	6.70%
1-yr CP rate	6.90%	6.87%
3-mth CD rate	5.87%	5.87%
6-mth CD rate	6.16%	6.14%
12-mth CD rate	6.42%	6.42%
5 yr Corp Bond	6.96%	6.94%
Net LAF o/s (Rs Cr)*	-294238	-270084
M3 supply (Rs lakh Cr)**	283.08	282.90
G-sec Volume (Rs Cr)	63795	52565
SDF*	124040	99886
1 Year OIS	5.48%	5.46%
US 10-year Treasury Yield	4.06%	4.01%

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

**Aug 22 and Aug 8 respectively

Indian Equity

- Indian equity benchmarks closed higher on Friday as softer US jobs data boosted hopes that the Federal Reserve would cut rates and as optimism grew over a potential revival of US-India trade ties.
- The top gainers were Bharat Electronics Ltd, Bajaj Finance, Bajaj Finserv, Hindalco and Shriram Finance — up 2.06-3.67%.
- The top losers were Eternal, HUL, Bajaj Auto, IndusInd Bank and Trent — down 0.79-2.04%.

Global Equity

- Wall Street stocks closed mixed on Friday as Nasdaq ended higher lifted by strong gains in IT while Dow Jones declined due to stock specific losses following weaker jobs market data.
- FTSE index closed lower on Friday as weakness in consumer staples and healthcare stocks outweighed optimism from domestic economic data.
- Strait Times Index closed lower on Friday due to stock-specific losses.
- Nikkei Index closed higher on Friday as investors became optimistic about the Fed's key interest rate decision this month.
- Hang Seng Index closed higher on Friday after US inflation data raised expectations of a cut in interest rates by the Federal Reserve.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended lower at 4.95% on Friday compared to 5.00% on Thursday.
- Government bond prices fell on Friday after inflation ticked up in August, reducing room for further RBI rate cuts.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.49% on Friday compared to 6.47% on Thursday.

Capital Market

- Maharashtra government signed a memorandum of understanding (MoU) with Lodha Developers to develop a Green Integrated Data Centre Park in Palava worth Rs 30,000 crore.
- Tata Technologies acquired Germany's ESTEC for Rs 750 crore to strengthen its position in Europe's automotive hub.
- Marico plans to acquire the remaining 46.02% stake in HW Wellness Solutions for Rs 138 crore.
- RailTel secured two major project orders worth Rs 103.46 crore from Nashik Smart City and Panvel Municipal Corporation for smart city and connectivity infrastructure projects aligned with its core services.
- Nextgen Semiconductors plans to raise around Rs 1,000-1,500 crore through equity and other instruments in the next 12 months.
- Lakshya Powertech received a work order worth Rs 48.63 crore from Oil Indiato hire CNG services along with transportation to consumption centers/decanting to Oil's pipeline on a BOO (Build,Own and Operate) model.

Regulatory

- Securities and Exchange Board of India (Sebi) approved changes in the minimum public offer (MPO) and timeline for meeting minimum shareholding requirements.
- Sebi approved a single-window clearance system to simplify market access for foreign portfolio investors.

Economy and Government

- India consumer price inflation accelerated to 2.07% in August 2025, compared to an upwardly revised 1.61% in July 2025.
- Prime Minister Narendra Modi launched the 'Gyan Bharatam' portal, a digital repository to preserve and disseminate ancient Indian manuscripts.
- The government announced the annual licensing policy for the 2025-26 crop year for opium poppy cultivation in Madhya Pradesh, Rajasthan and Uttar Pradesh.

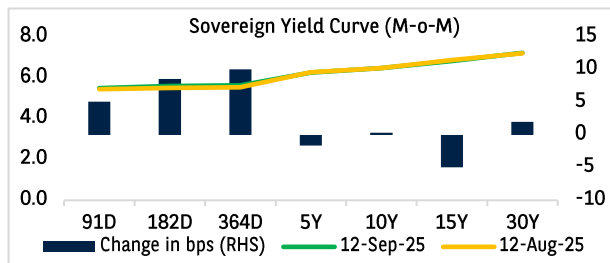
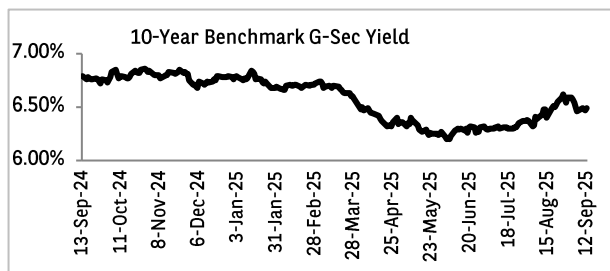
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	6,79,000	1,21,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.60	6.45	7.16	7.20	8.43	8.96
1-Yr	5.62	6.77	7.48	7.52	8.75	9.28
3-Yr	6.03	6.89	7.60	7.64	8.87	9.40
5-Yr	6.25	6.96	7.77	7.80	9.04	9.57
10-Yr	6.49	7.23	8.04	8.07	9.31	9.84

G-sec and corporate bonds data as of Sep 12

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	2.07% (Aug-25)	2.82% (May-25)	3.65% (Aug-24)
IIP	3.5% (Jul-25)	2.6% (Apr-25)	5.0% (Jul-24)
GDP	7.8% (Apr-Jun FY25)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY24)
GST Collection (in Rs cr)	1,86,315 (Aug-25)	2,01,050 (May-25)	1,74,962 (Aug-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Sep 12	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.99	66.37	69.36	71.97
NYMEX Crude Oil (\$/bbl)	62.69	62.37	68.04	68.97
Gold (Rs / 10 gm)#	109707	109097	97455	71801

ibjarates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Sep 12	Sep 11
USD	88.28	88.26
GBP	119.66	119.33
Euro	103.60	103.19
100 Yen	59.87	59.76
Forex Reserve (\$ bn)*	698.27	694.23
Dollar Index	97.55	97.54

*Data pertains to Sep 5 and to Aug 29 respectively

Source: RBI, Financial Websites

International

- US Michigan 5-Year Inflation Expectations increased to 3.9% in August 2025, compared to 3.5% in July 2025.
- The British economy expanded 1.4% year-on-year in July 2025, maintaining the same pace as in June 2025.
- UK construction output rose 2.4% year-on-year in July 2025, compared to 1.5% in June 2025.
- UK Industrial Production increased 0.1% in July 2025 compared to 0.2% in June 2025 while the manufacturing production rose by 0.2% compared to 0.0%.
- China new home prices across 70 cities dropped 2.5% on-year in August 2025, compared to a 2.8% drop in July 2025.
- China industrial production grew by 5.2% on-year in August 2025, compared to 5.7% in July 2025.
- China retail sales grew 3.4% on-year in August 2025, compared to 3.7% in July 2025.
- China surveyed unemployment rate edged higher to 5.3% in August 2025, compared to 5.2% in July 2025.
- Japan Industrial Production decreased 0.4% in July 2025 compared to 4.4% in June 2025.

Commodities

- Crude oil prices rose by 32 cents to \$62.69 a barrel on the NYMEX on Russian supply concerns.

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