

Indian Indices	Jan 14	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83383	-0.29	1.65	9.00	23.03
Nifty 50	25666	-0.26	2.07	10.74	22.38
BSE Mid cap	46115	0.16	0.39	6.51	31.94
Nifty Midcap	59771	0.29	2.48	11.35	33.27
Nifty Smallcap	17411	0.67	-2.95	0.89	31.70
BSE SmallCap	49927	0.25	-5.16	-2.86	31.56

Source: BSE, NSE

Indian Indices	Jan 14	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61586	-0.62	3.60	19.51
BSE Bankex	67184	0.43	5.44	21.52
BSE CD	60854	-0.96	3.96	0.81
BSE CG	64746	0.21	-5.46	2.85
BSE FMCG	19134	-0.53	-4.14	-5.49
BSE Healthcare	43363	-0.09	-2.32	0.82
BSE IT	36534	-0.96	5.84	-14.61
BSE Metal	38459	2.67	14.71	38.61
BSE Oil & Gas	27632	0.59	2.21	7.83
BSE Power	6357	0.67	-6.03	-1.07
BSE Realty	6627	-0.98	-3.97	-7.29

Source: BSE, NSE

Global Indices	Jan 14	1D % Chg	3M % Chg	1Y % Chg
DJIA	49150	-0.09	6.22	15.60
Nasdaq	23472	-1.00	4.22	23.25
FTSE 100	10184	0.46	7.74	24.18
Nikkei 225	54341	1.48	16.00	41.24
Hang Seng	27000	0.56	6.13	40.48

Source: Financial websites

Rs. Cr (Equity)	FII Inv Jan 13	MF Inv Jan 9	DII Inv Jan 14
Buy	13454	14650	18155
Sell	13884	9015	13098
Net	-430	5634	5057
Net (YTD)	-14446	12158	28245

Source: NSDL, NSE

Debt Market Indicators	Jan 14	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.50%	5.50%
10 Yr Gilt^	6.65%	6.63%
91-day T-bill^	5.34%	5.32%
182-day T Bill^	5.59%	5.54%
364-day T Bill^	5.57%	5.55%
3-mth CP rate	7.03%	7.03%
6-mth CP rate	7.25%	7.17%
1-yr CP rate	7.30%	7.22%
3-mth CD rate	6.70%	6.68%
6-mth CD rate	6.94%	6.95%
12-mth CD rate	6.96%	6.95%
5 yr Corp Bond	7.26%	7.24%
Net LAF o/s (Rs Cr)*	-114646	-29881
M3 supply (Rs lakh Cr)**	298.01	290.58
G-sec Volume (Rs Cr)	43810	52220
SDF*	114646	157091
1 Year OIS	5.51%	5.51%
US 10-year Treasury Yield	4.15%	4.18%

*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 Wednesday, primarily because of concerns over prospective fresh US tariffs and persistent foreign fund outflows.
- The top losers were, Asian Paints, Tata Consultancy Services, Tata Consumer Products, Maruti Suzuki India and Hindustan Unilever, down 1.65-2.40%.
- The top gainers were, Tata Steel, NTPC, Axis Bank, Hindalco Industries and Oil & Natural Gas Corporation, up 1.72-3.71%.

Global Equity

- Wall Street stocks closed lower on Wednesday dragged down by losses in technology stock and financial stocks due to weak bank earnings.
- FTSE index closed higher on Wednesday boosted by gains in miners and healthcare shares.
- Strait Times Index ended higher on Wednesday, buoyed by the positive sentiment prevailing across Asian markets.
- Nikkei Index closed higher on Wednesday, fuelled by speculation of a potential snap election that could lead to increased fiscal stimulus.
- Hang Seng Index ended higher on Wednesday, buoyed by China's record trade surplus for 2025.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended flat at 5.50% on Wednesday.
- Government bond prices ended lower on Wednesday amid disappointment as Bloomberg Index Services 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 6.65% on Wednesday compared to 6.63% on Tuesday.

Capital Market

- NLC India Limited signed a non-binding MoU with the Government of Gujarat worth Rs 25,000 crore to develop large-scale renewable energy projects across the state.
- Mitra announced a merger with Tierra Agrotech in a Rs 787 crore deal and plans to list on the Bombay Stock Exchange by September 2026.
- State Street Investment Management will acquire a 23% stake in Groww Asset Management for \$65 million (Rs 580 crore).
- Interarch Building Solutions secured an order worth Rs 130 crore from a domestic entity. Larsen & Toubro (L&T) announced that the company's heavy civil infrastructure business vertical has secured a 'large' order from Torrent Energy Storage Solutions Pvt Ltd for the construction of the 3000 MW Saidongar-1 Pumped Storage Project (PSP) in Maharashtra.

Regulatory

- The RBI has directed banks and eligible NBFCs to automatically escalate partially resolved or rejected complaints to the internal ombudsman and convey final decisions within 30 days.
- The Reserve Bank of India has recognised the Foreign Exchange Dealers' Association of India (FEDAI) as a self-regulatory organisation (SRO) for all authorised dealers under its Omnibus framework for SROs.
- The pension regulator announced new measures to make retirement savings under the National Pension System (NPS) more flexible and accessible for various subscribers, including children and employees of small businesses.

Economy and Government

- India wholesale prices increased 0.83% year-on-year in December 2025, compared to a 0.32% drop in November 2025.
- Prime Minister Narendra Modi said the harvest festival reflects the richness of the country's cultural landscape and reminds citizens of the spirit of togetherness that binds everyone.
- The Delhi government approved a policy framework that will allow it to generate revenue by monetising reductions in carbon emissions.

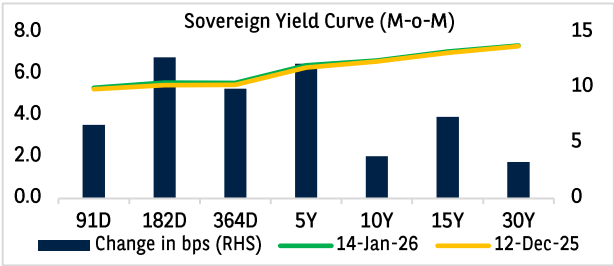
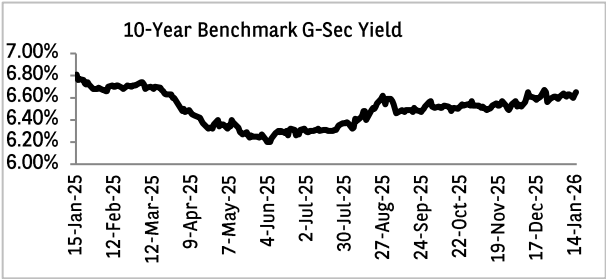
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	427,000	250,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.59	7.30	8.04	8.09	9.32	9.80
1-Yr	5.70	7.08	7.82	7.87	9.10	9.58
3-Yr	5.94	7.08	7.82	7.87	9.10	9.58
5-Yr	6.43	7.26	8.10	8.15	9.38	9.86
10-Yr	6.65	7.38	8.22	8.27	9.50	9.98

G-sec and corporate bonds data as of Jan 14

* 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 14	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.52	65.47	62.39	79.92
NYMEX Crude Oil (\$/bbl)	62.02	61.15	58.7	77.5
Gold (Rs / 10 gm)#	142015	140284	126152	78028

Ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Jan 14	Jan 13
USD	90.20	90.27
GBP	121.20	121.57
Euro	105.05	105.23
100 Yen	56.62	56.81
Forex Reserve (\$ bn)*	686.80	696.61
Dollar Index	99.13	99.13

*Data pertains to Jan 2 and to Dec 26 respectively

Source: RBI, Financial Websites

International

- US PPI increased 3% on year in November compared to 2.8% in October.
- US retail sales increased 3.30% on year in November unchanged from October.
- China posted a record USD 1.189 trillion trade surplus in 2025, reaching to USD 114.1 billion in December 2025.
- US existing home sales increased to 5.10% on month in December from 0.70% in November.
- Japan producer prices rose 2.4% year-on-year in December 2025, compared to a 2.7% increase in November 2025.

Commodities

- Crude oil prices rose by 87 cents to \$62.02 a barrel on the NYMEX on fears of potential supply disruptions due to escalating geopolitical tensions.

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