

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.

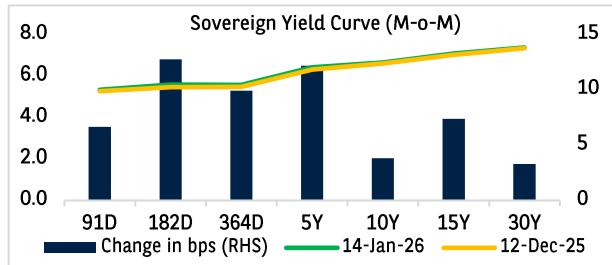
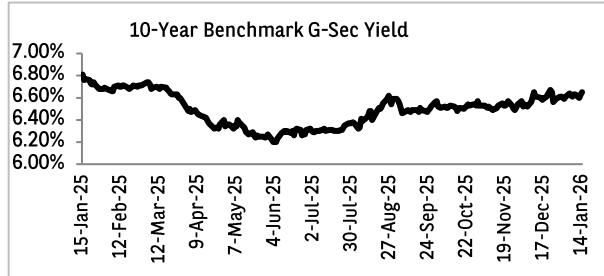
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	427,000	250,000

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, Mospo, 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

Ibarates spot prices
Source: Financial Websites, IBA

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

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