

| Indian Indices | Feb 13 | 1D % Chg | 3M % Chg | 1Y % Chg | PE    |
|----------------|--------|----------|----------|----------|-------|
| BSE Sensex     | 82627  | -1.25    | -2.19    | 8.52     | 22.69 |
| Nifty 50       | 25471  | -1.30    | -1.58    | 10.59    | 22.24 |
| BSE Mid cap    | 45705  | -1.68    | -3.17    | 12.06    | NA    |
| Nifty Midcap   | 59438  | -1.71    | -2.07    | 16.82    | 32.55 |
| Nifty Smallcap | 17033  | -1.79    | -6.33    | 6.63     | 30.27 |
| BSE SmallCap   | 49279  | -1.58    | -7.19    | 5.00     | NA    |

Source: BSE, NSE

| Indian Indices | Feb 13 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| BSE Auto       | 62589  | -0.94    | 2.51     | 25.13    |
| BSE Bankex     | 67476  | -0.87    | 3.10     | 20.24    |
| BSE CD         | 58880  | -1.46    | -5.14    | 5.09     |
| BSE CG         | 68243  | -1.16    | -3.43    | 15.71    |
| BSE FMCG       | 18734  | -1.74    | -7.79    | -3.02    |
| BSE Healthcare | 42637  | -1.05    | -4.30    | 3.93     |
| BSE IT         | 31591  | -1.66    | -11.83   | -22.20   |
| BSE Metal      | 39126  | -3.21    | 11.60    | 39.42    |
| BSE Oil & Gas  | 28595  | -1.86    | -1.48    | 20.38    |
| BSE Power      | 6714   | -1.85    | 0.04     | 12.18    |
| BSE Realty     | 6402   | -2.27    | -12.47   | -3.27    |

Source: BSE, NSE

| Global Indices | Feb 13 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| DJIA           | 49501  | 0.10     | 4.31     | 10.71    |
| Nasdaq         | 22547  | -0.22    | -1.42    | 13.04    |
| FTSE 100       | 10446  | 0.42     | 6.51     | 19.19    |
| Nikkei 225     | 56942  | -1.21    | 11.04    | 44.30    |
| Hang Seng      | 26567  | -1.72    | -1.87    | 21.79    |

Source: Financial websites

| Rs. Cr (Equity) | FII Inv Feb 12 | MF Inv Feb 9 | DII Inv Feb 13 |
|-----------------|----------------|--------------|----------------|
| Buy             | 19040          | 10380        | 20606          |
| Sell            | 18137          | 10773        | 15052          |
| Net             | 903            | -393         | 5554           |
| Net (YTD)       | -14023         | 37212        | 72105          |

Source: NSDL, NSE

| Debt Market Indicators    | Feb 13  | 1D Ago  |
|---------------------------|---------|---------|
| Repo Rate                 | 5.25%   | 5.25%   |
| Call Rate                 | 5.05%   | 4.60%   |
| 10 Yr Gilt^               | 6.68%   | 6.69%   |
| 91-day T-bill^            | 5.27%   | 5.28%   |
| 182-day T Bill^           | 5.47%   | 5.52%   |
| 364-day T Bill^           | 5.54%   | 5.55%   |
| 3-mth CP rate             | 7.35%   | 7.45%   |
| 6-mth CP rate             | 7.40%   | 7.50%   |
| 1-yr CP rate              | 7.30%   | 7.35%   |
| 3-mth CD rate             | 6.70%   | 6.85%   |
| 6-mth CD rate             | 6.92%   | 6.99%   |
| 12-mth CD rate            | 6.82%   | 6.90%   |
| 5 yr Corp Bond            | 7.19%   | 7.23%   |
| Net LAF o/s (Rs Cr)*      | -311215 | -294605 |
| M3 supply (Rs lakh Cr)**  | 299.04  | 295.03  |
| G-sec Volume (Rs Cr)      | 47815   | 72110   |
| SDF*                      | 440116  | 424012  |
| 1 Year OIS                | 5.50%   | 5.50%   |
| US 10-year Treasury Yield | 4.04%   | 4.09%   |

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

\*\*Jan 31 and Jan 14 respectively

## ► Indian Equity

- Indian equity benchmarks closed lower on Friday, owing to a sharp sell-off in information technology (IT) stocks amid rising concerns over artificial intelligence (AI)-led disruption.
- The top losers were Hindalco, Hindustan Unilever, Eternal, Adani Enterprises and ONGC, down 3.20-6.08%.
- The top gainers were Bajaj Finance, Eicher Motors, SBI Life Insurance, SBI and Cipla, up 0.13-3.09%.

## ► Global Equity

- Wall Street stocks ended mixed on Friday with Dow Jones gaining due to cooler inflation data while Nasdaq ended lower dragged down by technology and communication stocks from persistent concerns over AI-led disruption.
- FTSE index ended marginally higher on Friday supported by expectations of monetary policy easing.
- Strait Times Index ended lower on Friday, weighed down by stock-specific losses.
- Nikkei Index closed lower on Friday, due to losses in technology stocks.
- Hang Seng Index closed lower on Friday, owing to renewed concerns that AI could disrupt business models across multiple industries.
- At 8.30 AM, Asian Markets were mostly trading lower.

## ► Indian Debt

- The interbank call-money rate ended higher at 5.05% on Friday compared to 4.60% on Thursday.
- Government bond prices were flat on Friday as demand-supply worries resurfaced after a brief boost from a debt switch.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.68% on Friday.

## ► Capital Market

- Attero Recycling plans to invest around Rs 7,000 crore over the next five years in refining and processing facilities under the Centre's proposed rare-earth and critical mineral corridor plan.
- KLA signed an agreement with Tamil Nadu's government to invest approximately Rs 3,600 crore to establish a global R&D and innovation hub in Chennai.
- Transrail Lighting announced that it has won new EPC contracts worth Rs 2,350 crore in the domestic market.
- Indian Railways has collaborated with Jindal Stainless to produce stainless steel containers for salt in India.

## ► Regulatory

- The Reserve Bank of India has allowed lenders to fund up to 20% of their capital for these deals opening new credit growth avenues for Indian banks.
- The Securities and Exchange Board of India floated a consultation paper proposing a comprehensive review of base price determination and price band norms for exchange-traded funds (ETFs), citing concerns over misalignment with underlying assets and operational risks under the existing framework.

## ► Economy and Government

- India's foreign exchange reserves declined to \$717.06 billion as of February 6, down from \$723.77 billion recorded in the previous week.
- Commerce and Industry Minister Piyush Goyal said that the trade agreement between India and the United States (US) is expected to boost agricultural exports and generate stronger demand for farm produce, which will result in higher prices and prosperity for farmers.
- The government approved the second tranche of Startup India Fund of Funds Scheme with a corpus of Rs 10,000 crore.
- The government approved exports of 2.5 million tonnes of wheat and an additional 500,000 tonnes each of wheat products and sugar, lifting a ban imposed on wheat more than three years ago.

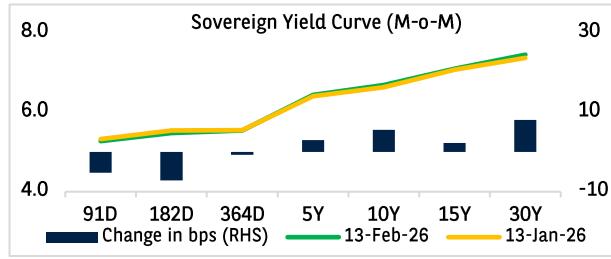
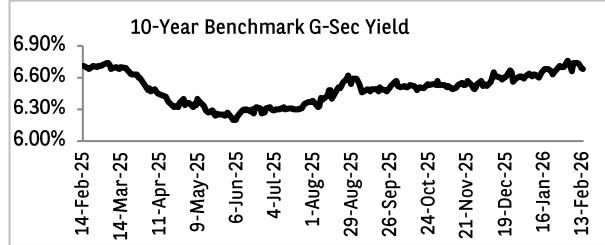
| Borrowing (in Rs cr) | Total   | Completed | Balance |
|----------------------|---------|-----------|---------|
| FY 2025              | 677,000 | 583,000   | 94,000  |

Source: RBI

| Yields (%) | G-sec* | AAA  | AA+  | AA   | AA-  | A+   |
|------------|--------|------|------|------|------|------|
| 6-mth      | 5.47   | 7.12 | 7.86 | 7.91 | 9.14 | 9.62 |
| 1-Yr       | 5.70   | 6.97 | 7.71 | 7.76 | 8.99 | 9.47 |
| 3-Yr       | 5.95   | 7.12 | 7.86 | 7.91 | 9.14 | 9.62 |
| 5-Yr       | 6.43   | 7.19 | 8.03 | 8.08 | 9.31 | 9.79 |
| 10-Yr      | 6.68   | 7.35 | 8.19 | 8.24 | 9.47 | 9.95 |

G-sec and corporate bonds data as of Feb 13

\* Weighted average yields; Source: CRISIL



## Economic Indicators

| YoY (%)                   | Current                | Quarter Ago            | Year Ago               |
|---------------------------|------------------------|------------------------|------------------------|
| Monthly Inflation (CPI)   | 2.75%<br>(Jan'26)      | 0.25%<br>(Oct'25)      | 4.26%<br>(Jan'25)      |
| IIP                       | 7.8%<br>(Dec'25)       | 4.6%<br>(Sep'25)       | 3.7%<br>(Dec'24)       |
| GDP                       | 8.2%<br>(Jul-Sep FY26) | 7.8%<br>(Apr-Jun FY26) | 5.6%<br>(Jul-Sep FY25) |
| GST Collection (in Rs cr) | 1,74,550<br>(Dec-25)   | 1,89,017<br>(Sep-25)   | 1,76,857<br>(Dec-24)   |

Source: CRISIL, Mospo, Financial Websites

| Commodity Prices                | Feb 13 | 1D Ago | 3M Ago | 1Y Ago |
|---------------------------------|--------|--------|--------|--------|
| London Brent Crude Oil (\$/bbl) | 67.75  | 67.52  | 63.01  | 75.02  |
| NYMEX Crude Oil (\$/bbl)        | 62.89  | 62.84  | 58.69  | 71.29  |
| Gold (Rs / 10 gm) #             | 152765 | 155650 | 126554 | 85748  |
| # ibjارات spot prices           |        |        |        |        |

Source: Financial Websites, IBIA

| Currencies Vs INR      | Feb 13 | Feb 12 |
|------------------------|--------|--------|
| USD                    | 90.74  | 90.59  |
| GBP                    | 123.45 | 123.36 |
| Euro                   | 107.62 | 107.45 |
| 100 Yen                | 59.20  | 59.10  |
| Forex Reserve (\$ bn)* | 717.06 | 723.77 |
| Dollar Index           | 96.88  | 96.93  |

\*Data pertains to Feb 6 and to Jan 30 respectively

Source: RBI, Financial Websites

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