

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.

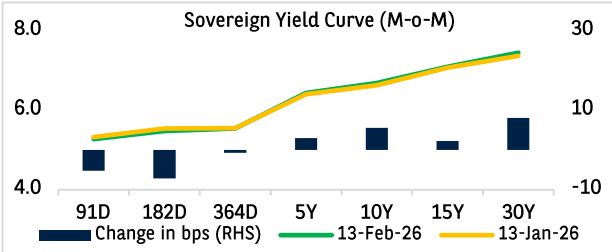
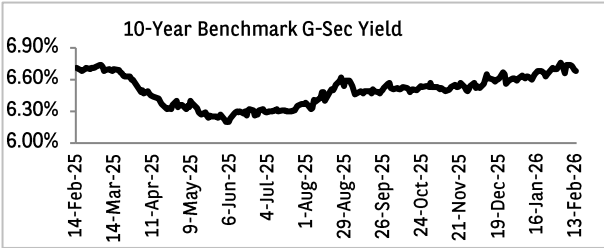
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	583,000	94,000

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% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'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, Mospil, 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

ibjarares 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

International

- US annual inflation rate slowed to 2.4% in January 2026, compared to 2.7% in December 2025 while the annual core consumer price inflation rate edged down to 2.5% from 2.6%.
- The Eurozone economy expanded by 1.3% year-on-year in the fourth quarter of 2025, compared to 1.4% in the third quarter of 2025.
- Eurozone trade surplus narrowed to €12.6 billion in December 2025 compared to €13.9 billion a year earlier as imports grew faster than exports, pointing to softer external balance despite rising trade activity.
- China Outstanding loans growth eased to 6.1% in January 2026 compared to 6.4% in December 2025.
- The Japanese economy grew at an annualized pace of 0.2% in Q4 2025, compared to a revised 2.6% contraction in the previous quarter.

Commodities

- Crude oil prices rose marginally by 5 cents to \$62.89 a barrel on the NYMEX after softer U.S. inflation data supported sentiment, offsetting concerns that OPEC+ may resume production increases.

Baroda BNP Paribas Asset Management India Pvt. Ltd.
(Formerly BNP Paribas Asset Management India Pvt. Ltd.),
Registered Office: Crescenzo, 2nd Floor, 201, Awing, G-Block, Bandra Kurla Complex, Mumbai - 400051
CIN: U74120MH2011PTC225365, Toll Free Number: 1800 - 2670 - 189 | Email: service@barodabnpbaribasmf.in

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