

Indian Indices	Mar 13	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74564	-1.93	-12.55	1.00	20.47
Nifty 50	23151	-2.06	-11.12	3.37	20.26
BSE Mid cap	42154	-2.69	-9.30	7.91	NA
Nifty Midcap	54761	-2.65	-9.16	13.79	30.47
Nifty Smallcap	15895	-2.51	-8.60	6.70	28.33
BSE SmallCap	45165	-2.80	-11.25	3.01	NA

Source: BSE, NSE

Indian Indices	Mar 13	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53877	-3.27	-12.89	16.50
BSE Bankex	60463	-2.44	-9.30	9.31
BSE CD	55012	-2.36	-8.21	4.00
BSE CG	67620	-2.99	1.26	17.08
BSE FMCG	17573	-0.77	-12.23	-6.63
BSE Healthcare	42788	-2.06	-2.94	8.89
BSE IT	28152	-1.73	-23.92	-20.47
BSE Metal	37269	-4.83	6.80	25.30
BSE Oil & Gas	26864	-2.30	-3.98	13.57
BSE Power	6922	-1.91	6.22	12.56
BSE Realty	5521	-1.44	-19.77	-11.34

Source: BSE, NSE

Global Indices	Mar 13	1D % Chg	3M % Chg	1Y % Chg
DJIA	46558	-0.26	-3.92	14.08
Nasdaq	22105	-0.93	-4.70	27.75
FTSE 100	10261	-0.43	6.34	20.12
Nikkei 225	53820	-1.16	5.87	46.29
Hang Seng	25466	-0.98	-1.97	8.54

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 12	MF Inv Mar 10	DII Inv Mar 13
Buy	16082	13312	22708
Sell	23457	8571	12730
Net	-7375	4741	9977
Net (YTD)	-63786	88082	171122

Source: NSDL, NSE

Debt Market Indicators	Mar 13	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.15%	4.70%
10 Yr Gilt^	6.67%	6.67%
91-day T-bill^	5.35%	5.33%
182-day T Bill^	5.53%	5.52%
364-day T Bill^	5.61%	5.61%
3-mth CP rate	7.70%	7.55%
6-mth CP rate	7.80%	7.67%
1-yr CP rate	7.47%	7.31%
3-mth CD rate	7.30%	7.22%
6-mth CD rate	7.43%	7.30%
12-mth CD rate	7.07%	7.00%
5 yr Corp Bond	7.38%	7.34%
Net LAF o/s (Rs Cr)*	-255021	-246636
M3 supply (Rs lakh Cr)**	302.98	298.55
G-sec Volume (Rs Cr)	33630	49595
SDF*	371547	363162
1 Year OIS	5.84%	5.75%
US 10-year Treasury Yield	4.28%	4.27%

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

**Feb 15 and Jan 31 respectively

Indian Equity

- Indian equity benchmarks extended their losses for the third day on Friday, as the rising geopolitical tensions kept crude oil prices above \$100 per barrel, fuelling concerns about inflation and economic growth.
- The top losers were Larsen & Toubro, Hindalco Industries, Tata Steel, JSW Steel and Grasim Industries, down 3.86-7.38%.
- The top gainers were Tata Consumer Products, Hindustan Unilever and Bharti Airtel, up 0.09-2.29%.

Global Equity

- Wall Street stocks closed lower on Friday dragged down by volatile oil prices and concerns over the Middle East tensions.
- FTSE index declined on Friday as the Middle East Conflict fuelled inflation concerns and clouded the Bank of England policy outlook.
- Strait Times Index ended lower on Friday, dragged down by elevated crude oil prices and the continued closure of the Strait of Hormuz.
- Nikkei Index was weaker at close on Friday, as rising uncertainties in the Middle East pushed up oil prices, increasing worries about inflation.
- Hang Seng Index closed lower on Friday due to a rise in crude oil prices amid the ongoing conflict in the Middle East.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended higher at 5.15% on Friday compared to 4.70% on Thursday.
- Government bond prices fell on Friday as surging Brent crude oil prices amid escalating Middle East tensions heightened inflation concerns for India.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.68% on Friday compared to 6.66% on Thursday.

Capital Market

- Godrej Properties' promoters increased their stake in the company by 5% this fiscal through purchases of public shares worth Rs 2,674 crore in the open market.
- Tata Motors secured cumulative orders for more than 5,000 buses and bus chassis from multiple state transport undertakings (STUs) across India, strengthening its position in the public transport segment.

Regulatory

- Sebi introduced a framework allowing mutual funds to use intraday borrowing to manage temporary liquidity mismatches, effective April 1, 2026.

Economy and Government

- Fitch Ratings raised India's GDP growth forecast for current fiscal and the next to 7.5% and 6.7%, and projected global crude oil price to average \$70/barrel in 2026.
- Prime Minister Narendra Modi virtually unveiled projects worth over Rs 4,570 crore in Assam's Kokrajhar district.
- Union Finance Minister Nirmala Sitharaman proposed setting up an Economic Stabilisation Fund to create fiscal headroom, enabling India to respond more effectively to global economic headwinds.
- Commerce and Industry Minister Piyush Goyal said the free-trade agreement (FTA) between India and the United Kingdom (UK) will come into force in a month.
- The commerce ministry said India and the US remain engaged in discussions for a mutually beneficial bilateral trade agreement.
- The government in a reprieve for electric truck and bus makers has extended by six months localisation requirements for claiming incentives under the PM e-drive scheme, permitting companies to import traction motors that use rare earth magnets till September 1, 2026.
- The Uttar Pradesh government acquired over 24,000 acres in Bundelkhand's arid zone to accelerate industrial development in the region.

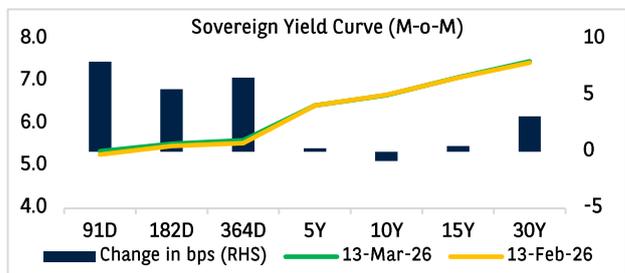
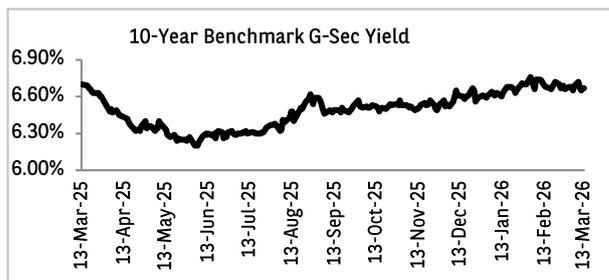
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.53	7.65	8.39	8.44	9.67	10.15
1-Yr	5.78	7.33	8.07	8.12	9.35	9.83
3-Yr	6.06	7.34	8.08	8.13	9.36	9.84
5-Yr	6.43	7.38	8.22	8.27	9.50	9.98
10-Yr	6.67	7.50	8.34	8.39	9.62	10.10

G-sec and corporate bonds data as of Mar 13

* Weighted average yields; Source: CRISIL



International

- The US economy expanded an annualized 0.7% in Q4 2025 compared to 4.4% expansion in Q3 2025.
- US PCE price index measured by the BEA rose 2.8% in January 2026, compared to 2.9% in the previous month while the core PCE price index rose to 3.1% in January of 2026 from 3%.
- Eurozone industrial production fell 1.2% in January 2026 compared to a upwardly revised 2.2% in December 2025.
- UK construction output fell 0.2% year-on-year in January 2026, compared to a 0.3% decline in December 2025.
- The UK recorded a trade surplus of £3.92 billion in January 2026, compared to a £4.34 billion deficit in the previous month.
- UK GDP expanded 0.8% year-on-year in January 2026, compared to a 0.7% rise in December 2025.
- UK Industrial Production increased 0.4% in January 2026 compared to 0.5% rise in December 2025.
- China industrial production rose 6.3% in the combined January-February period of 2026, compared to a 5.2% growth in December 2025.
- China new home prices across 70 cities dropped 3.2% year-on-year in February 2026, compared to a 3.1% decline in the previous month.
- China retail sales rose 2.8% year-on-year in the first two months of 2026, compared to a 0.9% gain in December 2025.

Commodities

- Crude oil prices rose by \$3.01 to \$98.71 a barrel on the NYMEX as the continued closure of the Strait of Hormuz heightened concerns over potential oil supply disruptions.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.21% (Feb'26)	0.71% (Nov'25)	3.61% (Feb'25)
IIP	4.8% (Jan'26)	8.0% (Dec'25)	5.2% (Jan'25)
GDP	7.8% (Oct-Dec FY'26)	8.4% (Jul-Sep FY'26)	7.4% (Oct-Dec FY'25)
GST Collection (in Rs cr)	1,83,609 (Feb-26)	1,93,384 (Nov-25)	1,69,779 (Feb-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Mar 13	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	103.14	100.46	61.12	69.88
NYMEX Crude Oil (\$/bbl)	98.71	95.7	57.44	66.55
Gold (Rs / 10 gm)#	158399	160303	132710	86843

ibjarates spot prices

Source: Financial Websites, IBIJA

Currencies Vs INR	Mar 13	Mar 12
USD	92.44	92.35
GBP	123.20	123.47
Euro	106.31	106.62
100 Yen	57.99	58.07
Forex Reserve (\$ bn)*	716.81	728.49
Dollar Index	100.50	99.72

*Data pertains to Mar 6 and to Feb 27 respectively

Source: RBI, Financial Websites

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@barodabnp-paribasmf.in

Disclaimer:

This report is meant only for the information, Baroda BNP Paribas Asset Management India Private Limited (formerly BNP Paribas Asset Management India Private Limited) ("AMC") and shall not, under any circumstances, be construed as any form of outlook of the AMC on the equity, debt, or other securities markets or as a solicitation or advertisement for investing in any scheme of Baroda BNP Paribas Mutual Fund. All data and information contained in this report are provided by CRISIL Research, a division of CRISIL Limited (CRISIL) and have been prepared using publicly available information, including data developed in-house. CRISIL and the AMC does not take any responsibility with regard to the completeness, accuracy or usefulness of the data provided in this report. CRISIL, the AMC and/or any of either entities' directors, employees or agents, and the Trustees to Baroda BNP Paribas Mutual Fund circumstances, be held responsible for any inaccuracy, error, omission or staleness in the data or information contained in this report or be held liable for any loss or damage caused by any person's reliance on the contents of this report. It is the responsibility of the users of this report to evaluate the completeness, accuracy or usefulness of any data or information contained in this report and such users are advised to consult their own advisors on the implications of investing or dealing in mutual funds or other securities to which the contents of this report may be related. "Mutual Fund investments are subject to market risks, read all scheme related documents carefully"

Crissil Intelligence, a division of Crissil Limited ("Crissil") has taken due care and caution in preparing this report ("Report") based on the information obtained by Crissil from sources which it considers reliable ("Data"). However, Crissil does not guarantee the accuracy, adequacy or completeness of the Data or Report and is not responsible for any errors or omissions or for the results obtained from the use of Data or Report. The Report is not a recommendation to invest or disinvest in any company whether covered or not in the Report and no part of the Report should be construed as an investment advice or any form of investment banking. Crissil especially states that it has no liability whatsoever, financial or otherwise, to the subscribers/ users/ transmitters/ distributors of this Report. Crissil Intelligence operates independently of, and does not have access to information obtained by Crissil's Ratings Division / Crissil Risk and Infrastructure Solutions Limited ("CRIS"), which may, in their regular operations, obtain information of a confidential nature. The views expressed in the Report are that of Crissil Intelligence and not of Crissil's Ratings Division / CRIS. The Report is confidential to the client. No part of this Report may be distributed, copied, reproduced or published (together, "Redistribute") without Crissil's prior written consent, other than as permitted under a formal Agreement (if any) in place between the client and Crissil. Where Crissil gives such consent, the Client shall ensure that the recipient so permitted is responsible to ensure compliance with all applicable laws and regulations with respect to any such Redistribution. Without limiting the generality of the foregoing, nothing in the Report is to be construed as Crissil providing or intending to provide any services in jurisdictions where Crissil does not have the necessary permission and/or registration to carry out its business activities in this regard. The Client will be responsible for ensuring compliances and any consequences of non-compliances for use and access of the Report or part thereof outside India.

The purpose and use of the Report must only be as per the proposal shared by Crissil, or letter of engagement or formal agreement in place between the client and Crissil, as applicable.