

Indian Indices	Apr 15	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	78111	1.64	-6.32	1.79	21.46
Nifty 50	24231	1.63	-5.59	3.87	21.27
BSE Mid cap	45263	2.20	-1.85	9.09	NA
Nifty Midcap	58778	2.20	-1.66	13.09	36.34
Nifty Smallcap	17156	2.35	-1.46	6.04	29.23
BSE SmallCap	49572	2.56	-0.71	4.87	NA

Source: BSE, NSE

Indian Indices	Apr 15	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58408	1.61	-5.16	22.66
BSE Bankex	63408	1.18	-5.62	5.91
BSE CD	59511	2.84	-2.21	5.71
BSE CG	73726	2.54	13.87	21.47
BSE FMCG	17883	1.53	-6.54	-11.80
BSE Healthcare	43234	1.71	-0.30	4.75
BSE IT	30371	2.78	-16.87	-7.66
BSE Metal	41336	1.68	7.48	44.92
BSE Oil & Gas	26927	2.20	-2.55	8.08
BSE Power	7562	2.87	18.96	13.75
BSE Realty	6014	2.51	-9.24	-7.09

Source: BSE, NSE

Global Indices	Apr 15	1D % Chg	3M % Chg	1Y % Chg
DJIA	48464	-0.15	-1.98	20.05
Nasdaq	24016	1.59	2.07	42.76
FTSE 100	10560	-0.47	3.13	28.01
Nikkei 225	58134	0.44	7.44	69.65
Hang Seng	25947	0.29	-3.63	20.87

Source: Financial websites

Rs. Cr (Equity)	FI Inv Apr 13	MF Inv Apr 7	DII Inv Apr 15
Buy	15739	17088	18500
Sell	17174	11601	19069
Net	-1435	5487	-569
Net (YTD)	-176997	171738	281402

Source: NSDL, NSE

Debt Market Indicators	Apr 15	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.08%	5.10%
10 Yr Gilt^	6.88%	6.94%
91-day T-bill^	5.20%	5.28%
182-day T Bill^	5.48%	5.49%
364-day T Bill^	5.57%	5.59%
3-mth CP rate	6.45%	6.51%
6-mth CP rate	7.07%	7.17%
1-yr CP rate	7.30%	7.35%
3-mth CD rate	6.08%	6.09%
6-mth CD rate	6.67%	6.80%
12-mth CD rate	6.92%	6.97%
5 yr Corp Bond	7.51%	7.62%
Net LAF o/s (Rs Cr)*	-522478	-533624
M3 supply (Rs lakh Cr)**	301.93	302.98
G-sec Volume (Rs Cr)	67380	56260
SDF*	400201	441668
1 Year OIS	5.76%	5.84%
US 10-year Treasury Yield	4.29%	4.26%

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

**Mar 15 and Feb 28 respectively

Indian Equity

- Indian equity benchmarks closed higher on Wednesday, supported by falling oil prices and renewed optimism surrounding potential negotiations aimed at ending the conflict in West Asia.
- The top gainers were InterGlobe Aviation, Power Grid Corporation of India, Eternal, Max Healthcare Institute and Wipro, up 3.46-4.35%.
- The top losers were Dr. Reddy's Laboratories, Bharti Airtel, ICICI Bank, Axis Bank, and Oil and Natural Gas Corporation, down 0.02-1.23%.

Global Equity

- Wall Street stocks closed mixed on Wednesday with Nasdaq edging up on strong buying in tech stocks driven by optimism around earnings and easing geopolitical fears while Dow Jones slipped due to sector specific losses.
- FTSE index closed lower on Wednesday dragged down by losses in healthcare and consumer stocks along with caution over Middle East developments.
- Strait Times Index ended higher on Wednesday, due to stock-specific gains amid mixed global cues.
- Nikkei Index ended higher on Wednesday, as hopes of renewed negotiations to end the conflict in West Asia eased uncertainties and lowered crude oil prices.
- Hang Seng Index closed higher on Wednesday, due to renewed optimism over potential negotiations to end the conflict in West Asia and falling crude oil prices.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended lower at 5.08% on Wednesday compared to 5.10% on Monday.
- Government bond prices ended higher on Wednesday due to easing Brent crude oil prices on expectations of renewed US-Iran talks.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.87% on Wednesday compared to 6.94% on Monday.

Capital Market

- RailTel Corporation secured a Rs 255.27 crore order from Rail Vikas Nigam Ltd. (RVNL) for supplying, installing, testing, and commissioning integrated tunnel communication systems.
- Wipro plans to acquire select customer contracts of Alpha Net Consulting at a purchase consideration of up to \$70.8 million.
- Accel has secured \$5 billion in new funding, allocating \$4 billion of that amount to its fifth Leaders Fund, which is focused on supporting late-stage artificial intelligence startups.
- Axiro Semiconductor invested in Japanese fabless semiconductor company EdgeCortex, specialising in energy-efficient AI processing.
- ReNew Energy Global Plc commissioned record 2.4 GW of assets in FY2026, taking its total operating capacity to 12.6GW, the second largest in the country.

Regulatory

- The Reserve Bank provided operational flexibility to non-banking financial companies (NBFCs) by allowing them to open branches without prior approval in most cases while imposing certain conditions for deposit-taking entities based on net owned funds.

Economy and Government

- India merchandise trade deficit narrowed sharply to \$20.67 billion in March 2026, after escalating tensions involving Iran raised fresh risks for exports and energy imports.
- India merchandise exports rose to \$38.92 billion in March 2026 compared to \$36.61 billion in February 2026, while imports fell to \$59.9 billion from \$63.71 billion.
- India wholesale inflation rose to 3.88% year-on-year in March 2026, compared to 2.13% in February 2026, driven by higher prices of crude, power and manufactured goods amid the West Asia war.

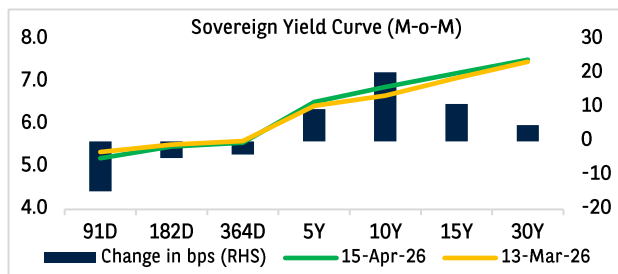
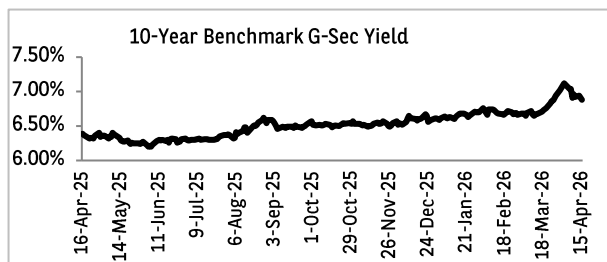
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	63,000	757,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.48	6.94	7.68	7.73	8.96	9.44
1-Yr	5.80	7.31	8.05	8.10	9.33	9.81
3-Yr	6.32	7.39	8.13	8.18	9.41	9.89
5-Yr	6.53	7.51	8.35	8.40	9.63	10.11
10-Yr	6.88	7.60	8.44	8.49	9.72	10.20

G-sec and corporate bonds data as of Apr 15

* Weighted average yields; Source: CRISIL



International

- Eurozone industrial production contracted by 0.6% year-over-year in February 2026, unchanged from the previous month.
- China new home prices across 70 cities fell 3.4% year-on-year in March 2026, compared to a 3.2% decline in February 2026.
- The Chinese economy expanded 5.0% in Q1 2026, accelerating compared to 4.5% in Q4 2025.
- China industrial production grew 5.7% year-on-year in March 2026, compared to a 6.3% rise in the combined January–February period.
- China retail sales rose 1.7% year-on-year in March 2026, compared to a 2.8% increase in the January–February period.
- China urban unemployment rate rose to 5.4% in March 2026 compared to 5.3% in February 2026.

Commodities

- Crude oil prices were steady at \$91.29 a barrel on the NYMEX as supply disruption concerns balanced optimism over a potential end to the US-Iran conflict and easing Strait of Hormuz tensions.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.40% (Mar'26)	1.33% (Dec'25)	3.34% (Mar'25)
IIP	5.2% (Feb'26)	7.2% (Nov'25)	2.7% (Feb'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)	2,00,064 (Mar-26)	1,74,550 (Dec-25)	1,96,141 (Mar-25)

Source: CRISIL, Mospil, Financial Websites

Commodity Prices	Apr 15	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	94.93	94.79	63.76	64.67
NYMEX Crude Oil (\$/bbl)	91.29	91.28	59.19	61.33
Gold (Rs / 10 gm)#	152865	150011	142015	93102

ibjarates spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Apr 15	Apr 13
USD	93.39	93.37
GBP	126.69	125.22
Euro	110.12	109.15
100 Yen	58.76	58.49
Forex Reserve (\$ bn)*	697.12	688.06
Dollar Index	98.06	98.12

*Data pertains to Apr 3 and to Mar 27 respectively

Source: RBI, Financial Websites

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