

Indian Indices	Feb 16	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83277	0.79	-1.52	9.66	22.87
Nifty 50	25683	0.83	-0.88	12.01	22.51
BSE Mid cap	45988	0.62	-2.54	15.75	NA
Nifty Midcap	59723	0.48	-1.67	20.28	32.56
Nifty Smallcap	17051	0.11	-6.58	10.67	30.39
BSE SmallCap	49081	-0.40	-7.62	8.08	NA

Source: BSE, NSE

Indian Indices	Feb 16	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	62092	-0.79	2.26	25.91
BSE Bankex	68283	1.20	4.01	22.32
BSE CD	59351	0.80	-4.73	8.53
BSE CG	68957	1.05	-2.57	20.24
BSE FMCG	18844	0.59	-7.75	-2.02
BSE Healthcare	42980	0.80	-3.75	7.75
BSE IT	31617	0.08	-10.72	-22.08
BSE Metal	39411	0.73	13.40	42.68
BSE Oil & Gas	28849	0.89	-0.07	23.54
BSE Power	6875	2.40	2.20	18.00
BSE Realty	6494	1.44	-11.21	0.16

Source: BSE, NSE

Global Indices	Feb 16	1D % Chg	3M % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA
Nasdaq	Closed	NA	NA	NA
FTSE 100	10474	0.26	7.99	19.94
Nikkei 225	56806	-0.24	12.76	45.10
Hang Seng	26706	0.52	0.50	18.06

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 13	MF Inv Feb 12	DII Inv Feb 16
Buy	16395	13896	13121
Sell	22488	14168	11454
Net	-6093	-271	1667
Net (YTD)	-20116	37246	73772

Source: NSDL, NSE

Debt Market Indicators	Feb 16	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.60%	5.05%
10 Yr Gilt^	6.67%	6.68%
91-day T-bill^	5.30%	5.27%
182-day T Bill^	5.47%	5.47%
364-day T Bill^	5.54%	5.54%
3-mth CP rate	7.40%	7.35%
6-mth CP rate	7.40%	7.40%
1-yr CP rate	7.30%	7.30%
3-mth CD rate	6.98%	6.70%
6-mth CD rate	6.90%	6.92%
12-mth CD rate	6.84%	6.82%
5 yr Corp Bond	7.19%	7.19%
Net LAF o/s (Rs Cr)*	-325312	-326535
M3 supply (Rs lakh Cr)**	299.04	295.03
G-sec Volume (Rs Cr)	55995	47815
SDF*	453713	440116
1 Year OIS	5.49%	5.50%
US 10-year Treasury Yield	NA	4.04%

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

\*\*Jan 28 and Jan 14 respectively

## ► Indian Equity

- Indian equity benchmarks closed higher on Monday, driven by upswings in financial, energy, pharmaceutical and healthcare stocks.
- The top gainers were Power Grid Corporation of India, Coal India, HDFC Bank, Adani Enterprises and Max Healthcare Institute, up 2.03- 4.74%.
- The top losers were Kwality Wall's (India) Limited, Tech Mahindra, Bajaj Finance, Maruti Suzuki India and Tata Motors Passenger Vehicles, down 0.91- 2.01%.

## ► Global Equity

- FTSE index closed higher on Monday supported by gains in defence stocks on expectations of higher UK military spending.
- Strait Times Index ended higher on Monday, dragged down by slower-than-expected export data for January ahead of the Chinese New Year break.
- Nikkei Index closed marginally lower on Monday, dragged down by losses in financial stocks amid weak economic data
- Hang Seng Index closed higher on Monday, supported by strong southbound inflows and expectations of liquidity and policy support from Beijing.
- At 8.30 AM, Asian Markets were mostly trading lower.

## ► Indian Debt

- The interbank call-money rate ended lower at 4.60% on Monday compared to 5.05% on Friday.
- Government bond prices rose on Monday, tracking rally in US bond prices after softer US inflation data and surplus in banking system liquidity.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.66% on Monday compared to 6.68% on Friday.

## ► Capital Market

- Shriram Properties Ltd bought a 4-acre land in Bengaluru to develop a housing project with an expected revenue of about Rs 600 crore.
- Torrent Power Ltd plans to acquire 100% equity and convertible instruments in Nabha Power Ltd from L&T Power Development Ltd.
- In-Solutions Global Ltd (ISG) received regulatory authorisation from the Reserve Bank of India (RBI) across all three Payment Aggregator categories - online, physical or offline and cross-border.
- Motilal Oswal Alternates raised Rs 8,500 crore (\$930 million) for its fifth private equity vehicle, India Business Excellence Fund V (IBEF V), marking its largest-ever PE fund.
- SKF India is set to invest Rs 653 crore in the construction of a new manufacturing facility in Pune.
- EaseMyTrip plans to raise up to Rs 500 crore in capital to support expansion across high-potential segments, particularly in hotels and holidays.

## ► Regulatory

- The Reserve Bank of India's (RBI) drafted norms aimed at curbing mis-selling of financial products could weigh more heavily on the private sector banks given their higher reliance on insurance income.
- SEBI proposed revising how ETFs determine base prices and daily price bands to better reflect real-time market conditions and reduce manual errors.

## ► Economy and Government

- India wholesale prices rose 1.81% year-on-year in January 2026, compared to a 0.83% increase in December 2025.
- India's unemployment rate rose to 5.0% in January 2026 compared to 4.8% in December 2025.
- According to government export and import data India's merchandise trade deficit surged to \$34.68 billion in January 2026 compared to \$25.04 billion in December 2025.

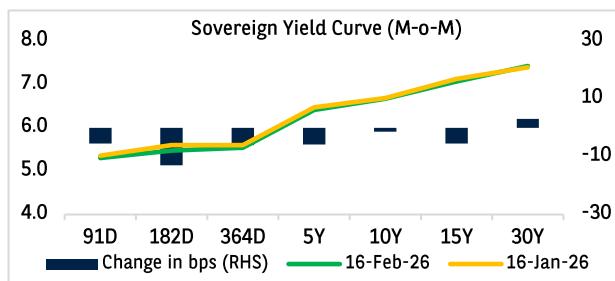
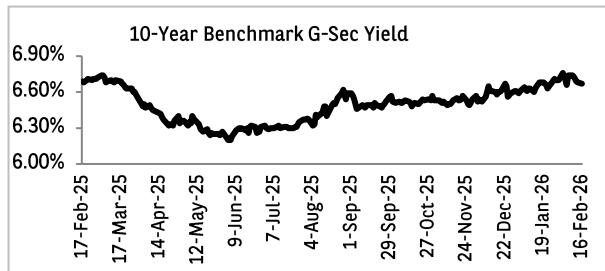
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	583,000	94,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.47	7.16	7.90	7.95	9.18	9.66
1-Yr	5.66	6.95	7.69	7.74	8.97	9.45
3-Yr	5.95	7.08	7.82	7.87	9.10	9.58
5-Yr	6.41	7.19	8.03	8.08	9.31	9.79
10-Yr	6.67	7.35	8.19	8.24	9.47	9.95

G-sec and corporate bonds data as of Feb 16

\* Weighted average yields; Source: CRISIL



## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Feb 16	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Feb 16	Feb 13
Monthly Inflation (CPI)	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)	London Brent Crude Oil (\$/bbl)	68.65	67.75	64.29	74.74	USD	90.71	90.74
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'24)	NYMEX Crude Oil (\$/bbl)	Closed	62.89	59.95	70.74	GBP	123.76	123.45
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)	Gold (Rs / 10 gm) #	154098	152765	124794	85998	Euro	107.65	107.62
GST Collection (in Rs cr)	1,74,550 (Dec-25)	1,89,017 (Sep-25)	1,76,857 (Dec-24)	# ibjirates spot prices					100 Yen	59.24	59.20
				Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	717.06	723.77
									Dollar Index	97.11	96.88

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

Source: RBI, Financial Websites

Source: CRISIL, Mospi, Financial Websites

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