

Indian Indices	Feb 17	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83451	0.21	-1.77	9.81	22.91
Nifty 50	25725	0.17	-1.11	12.05	22.52
BSE Mid cap	46193	0.45	-2.75	15.68	NA
Nifty Midcap	59882	0.27	-1.41	20.12	33.28
Nifty Smallcap	17147	0.56	-6.06	11.25	30.53
BSE SmallCap	49484	0.82	-7.41	9.58	NA

Source: BSE, NSE

Indian Indices	Feb 17	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	62425	0.54	1.92	27.17
BSE Bankex	68658	0.55	3.78	22.67
BSE CD	59853	0.85	-4.42	8.47
BSE CG	69484	0.76	-2.41	21.76
BSE FMCG	19008	0.87	-7.23	-0.91
BSE Healthcare	43190	0.49	-3.82	7.06
BSE IT	31980	1.15	-9.90	-20.65
BSE Metal	39042	-0.93	12.31	40.29
BSE Oil & Gas	28892	0.15	-0.38	22.82
BSE Power	6878	0.05	1.40	17.18
BSE Realty	6479	-0.23	-11.80	0.11

Source: BSE, NSE

Global Indices	Feb 17	1D % Chg	3M % Chg	1Y % Chg
DJIA	49533	0.07	6.32	11.20
Nasdaq	22578	0.14	-0.57	12.74
FTSE 100	10556	0.79	9.10	20.39
Nikkei 225	56566	-0.42	12.40	44.40
Hang Seng	Closed	NA	NA	NA

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 16	MF Inv Feb 13	DII Inv Feb 17
Buy	9820	15887	12483
Sell	10034	12365	12296
Net	-214	3523	187
Net (YTD)	-20330	40769	73959

Source: NSDL, NSE

Debt Market Indicators	Feb 17	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.08%	4.60%
10 Yr Gilt^	6.66%	6.67%
91-day T-bill^	5.27%	5.30%
182-day T Bill^	5.50%	5.47%
364-day T Bill^	5.55%	5.54%
3-mth CP rate	7.45%	7.40%
6-mth CP rate	7.45%	7.40%
1-yr CP rate	7.35%	7.30%
3-mth CD rate	7.00%	6.98%
6-mth CD rate	6.90%	6.90%
12-mth CD rate	6.85%	6.84%
5 yr Corp Bond	7.19%	7.19%
Net LAF o/s (Rs Cr)*	-267132	-325312
M3 supply (Rs lakh Cr)**	299.04	295.03
G-sec Volume (Rs Cr)	50980	55995
SDF*	395533	453713
1 Year OIS	5.50%	5.49%
US 10-year Treasury Yield	4.05%	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 Tuesday, driven by gains in IT after a sector leader announced a collaboration to develop and deploy advanced enterprise AI solutions.
- The top gainers were Adani Enterprises, ITC, Bharat Electronics, Infosys, and Larsen & Toubro, up 1.77-2.74%.
- The top losers were Kwality Wall's India, Hindalco Industries, Eternal, Tata Steel and Trent, down 1.41-5.00%.

## ► Global Equity

- Wall Street stocks closed marginally higher on Tuesday boosted by gains in technology and financial shares.
- FTSE index closed higher on Tuesday supported by signs of a cooling labour market, strengthening expectations of a potential interest rate cut.
- Nikkei Index closed lower on Tuesday, weighed down by losses in sector-specific stocks due to faded post-election optimism.
- At 8.30 AM, Asian Markets were mostly trading higher.

## ► Indian Debt

- The interbank call-money rate ended higher at 5.08% on Tuesday compared to 4.60% on Monday.
- Government bond prices were steady on Tuesday, as robust state debt demand and ample liquidity offset supply concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.66% on Tuesday.

## ► Capital Market

- Adani Group plans to invest \$100 billion to build data centers for artificial intelligence (AI) in India by 2035.
- Black Box Ltd entered into definitive agreements to acquire Brazil-based 2S Inovações Tecnológicas for Rs 275 crore, with completion expected by March 2026 as part of its international expansion and revenue growth plans.
- Infosys announced a strategic collaboration with American artificial intelligence company Anthropic to develop and deploy advanced enterprise AI solutions for companies across telecommunications, financial services, manufacturing, and software development.
- Delhivery Ltd. entered a pact with electric mobility startup RIDEV to deploy 150 electric vehicles to scale green logistics.
- Navikenz raised \$11.6 million in a round led by Sekar PRC, Sudip Nandy with existing investors participating.

## ► Regulatory

- The Insolvency and Bankruptcy Board of India (IBBI) in a discussion paper suggested that the committee of creditors (CoC) record its deliberations on the expected recovery for creditors in comparison with the fair value and liquidation value.

## ► Economy and Government

- NHAI accepted National Highways Infra Trust's offer of Rs 6,220.90 crore for the asset monetisation of two highway sections of 310 kilometres.
- Prime Minister Narendra Modi said India is seeking to position itself as a stabilising force in a world marked by geopolitical churn and economic uncertainty.
- Union Minister announced that India plans to boost its AI computing capabilities by adding 20,000 GPUs, which will increase the total capacity to over 58,000 GPUs, significantly enhancing the country's artificial intelligence infrastructure.

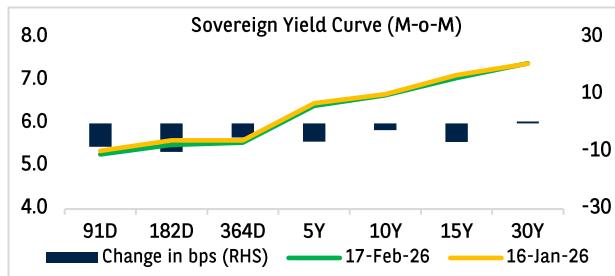
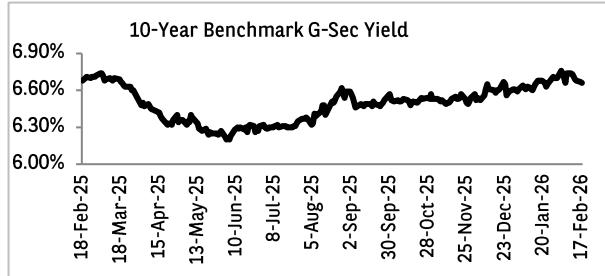
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	583,000	94,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.50	7.17	7.91	7.96	9.19	9.67
1-Yr	5.63	6.95	7.69	7.74	8.97	9.45
3-Yr	5.92	7.08	7.82	7.87	9.10	9.58
5-Yr	6.40	7.19	8.03	8.08	9.31	9.79
10-Yr	6.66	7.35	8.19	8.24	9.47	9.95

G-sec and corporate bonds data as of Feb 17

\* 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)	1,93,384 (Jan-26)	1,95,936 (Oct-25)	1,95,506 (Jan-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Feb 17	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	67.42	68.65	64.2	75.22
NYMEX Crude Oil (\$/bbl)	62.33	Closed	59.91	71.39
Gold (Rs / 10 gm) #	151865	154098	122924	85254

# ibjirates spot prices  
Source: Financial Websites, IBJA

Currencies Vs INR	Feb 17	Feb 16
USD	90.77	90.71
GBP	123.57	123.76
Euro	107.52	107.65
100 Yen	59.38	59.24
Forex Reserve (\$ bn)*	717.06	723.77
Dollar Index	97.22	97.11

\*Data pertains to Feb 6 and to Jan 30 respectively  
Source: RBI, Financial Websites

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