

Indian Indices	Mar 17	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76071	0.75	-10.04	2.56	20.88
Nifty 50	23581	0.74	-8.67	4.76	20.63
BSE Mid cap	42322	0.97	-7.89	7.51	NA
Nifty Midcap	55174	1.02	-7.60	13.85	30.70
Nifty Smallcap	15913	0.65	-7.83	6.31	28.36
BSE SmallCap	45300	0.73	-9.96	3.34	NA

Source: BSE, NSE

Indian Indices	Mar 17	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	55655	2.05	-8.93	19.38
BSE Bankex	61664	0.90	-6.53	10.69
BSE CD	55510	0.70	-7.52	4.59
BSE CG	67944	1.40	2.97	17.10
BSE FMCG	17635	-0.58	-11.99	-6.10
BSE Healthcare	42488	0.43	-2.41	6.93
BSE IT	27841	-0.87	-24.47	-21.42
BSE Metal	38453	2.81	10.62	28.11
BSE Oil & Gas	26278	0.12	-5.96	10.99
BSE Power	6945	0.92	7.86	12.41
BSE Realty	5536	1.79	-17.81	-10.79

Source: BSE, NSE

Global Indices	Mar 17	1D % Chg	3M % Chg	1Y % Chg
DJIA	46993	0.10	-1.86	12.31
Nasdaq	22480	0.47	-0.94	26.23
FTSE 100	10404	0.83	6.44	19.85
Nikkei 225	53700	-0.09	8.46	43.60
Hang Seng	25869	0.13	1.57	7.14

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 16	MF Inv Mar 13	DII Inv Mar 17
Buy	12107	18632	16763
Sell	21513	10929	11537
Net	-9407	7703	5225
Net (YTD)	-84021	103966	188941

Source: NSDL, NSE

Debt Market Indicators	Mar 17	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.30%	5.31%
10 Yr Gilt^	6.71%	6.70%
91-day T-bill^	5.33%	5.34%
182-day T Bill^	5.50%	5.51%
364-day T Bill^	5.60%	5.59%
3-mth CP rate	7.55%	7.67%
6-mth CP rate	7.65%	7.85%
1-yr CP rate	7.50%	7.55%
3-mth CD rate	7.23%	7.36%
6-mth CD rate	7.28%	7.48%
12-mth CD rate	7.12%	7.20%
5 yr Corp Bond	7.42%	7.42%
Net LAF o/s (Rs Cr)*	-82882	-215545
M3 supply (Rs lakh Cr)**	302.98	298.55
G-sec Volume (Rs Cr)	22190	26610
SDF*	199408	332071
1 Year OIS	5.80%	5.85%
US 10-year Treasury Yield	4.20%	4.23%

*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 closed higher on Tuesday on expectations that shipping activity will resume in the Strait of Hormuz.
- The top gainers were Eternal, Tata Steel, Mahindra & Mahindra, HDFC Life and Bharat Electronics Ltd, up 2.67%-5.59%.
- The top losers were Wipro, Cipla, Tata Consumer Products, Infosys and ITC, down 1.23%-2.06%.

Global Equity

- Wall Street stocks ended higher on Tuesday, led by gains in travel stocks, while investors remained cautious ahead of the Federal Reserve policy meeting amid concerns over high oil prices and the Middle East conflict.
- FTSE index closed higher on Tuesday, supported by gains in energy and financial stocks, as investors looked ahead to the Bank of England rate decision.
- Straits Times index closed higher on Tuesday, supported by gains in banking stocks.
- Nikkei index closed lower on Tuesday, as rising oil prices and escalating Middle East conflict heightened concerns over inflation and energy supply disruptions.
- Hang Seng index closed marginally higher on Tuesday, supported by stock-specific gains.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended lower at 5.30% on Tuesday compared to 5.31% on Monday.
- Government bond prices unchanged on Tuesday due to elevated Brent crude oil prices and heavy supply while awaited support from the Reserve Bank of India.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.71% on Tuesday.

Capital Market

- State Bank of India (SBI) raised Rs 6,051 crore at 7.05% through its second Tier 2 bond issuance for the current financial year.
- Svasti Microfinance has raised Rs 47.5 crore from its core investor group.
- Ecofy raised Rs 380.5 crore equity capital to expand its green finance business in the country.
- Drink Prime raised \$2.2 million from Artha Continuum Fund and Mirabilis Investment Trust.

Regulatory

- The Securities and Exchange Board of India (Sebi) proposed easing nomination norms for demat accounts and mutual fund folios to simplify investor onboarding and reduce compliance friction.

Economy and Government

- Union Finance Minister Nirmala Sitharaman said Pradhan Mantri MUDRA Yojana has benefitted many small entrepreneurs and Rs 39.48 lakh crore has been sanctioned since launch of this scheme.
- Finance Minister Nirmala Sitharaman reassured Parliament on India's economic resilience amidst global shocks, detailing supplementary spending for MGNREGA, fertilisers, and MSMEs
- Parliament approved the second batch of supplementary demands for grants, allowing the government to spend an additional Rs 2.01 lakh crore in the current fiscal, with the Rajya Sabha returning the Appropriation Bill 2026 to the Lok Sabha.
- Union Commerce and Industry Minister Piyush Goyal lauded India's growth in global trade, despite the difficulties caused by the ongoing West Asia conflict.
- The Department of Posts rolled out three premium services, with 24-hour and 48-hour delivery guarantees for urgent and time-sensitive consignments.

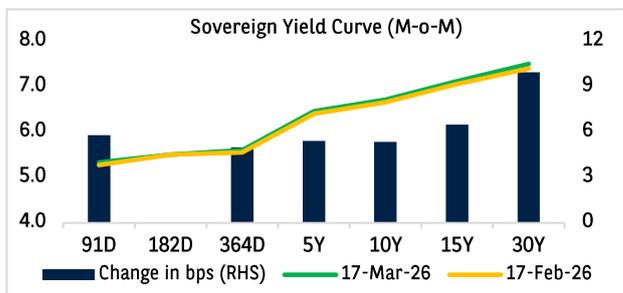
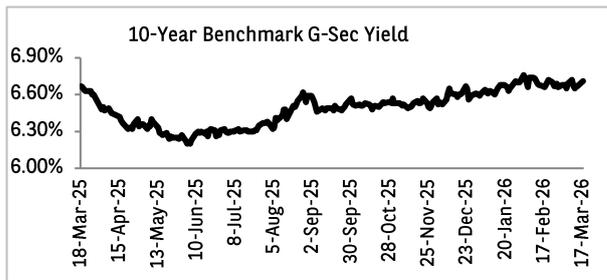
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.50	7.52	8.26	8.31	9.54	10.02
1-Yr	5.75	7.40	8.14	8.19	9.42	9.90
3-Yr	6.12	7.40	8.14	8.19	9.42	9.90
5-Yr	6.46	7.42	8.26	8.31	9.54	10.02
10-Yr	6.71	7.54	8.38	8.43	9.66	10.14

G-sec and corporate bonds data as of Mar 17

* Weighted average yields; Source: CRISIL



International

- US private employers added an average of 9,000 jobs per week in the four weeks ending February 28, 2026, a notable decline from the revised 14,750 jobs per week in the prior period.
- US pending home sales fell 0.8% from the previous year in February of 2026 compared to 0.4% fall in January 2026.
- Eurozone ZEW Indicator of Economic Sentiment fell sharply by 47.9 points to -8.5 in March 2026 compared to 39.4 in February 2026.
- Japan's trade surplus plunged to JPY 57.3 billion in February 2026 from JPY 559.2 billion a year earlier, as import growth outpaced exports.

Commodities

- Crude oil prices rose by \$2.71 to \$96.21 a barrel on the NYMEX as renewed Iranian attacks on the United Arab Emirates heightened concerns over global 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, Mospil, Financial Websites

Commodity Prices	Mar 17	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	103.42	100.21	59.68	71.07
NYMEX Crude Oil (\$/bbl)	96.21	93.5	55.94	67.58
Gold (Rs / 10 gm)#	155668	155714	132317	88101

ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Mar 17	Mar 16
USD	92.46	92.40
GBP	122.83	122.37
Euro	106.10	105.59
100 Yen	57.99	57.99
Forex Reserve (\$ bn)*	716.81	728.49
Dollar Index	99.60	99.89

*Data pertains to Mar 6 and to Feb 27 respectively

Source: RBI, Financial Websites

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