

Indian Indices	Apr 20	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	78520	0.03	-4.45	-0.04	21.56
Nifty 50	24365	0.05	-3.44	2.15	21.39
BSE Mid cap	46042	-0.18	2.71	9.68	NA
Nifty Midcap	59791	-0.18	2.94	13.55	36.87
Nifty Smallcap	17487	-0.45	4.71	6.56	29.79
BSE SmallCap	50630	-0.33	6.10	5.60	NA

Source: BSE, NSE

Indian Indices	Apr 20	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58550	0.18	-2.31	22.21
BSE Bankex	63733	0.02	-4.73	2.31
BSE CD	60484	0.26	4.16	5.89
BSE CG	76533	0.55	22.61	25.23
BSE FMCG	18347	-0.20	-2.62	-10.76
BSE Healthcare	43375	-0.26	4.27	4.02
BSE IT	30455	-0.79	-17.30	-7.56
BSE Metal	42256	-0.38	12.64	47.36
BSE Oil & Gas	27207	0.23	1.13	6.26
BSE Power	7877	1.24	28.50	17.21
BSE Realty	6052	-0.70	-2.05	-7.62

Source: BSE, NSE

Global Indices	Apr 20	1D % Chg	3M % Chg	1Y % Chg
DJIA	49443	-0.01	1.97	26.32
Nasdaq	24404	-0.26	6.32	49.84
FTSE 100	10609	-0.55	4.76	28.20
Nikkei 225	58825	0.60	11.01	69.38
Hang Seng	26361	0.77	-0.48	23.21

Source: Financial websites

Rs. Cr (Equity)	FI Inv Apr 17	MF Inv Apr 16	DII Inv Apr 20
Buy	17308	12893	18753
Sell	15239	15792	15786
Net	2069	-2899	2967
Net (YTD)	-170207	167043	276219

Source: NSDL, NSE

Debt Market Indicators	Apr 20	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.13%	5.11%
10 Yr Gilt^	6.89%	6.90%
91-day T-bill^	5.18%	5.17%
182-day T Bill^	5.48%	5.39%
364-day T Bill^	5.55%	5.52%
3-mth CP rate	6.50%	6.47%
6-mth CP rate	7.05%	7.05%
1-yr CP rate	7.32%	7.31%
3-mth CD rate	6.08%	6.08%
6-mth CD rate	6.67%	6.65%
12-mth CD rate	6.95%	6.94%
5 yr Corp Bond	7.57%	7.57%
Net LAF o/s (Rs Cr)*	-436618	-434178
M3 supply (Rs lakh Cr)**	314.66	301.93
G-sec Volume (Rs Cr)	50120	53600
SDF*	278391	275951
1 Year OIS	5.77%	5.81%
US 10-year Treasury Yield	4.26%	4.26%

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

**Mar 31 and Mar 15 respectively

Indian Equity

- Indian equity benchmarks rose marginally on Monday, reflecting the cautious sentiment of investors regarding mixed signals from global markets and crude price movements amid ongoing geopolitical uncertainties.
- The top gainers were Trent, JSW Steel, State Bank of India, Asian Paints and NTPC, up 1.21% - 3.10%.
- The top losers were Jio Financial Services, Hindalco Industries, Tata Motors Passenger Vehicles, Larsen & Toubro and HDFC Life Insurance Company, down 1.25% - 2.98%.

Global Equity

- Wall Street stocks closed marginally lower on Monday due to renewed US-Iran tensions and doubts over ceasefire.
- FTSE index closed lower on Monday weighed down by fears of a US-Iran ceasefire collapse and a surge in oil prices following disruptions in the Strait of Hormuz.
- Strait Times Index ended marginally higher on Monday due to stock-specific gains amid reports of property deals and small-cap fundraising.
- Nikkei Index ended higher on Monday, driven by optimism over the sectoral growth of artificial intelligence.
- Hang Seng Index closed higher on Monday, after the China's central bank kept key lending rates unchanged and introduced additional market-supportive measures.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call-money rate ended higher at 5.13% on Monday compared to 5.11% on Friday.
- Government bond prices ended almost steady on Monday as investors remained cautious due to elevated crude oil prices and uncertainty over the US-Iran truce expiring this week.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper stood at 6.89% on Monday compared with 6.90% on Friday.

Capital Market

- Apollo Micro Systems secured arms manufacturing license from the Indian government.
- Indian Institute of Technology Kharagpur launched a specialized research facility which will be supported by a financial commitment of Rs 15 crore funds.
- JSW Steel Ltd and POSCO Group have formally approved a 50:50 joint venture to construct a 6 million tonnes per annum integrated steel plant in Odisha.

Regulatory

- The Reserve Bank of India (RBI) has rescinded restrictions on specific categories of rupee derivative transactions that were implemented in April 2025 to combat the Indian rupee's depreciation to historic lows.
- RBI data showed, India's outward foreign direct investment (FDI) rose by 27.5% to \$7.06 billion in March 2026 from \$5.54 billion in the same month last year. Sequentially, it surged from \$2.96 billion in February 2026.

Economy and Government

- India's infrastructure output, comprising eight core sectors, contracted by 0.4% in March from upwardly revised 2.8% in February. For the full financial year 2025-26, cumulative growth in the core sector slowed to 2.6%, compared with 4.5% in 2024-25.
- Union Minister informed that railway projects worth over Rs 90,000 crore are currently under execution in Odisha.
- The rural development ministry reviewed its key schemes considering the West Asia conflict's potential impact on global supply chains, commodity prices, and inflation, particularly affecting low-cost housing and road construction in remote areas.

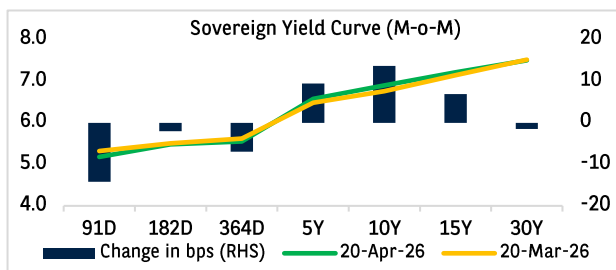
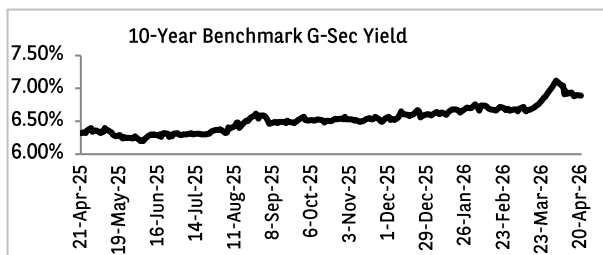
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	95,000	725,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.48	6.87	7.61	7.66	8.89	9.37
1-Yr	5.79	7.22	7.96	8.01	9.24	9.72
3-Yr	6.24	7.46	8.20	8.25	9.48	9.96
5-Yr	6.58	7.57	8.41	8.46	9.69	10.17
10-Yr	6.89	7.62	8.46	8.51	9.74	10.22

G-sec and corporate bonds data as of Apr 20

* Weighted average yields; Source: CRISIL



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, Mospi, Financial Websites

Commodity Prices	Apr 20	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	95.48	90.38	64.92	67.96
NYMEX Crude Oil (\$/bbl)	89.61	83.85	60.36	64.68
Gold (Rs / 10 gm)#	152096	151655	147409	94910

ibjarates spot prices

Source: Financial Websites, IBIJA

Currencies Vs INR	Apr 20	Apr 17
USD	93.07	92.72
GBP	125.51	125.27
Euro	109.36	109.20
100 Yen	58.55	58.14
Forex Reserve (\$ bn)*	700.95	697.12
Dollar Index	98.05	98.10

*Data pertains to Apr 10 and to Apr 3 respectively

Source: RBI, Financial Websites

International

- Eurozone construction output has contracted by 1.9% year-over-year in February 2026, extending the sector's downward trend following a steeper 4.1% decline in January 2026.

Commodities

- Crude oil prices rose by \$5.76 to \$89.61 a barrel on the NYMEX as disruptions in the Strait of Hormuz and uncertainty over US-Iran peace talks heightened fears of supply shortages.

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

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