

| Indian Indices | Apr 21 | 1D % Chg | 3M % Chg | 1Y % Chg | PE |
|----------------|--------|----------|----------|----------|-------|
| BSE Sensex | 79273 | 0.96 | -3.22 | -0.17 | 21.77 |
| Nifty 50 | 24577 | 0.87 | -2.31 | 1.87 | 21.45 |
| BSE Mid cap | 46366 | 0.70 | 4.48 | 8.07 | NA |
| Nifty Midcap | 60087 | 0.49 | 4.64 | 11.32 | 36.97 |
| Nifty Smallcap | 17642 | 0.88 | 6.59 | 5.18 | 29.97 |
| BSE SmallCap | 50984 | 0.70 | 7.70 | 4.59 | NA |

Source: BSE, NSE

| Indian Indices | Apr 21 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| BSE Auto | 58797 | 0.42 | -1.57 | 20.18 |
| BSE Bankex | 64663 | 1.46 | -2.43 | 1.96 |
| BSE CD | 60540 | 0.09 | 5.57 | 4.54 |
| BSE CG | 76490 | -0.06 | 23.68 | 22.83 |
| BSE FMCG | 18756 | 2.23 | 0.25 | -8.08 |
| BSE Healthcare | 43445 | 0.16 | 5.04 | 3.52 |
| BSE IT | 30634 | 0.59 | -16.47 | -9.11 |
| BSE Metal | 42281 | 0.06 | 12.12 | 44.56 |
| BSE Oil & Gas | 27281 | 0.27 | 1.20 | 3.83 |
| BSE Power | 7912 | 0.44 | 29.37 | 14.86 |
| BSE Realty | 6184 | 2.17 | 0.67 | -7.71 |

Source: BSE, NSE

| Global Indices | Apr 21 | 1D % Chg | 3M % Chg | 1Y % Chg |
|----------------|--------|----------|----------|----------|
| DJIA | 49149 | -0.59 | 0.15 | 28.76 |
| Nasdaq | 24260 | -0.59 | 4.46 | 52.86 |
| FTSE 100 | 10498 | -1.05 | 3.55 | 26.86 |
| Nikkei 225 | 59349 | 0.89 | 12.46 | 73.13 |
| Hang Seng | 26487 | 0.48 | -0.37 | 23.80 |

Source: Financial websites

| Rs. Cr (Equity) | Fill Inv Apr 20 | MF Inv Apr 17 | DII Inv Apr 21 |
|-----------------|-----------------|---------------|----------------|
| Buy | 13408 | 14078 | 18367 |
| Sell | 12901 | 18220 | 16145 |
| Net | 507 | -4141 | 2221 |
| Net (YTD) | -169700 | 162901 | 278440 |

Source: NSDL, NSE

| Debt Market Indicators | Apr 21 | 1D Ago |
|---------------------------|---------|---------|
| Repo Rate | 5.25% | 5.25% |
| Call Rate | 5.17% | 5.13% |
| 10 Yr Gilt^ | 6.89% | 6.89% |
| 91-day T-bill^ | 5.15% | 5.18% |
| 182-day T Bill^ | 5.45% | 5.48% |
| 364-day T Bill^ | 5.52% | 5.55% |
| 3-mth CP rate | 6.54% | 6.50% |
| 6-mth CP rate | 7.07% | 7.05% |
| 1-yr CP rate | 7.32% | 7.32% |
| 3-mth CD rate | 6.11% | 6.08% |
| 6-mth CD rate | 6.66% | 6.67% |
| 12-mth CD rate | 6.95% | 6.95% |
| 5 yr Corp Bond | 7.57% | 7.57% |
| Net LAF o/s (Rs Cr)* | -415565 | -436618 |
| M3 supply (Rs lakh Cr)** | 314.66 | 301.93 |
| G-sec Volume (Rs Cr) | 50405 | 50120 |
| SDF* | 257338 | 278391 |
| 1 Year OIS | 5.78% | 5.78% |
| US 10-year Treasury Yield | 4.30% | 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 ended higher on Tuesday, driven by optimism over a potential US-Iran peace deal and expectations of strong fourth-quarter earnings.
- The top gainers were Nestle India, Hindustan Unilever, Trent, Bajaj Finance and Tata Consumer Products, up 2.24-8.43%.
- The top losers were SBI Life Insurance Company, Bharat Electronics, Dr. Reddy's Laboratories, Jio Financial Services and Titan Company, down 0.64-3.46%.

Global Equity

- Wall Street stocks closed lower on Tuesday as renewed Middle East tensions offset gains driven by strong corporate earnings.
- FTSE index closed lower on Tuesday due to worries ahead of the expiration of the US-Iran ceasefire on Wednesday, despite optimistic remarks from US President about potential peace negotiation.
- Strait Times Index ended higher on Tuesday due to stock-specific gains.
- Nikkei Index ended higher on Tuesday, driven by gains in tech stocks due to optimism over US-Iran peace talks.
- Hang Seng Index closed higher on Tuesday, supported by optimism over potential US-Iran peace talks.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended higher at 5.17% on Tuesday compared to 5.13% on Monday.
- Government bond prices ended flat on Tuesday due to caution amid volatile Brent crude oil prices and upcoming state debt auction.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.89% on Tuesday.

Capital Market

- PNC Infratech emerged as the lowest (L1) bidder for two HAM-based national highway projects worth Rs 3,483 cr.
- BEML has secured an order from the Ministry of Defence for the supply of trawl assemblies, with a contract value of Rs 590 crore.
- IHCL, along with its subsidiaries ANK Hotels and Pride Hospitality completed the acquisition of a 51% stake in Brij Hospital Private Limited for a total investment of up to Rs 222 crore.
- ReaRCo acquired KV Developers and secured Rs 195 crore from the SWAMIH Fund to complete the stalled Greater Noida project, providing relief to approximately 400 homebuyers.

Regulatory

- The Reserve Bank of India implemented E-mandate rules for cross-border recurring electronic payments via cards, prepaid instruments, and UPI, requiring pre-transaction notifications and allowing customers to opt-out of transactions while setting limits to enhance fraud prevention and transaction security.
- The Securities and Exchange Board of India lowered the minimum investment requirement for social impact funds from Rs 2 lakh to Rs 1,000, enabling retail investors to participate in the Social Stock Exchange.

Economy and Government

- India's economy is projected to grow at 6.4% in 2026 and 6.6% in 2027, according to the UN's Economic and Social Commission for Asia and the Pacific, which attributes the region's 5.4% growth in 2025 largely to India's strong economic performance.
- Moody's Ratings lowered India's FY27 growth forecast to 6%, from 6.8% earlier, citing weaker private consumption and softer industrial activity amid higher energy and input prices driven by the Iran war.
- India and Singapore are collaborating on a roadmap to develop digital corridors and green shipping infrastructure, leveraging India's renewable energy resources and Singapore's maritime expertise to advance decarbonization efforts in the global shipping sector while creating mutual economic opportunities.

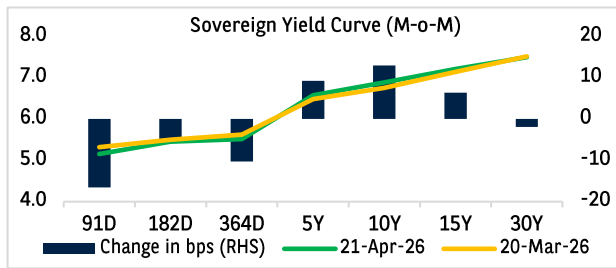
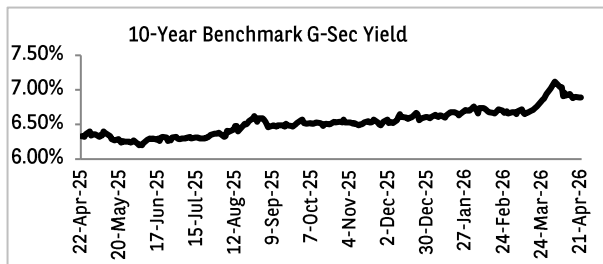
| Borrowing (in Rs cr) | Total | Completed | Balance |
|----------------------|---------|-----------|---------|
| FY 2025 | 820,000 | 95,000 | 725,000 |

Source: RBI

| Yields (%) | G-sec* | AAA | AA+ | AA | AA- | A+ |
|------------|--------|------|------|------|------|-------|
| 6-mth | 5.45 | 6.86 | 7.60 | 7.65 | 8.88 | 9.36 |
| 1-Yr | 5.80 | 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 21

* Weighted average yields; Source: CRISIL



International

- US Retail Sales increased 4% in March of 2026, unchanged from the previous month.
- Eurozone ZEW Indicator of Economic Sentiment dropped sharply by 11.9 points to -20.4 in April 2026 compared to -8.5 in March 2026.
- UK unemployment rate eased to 4.9% in February 2026, compared to 5.2% in January 2026.
- Japan trade surplus grew to JPY 667.0 billion in March 2026, compared to JPY 529.8 billion year-over-year, driven by record export growth of 11.7%.

Commodities

- Crude oil prices rose marginally by 6 cents to \$89.67 a barrel on the NYMEX due to uncertainty over peace talks.

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 21 | 1D Ago | 3M Ago | 1Y Ago |
|---------------------------------|--------|--------|--------|--------|
| London Brent Crude Oil (\$/bbl) | 98.48 | 95.48 | 65.24 | 66.26 |
| NYMEX Crude Oil (\$/bbl) | 89.67 | 89.61 | 60.62 | 63.08 |
| Gold (Rs / 10 gm)# | 152355 | 152096 | 154227 | 96670 |

ibjarrates spot prices

Source: Financial Websites, IBJA

| Currencies Vs INR | Apr 21 | Apr 20 |
|------------------------|--------|--------|
| USD | 93.44 | 93.07 |
| GBP | 126.33 | 125.51 |
| Euro | 110.02 | 109.36 |
| 100 Yen | 58.83 | 58.55 |
| Forex Reserve (\$ bn)* | 700.95 | 697.12 |
| Dollar Index | 98.41 | 98.05 |

*Data pertains to Apr 10 and to Apr 3 respectively

Source: RBI, Financial Websites

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