

Indian Indices	Mar 20	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74533	0.44	-12.24	-2.38	20.46
Nifty 50	23115	0.49	-10.98	-0.33	20.23
BSE Mid cap	42138	0.77	-9.47	1.88	NA
Nifty Midcap	54856	0.67	-9.04	7.26	30.52
Nifty Smallcap	15719	0.09	-9.61	-0.88	28.01
BSE SmallCap	45225	0.39	-10.98	-2.42	NA

Source: BSE, NSE

Indian Indices	Mar 20	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54718	0.71	-11.08	12.62
BSE Bankex	60173	0.07	-9.02	4.64
BSE CD	54751	0.73	-9.26	-1.83
BSE CG	67344	0.18	1.22	9.88
BSE FMCG	17320	0.46	-13.83	-9.70
BSE Healthcare	42306	1.45	-3.73	2.00
BSE IT	28227	2.08	-24.63	-21.77
BSE Metal	37708	1.41	8.22	20.42
BSE Oil & Gas	25977	0.27	-6.99	5.84
BSE Power	6924	0.98	7.31	6.91
BSE Realty	5418	-0.92	-21.14	-18.37

Source: BSE, NSE

Global Indices	Mar 20	1D % Chg	3M % Chg	1Y % Chg
DJIA	45577	-0.96	-5.31	8.64
Nasdaq	21648	-2.01	-7.12	22.36
FTSE 100	9918	-1.44	0.21	13.98
Nikkei 225	Closed	NA	NA	NA
Hang Seng	25277	-0.88	-1.61	4.37

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 19	MF Inv Mar 17	DII Inv Mar 20
Buy	23753	13067	22938
Sell	34718	9090	17232
Net	-10966	3976	5706
Net (YTD)	-99262	118628	201764

Source: NSDL, NSE

Debt Market Indicators	Mar 20	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.35%	5.40%
10 Yr Gilt^	6.74%	6.73%
91-day T-bill^	5.32%	5.32%
182-day T Bill^	5.50%	5.53%
364-day T Bill^	5.62%	5.64%
3-mth CP rate	7.58%	7.58%
6-mth CP rate	7.65%	7.65%
1-yr CP rate	7.45%	7.35%
3-mth CD rate	7.30%	7.30%
6-mth CD rate	7.25%	7.28%
12-mth CD rate	7.08%	7.02%
5 yr Corp Bond	7.44%	7.42%
Net LAF o/s (Rs Cr)*	-28110	-91072
M3 supply (Rs lakh Cr)**	302.98	298.55
G-sec Volume (Rs Cr)	40620	30510
SDF*	192450	255412
1 Year OIS	5.87%	5.81%
US 10-year Treasury Yield	4.39%	4.25%

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

**Feb 28 and Feb 15 respectively

Indian Equity

- Indian equity benchmarks closed higher on Friday as oil prices eased on reports that the Israeli Prime Minister said that the country would refrain from targeting energy infrastructure going forward and because of short covering.
- The top gainers were Tech Mahindra, JSW Steel, Tata Steel, Coal India, and Infosys, rising 2.88-3.41%.
- The top losers, Hindalco Industries, HDFC Bank, Shriram Finance, HDFC Life Insurance Company, and Oil and Natural Gas Corporation, fell 1.32-2.80%.

Global Equity

- Wall Street stocks declined on Friday as escalating geopolitical tensions increased worries about inflation and the potential for higher interest rates.
- FTSE index fell on Friday as the escalating Middle East war and surging oil prices deepened inflation fears and cemented expectations for the Bank of England to hike interest rates.
- Strait Times Index ended lower on Friday due to volatility in global crude oil prices.
- Hang Seng Index ended lower on Friday because of volatility induced by the conflict in the Middle East and weak earnings of a major technology conglomerate.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended flat at 5.40% on Friday.
- Government bond prices fell marginally on Friday due to persistent worries around higher crude oil prices while reports of central bank buying in the secondary market cut short losses.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.74% on Friday compared to 6.73% on Wednesday.

Capital Market

- Tata Steel inaugurates scrap-based Electric Arc Furnace with Rs 3,200 crore investment.
- Paranjape Schemes to invest Rs 700 crore to develop 1,400 homes in Pune.
- Mahindra Holidays & Resorts India launches 2 new resorts in Maharashtra, MP.
- Devyani International will invest Rs 347 crore in Thailand's Restaurants Development Co, Ltd.
- IndiQube signs Rs 54 crore Pune deal for 1,140 seats with GCC client.

Regulatory

- The Reserve Bank of India on Friday said it will conduct an overnight variable rate repo (VRR) auction of Rs 1 lakh crore on March 23.
- The Central Board of Directors of the Reserve Bank of India assessed the emerging global and domestic economic scenario, including the evolving geopolitical developments and their impact on financial markets, along with associated challenges.

Economy and Government

- India's foreign exchange reserves declined sharply, dropping by \$7.05 billion to reach \$709.76 billion in the week ending March 13.
- India's infrastructure output grew by 2.3% year-on-year in February 2026, marking a slowdown from the revised 4.7% growth recorded in the previous month.
- The government has rolled out Rs 20,000 crore credit guarantee scheme for microfinance institutions, offering much-needed support to players facing funding and liquidity pressures.
- The Central Board of Direct Taxes (CBDT) notified the Income-tax (I-T) Rules, 2026, which will come into effect on April 1, 2026, as part of the new I-T Act, 2025.
- The Central Board of Direct Taxes notified the rules for Income-tax Act, 2025 which provided enhanced tax benefit for HRA to salary earner but makes disclosure of landlord-tenant relationship mandatory.

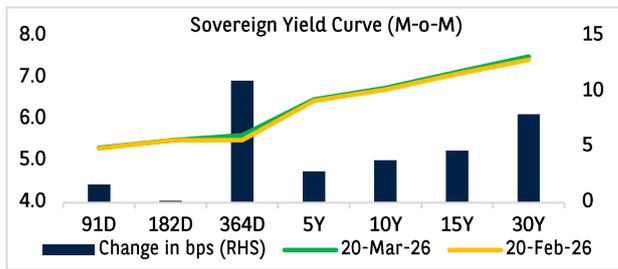
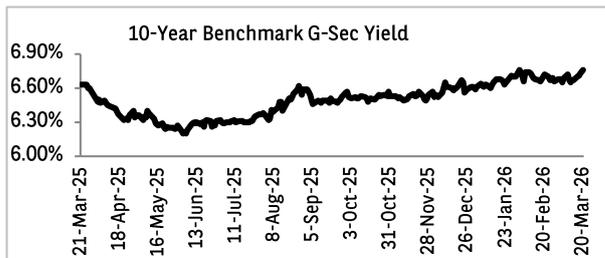
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.50	7.57	8.31	8.36	9.59	10.07
1-Yr	5.74	7.37	8.11	8.16	9.39	9.87
3-Yr	6.17	7.43	8.17	8.22	9.45	9.93
5-Yr	6.48	7.44	8.28	8.33	9.56	10.04
10-Yr	6.76	7.56	8.40	8.45	9.68	10.16

G-sec and corporate bonds data as of Mar 20

* Weighted average yields; Source: CRISIL



International

- Eurozone trade deficit expanded to €1.9 billion in January 2026, up from €1.4 billion in the same month last year.

Commodities

- Crude oil prices rose by \$2.70 to \$98.84 a barrel on the NYMEX amid persistent worries around supply disruption following ongoing geopolitical tensions.

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, Mospi, Financial Websites

Commodity Prices	Mar 20	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	112.19	108.65	60.47	72
NYMEX Crude Oil (\$/bbl)	98.84	96.14	56.52	68.07
Gold (Rs / 10 gm)#	147218	147889	131779	88506

ibjaraates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Mar 20	Mar 18
USD	93.35	92.45
GBP	125.16	123.64
Euro	107.94	106.76
100 Yen	58.94	58.29
Forex Reserve (\$ bn)*	709.76	716.81
Dollar Index	99.65	99.23

*Data pertains to Mar 13 and to Mar 6 respectively

Source: RBI, Financial Websites

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