

Indian Indices	Sep 22	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	82160	-0.56	-0.30	-2.82	22.72
Nifty 50	25202	-0.49	0.36	-2.28	22.14
BSE Mid cap	46501	-0.78	2.24	-5.41	33.12
Nifty Midcap	58700	-0.67	1.21	-2.51	31.99
Nifty Smallcap	18289	-1.17	0.52	-5.40	32.69
BSE SmallCap	54234	-0.71	3.54	-4.99	32.88

Source: BSE, NSE

Indian Indices	Sep 22	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60657	-0.41	14.59	1.69
BSE Bankex	62195	-0.28	-1.92	2.03
BSE CD	60853	-0.49	5.57	-10.30
BSE CG	70686	-0.77	0.63	-3.66
BSE FMCG	20641	-0.46	3.08	-13.80
BSE Healthcare	44770	-1.08	3.92	1.44
BSE IT	34988	-2.73	-8.34	-18.13
BSE Metal	33258	0.39	9.39	4.02
BSE Oil & Gas	26922	0.36	-0.49	-10.65
BSE Power	6985	1.66	4.07	-17.74
BSE Realty	7153	-0.21	-9.13	-16.98

Source: BSE, NSE

Global Indices	Sep 22	1D % Chg	3M % Chg	1Y % Chg
DJIA	46382	0.14	9.89	10.27
Nasdaq	22789	0.70	17.18	26.97
FTSE 100	9227	0.11	5.15	12.11
Nikkei 225	45494	0.99	18.46	20.60
Hang Seng	26344	-0.76	11.96	44.28

Source: Financial websites

Rs. Cr (Equity)	FI Inv Sep 19	MF Inv Sep 16	DII Inv Sep 22
Buy	37583	8455	12109
Sell	36454	6673	9674
Net	1128	1782	2435
Net (YTD)	-132099	374005	535345

Source: NSDL, NSE

Debt Market Indicators	Sep 22	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.74%	5.60%
10 Yr Gilt^	6.48%	6.49%
91-day T-bill^	5.50%	5.48%
182-day T Bill^	5.56%	5.57%
364-day T Bill^	5.57%	5.57%
3-mth CP rate	6.50%	6.50%
6-mth CP rate	6.65%	6.69%
1-yr CP rate	6.88%	6.90%
3-mth CD rate	5.80%	5.78%
6-mth CD rate	6.11%	6.10%
12-mth CD rate	6.37%	6.35%
5 yr Corp Bond	7.05%	7.05%
Net LAF o/s (Rs Cr)*	-17963	-19862
M3 supply (Rs lakh Cr)**	284.77	283.08
G-sec Volume (Rs Cr)	47240	63160
SDF*	78320	111533
1 Year OIS	5.45%	5.45%
US 10-year Treasury Yield	4.15%	4.14%

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

** Sep 5 and Aug 22 respectively

Indian Equity

- Indian equity benchmarks closed lower on Monday, mainly on account of losses in the IT pack post an abrupt increase in the one-time fee for H-1B visas by the US.
- The top losers were Tech Mahindra, Tata Consultancy Services, Infosys, Wipro and Cipla, down 2.13-3.11%.
- The top gainers were Adani Enterprises, Eternal, Bajaj Finance, Adani Ports and UltraTech Cement, up 1.13-4.43%.

Global Equity

- Wall Street stocks closed higher on Monday, boosted by gains in technology stocks after Nvidia announced its OpenAI investment plan.
- FTSE index closed marginally higher on Monday led by gains in mining stocks as investors awaited key economic data.
- Strait Times Index closed lower on Monday, owing to stock-specific losses.
- Nikkei Index closed higher on Monday amid easing concerns over the Bank of Japan's ETF sales plan.
- Hang Seng Index ended lower on Monday, due to a disappointing outcome of a call between the president of the US and China.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended higher at 5.74% on Monday compared to 5.60% on Friday.
- Government bond prices ended flat on Monday as investors awaited the second half borrowing calendar and the Reserve Bank of India's policy decision.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended flat at 6.49% on Monday.

Capital Market

- The National Bank for Agriculture and Rural Development (Nabard) plans to raise up to Rs 7,000 crore via bonds maturing in three years, three months and 25 days.
- Power Finance Corporation (PFC) plans to raise up to Rs 3,500 crore through bonds maturing in two years and 20 days.
- Pace Digitek Ltd plans to raise Rs 819 crore through its initial public offering (IPO), which will open for subscription on September 26.
- Solar Energy Corporation of India plans to raise up to Rs 600 crore on Thursday through bonds maturing in 10 years.
- All Things People (ATP) raised Rs 7 crore in its seed funding round via an angel syndicate of prominent global industry leaders, family, and friends who share the venture's vision of transforming workplace experiences for millions worldwide.

Regulatory

- The Securities and Exchange Board of India (Sebi) issued a consultation paper to review and streamline the framework for handling technical glitches in brokers' electronic trading systems.

Economy and Government

- India core sector output expanded by 6.3% in August 2025, accelerating from the upwardly revised 3.2% increase in July 2025.
- Chief Economic Advisor V Anantha Nageswaran said the government's commitment to the 4.4% fiscal deficit target for FY26, maintaining market borrowing at Rs 6.82 lakh crore for the second half.
- Prime Minister Narendra Modi unveiled infrastructure projects worth Rs 5,125.37 crore in Arunachal Pradesh.
- The government has come out with draft rules to form an organisation to regulate the functioning of the proposed coal exchange that will facilitate the trading of coal as a commodity.

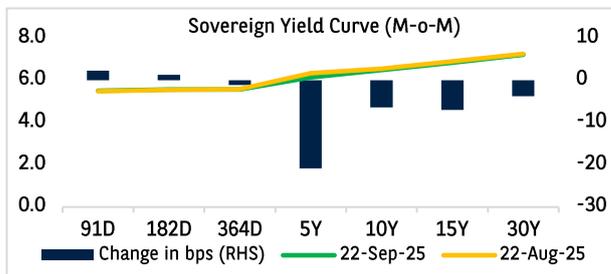
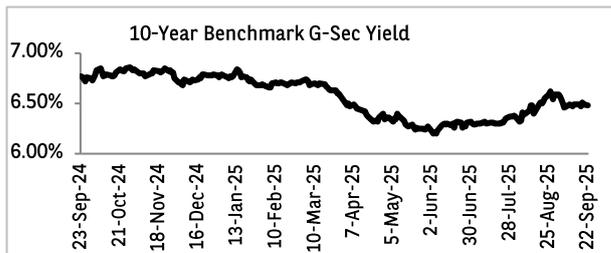
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	7,68,000	32,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.56	6.44	7.15	7.19	8.42	8.95
1-Yr	5.62	6.78	7.49	7.53	8.76	9.29
3-Yr	5.95	7.01	7.72	7.76	8.99	9.52
5-Yr	6.13	7.05	7.86	7.89	9.13	9.66
10-Yr	6.48	7.25	8.06	8.09	9.33	9.86

G-sec and corporate bonds data as of Sep 22

* Weighted average yields; Source: CRISIL



International

- US Chicago Fed National Activity Index (CFNAI) fell to 0.12 in August 2025 compared to a downwardly revised 0.28 in July 2025.
- Eurozone consumer confidence fell to 14.9 in September 2025 compared to a decline 15.5 in August 2025.

Commodities

- Crude oil prices fell by 40 cents to \$62.28 a barrel on the NYMEX due to oversupply concerns.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	2.07% (Aug-25)	2.82% (May-25)	3.65% (Aug-24)
IIP	3.5% (Jul-25)	2.6% (Apr-25)	5.0% (Jul-24)
GDP	7.8% (Apr-Jun FY25)	7.4% (Jan-Mar FY25)	6.5% (Apr-Jun FY24)
GST Collection (in Rs cr)	1,86,315 (Aug-25)	2,01,050 (May-25)	1,74,962 (Aug-24)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Sep 22	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.57	66.68	77.01	74.49
NYMEX Crude Oil (\$/bbl)	62.28	62.68	73.84	71.92
Gold (Rs / 10 gm)#	112155	109775	98691	74093

ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Sep 22	Sep 19
USD	88.14	88.31
GBP	118.80	119.25
Euro	103.49	103.93
100 Yen	59.50	59.78
Forex Reserve (\$ bn)*	702.97	698.27
Dollar Index	97.22	97.64

*Data pertains to Sep 12 and to Sep 5 respectively

Source: RBI, Financial Websites

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