

Indian Indices	Mar 24	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74068	1.89	-13.28	-5.02	20.36
Nifty 50	22912	1.78	-12.35	-3.15	20.05
BSE Mid cap	41493	2.42	-11.35	-2.10	NA
Nifty Midcap	54087	2.60	-10.53	2.98	30.09
Nifty Smallcap	15495	2.63	-12.50	-5.31	27.61
BSE SmallCap	44430	2.42	-13.72	-7.15	NA

Source: BSE, NSE

Indian Indices	Mar 24	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54195	2.30	-12.51	10.10
BSE Bankex	59218	2.40	-10.48	-0.72
BSE CD	53342	2.46	-11.09	-3.95
BSE CG	65887	1.90	-2.40	4.41
BSE FMCG	17083	1.41	-15.53	-11.82
BSE Healthcare	41878	1.34	-4.89	-1.03
BSE IT	28552	1.65	-24.38	-22.02
BSE Metal	36540	1.74	2.95	16.54
BSE Oil & Gas	25595	1.70	-8.45	0.60
BSE Power	6789	0.85	4.36	1.37
BSE Realty	5238	1.51	-23.67	-22.98

Source: BSE, NSE

Global Indices	Mar 24	1D % Chg	3M % Chg	1Y % Chg
DJIA	46124	-0.18	-5.35	8.31
Nasdaq	21762	-0.84	-7.84	19.65
FTSE 100	9965	0.72	0.96	15.36
Nikkei 225	52252	1.43	3.79	38.94
Hang Seng	25064	2.79	-2.93	4.84

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 23	MF Inv Mar 20	DII Inv Mar 24
Buy	10703	18965	21127
Sell	22002	14666	15260
Net	-11299	4299	5867
Net (YTD)	-116112	128255	219665

Source: NSDL, NSE

Debt Market Indicators	Mar 24	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	4.80%	5.25%
10 Yr Gilt^	6.86%	6.83%
91-day T-bill^	5.37%	5.33%
182-day T Bill^	5.50%	5.50%
364-day T Bill^	5.65%	5.65%
3-mth CP rate	7.75%	7.72%
6-mth CP rate	7.78%	7.73%
1-yr CP rate	7.70%	7.60%
3-mth CD rate	7.50%	7.47%
6-mth CD rate	7.45%	7.40%
12-mth CD rate	7.35%	7.25%
5 yr Corp Bond	7.59%	7.52%
Net LAF o/s (Rs Cr)*	-35833	50051
M3 supply (Rs lakh Cr)**	302.98	298.55
G-sec Volume (Rs Cr)	39060	44980
SDF*	279429	139390
1 Year OIS	5.94%	5.97%
US 10-year Treasury Yield	4.39%	4.34%

*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 ended Tuesday with a gain, driven by improved investor confidence following US President Donald Trump's decision to temporarily halt military action against Iran.
- The top gainers were InterGlobe Aviation, Larsen & Toubro, Bajaj Finance, Eternal and Asian Paints, up 4.68%-5.49%.
- The top losers were Coal India, Power Grid Corporation of India, Adani Enterprises, Sun Pharmaceutical Industries and Cipla, down 0.32%-3.00%.

Global Equity

- Wall Street stocks slipped on Tuesday as Iran-war uncertainty and higher treasury yields overshadowed brief optimism over conflict resolution talks.
- FTSE index ended higher on Tuesday driven by gains in energy stocks as investors assessed mixed signals from the Middle East conflict.
- Strait Times Index edged higher on Tuesday due to stock-specific gains.
- Nikkei Index rebounded to close in the green on Tuesday on hopes of a de-escalation in the Middle East conflict after the US President delayed targeting Iran's energy infrastructure.
- Hang Seng Index ended higher on Tuesday as Trump postponed strikes on Iran, easing tensions.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended lower at 4.80% on Tuesday compared to 5.25% on Monday.
- Government bond prices fell on Tuesday due to slight cooling in global crude oil prices on hopes of US-Iran talks.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.87% on Tuesday compared to 6.84% on Monday.

Capital Market

- VinFast Auto India partnered with CSB Bank to offer auto and inventory financing for its dealer network and customers.
- Kalpataru Projects International Ltd (KPIL) secured orders worth about Rs 4,439 crores in the Transmission and Distribution (T&D) business.
- Suzlon Group secured a 100 MW wind energy project from Gas Authority of India Ltd (GAIL).
- NeuEN Green Energy secured a contract to supply 10 thousand tonnes per annum (KTPA) of green hydrogen to Numaligarh Refinery (NRL).

Regulatory

- The Reserve Bank of India (RBI) injected Rs 55,837 crore transient liquidity into the banking system through three-day variable rate repo (VRR) auction.
- Sebi proposed introducing gift cards or gift prepaid payment instruments (PPIs) for investments in mutual funds to improve financial inclusion through onboarding of new investors in the space.

Economy and Government

- India HSBC Flash Manufacturing PMI fell to 53.8 in March 2026 compared to 56.9 in February 2026 while the HSBC Flash Composite PMI edged down to 56.5 from 58.9 and the HSBC India Services PMI eased to 57.2 from 58.1.
- Prime Minister Narendra Modi said the government is trying to procure gas and crude oil from all available sources, and efforts will continue in the coming days as the war in West Asia has created a serious energy crisis globally.
- The government extended the validity of licences issued for gold import at quota-based duty concession under a free trade pact with the UAE till June 3 amid the West Asian crisis.
- The Delhi government will finance its through its own revenue pegged at Rs 74,000 crore and Rs 16,700 crore market borrowing through the RBI.

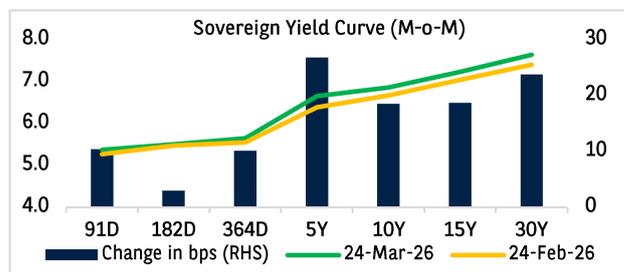
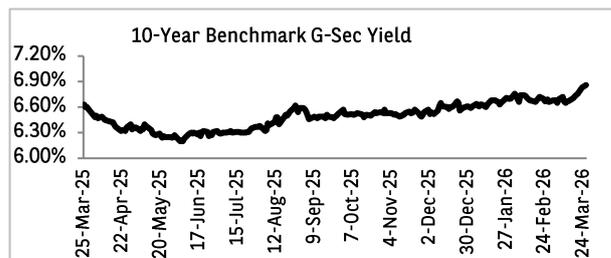
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.50	7.75	8.49	8.54	9.77	10.25
1-Yr	5.88	7.45	8.19	8.24	9.47	9.95
3-Yr	6.25	7.54	8.28	8.33	9.56	10.04
5-Yr	6.66	7.59	8.43	8.48	9.71	10.19
10-Yr	6.86	7.65	8.49	8.54	9.77	10.25

G-sec and corporate bonds data as of Mar 24

* Weighted average yields; Source: CRISIL



International

- US S&P Global Flash Manufacturing PMI rose to 52.4 in March 2026 compared to 51.6 in February 2026 while the S&P Global Flash Services PMI fell to 51.1 from 51.7 and the S&P Global Flash Composite PMI declined to 51.4 from 51.9.
- Eurozone S&P Global Flash Manufacturing PMI rose to 51.4 in March 2026 compared to 50.8 in February 2026 while the S&P Global Flash Services PMI fell to 50.1 from 51.9 and the S&P Global Flash Composite PMI declined to 50.5 from 51.9.
- UK S&P Global Flash Manufacturing PMI eased to 51.4 in March 2026 compared to 51.7 in February 2026 while the S&P Global Flash Services PMI fell to 51.2 from 53.9 and the S&P Global Flash Composite PMI fell to 51.0 from 53.7.

Commodities

- Crude oil prices rose by \$4.22 to \$92.35 a barrel on the NYMEX due to uncertainty around Middle East war amid reports that Iran denied holding talks with the US.

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 24	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	104.49	99.94	62.24	73
NYMEX Crude Oil (\$/bbl)	92.35	88.13	58.35	69.11
Gold (Rs / 10 gm)#	140420	139569	136627	87719

ibjarrates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Mar 24	Mar 23
USD	93.88	93.90
GBP	125.83	124.82
Euro	108.74	108.22
100 Yen	59.16	58.83
Forex Reserve (\$ bn)*	709.76	716.81
Dollar Index	99.43	98.95

*Data pertains to Mar 13 and to Mar 6 respectively

Source: RBI, Financial Websites

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