

Indian Indices	May 25	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76489	1.42	-7.03	-6.40	20.57
Nifty 50	24032	1.32	-5.69	-3.31	20.71
BSE Mid cap	46992	0.83	2.40	4.75	NA
Nifty Midcap	61967	0.94	4.12	9.31	29.94
Nifty Smallcap	18203	1.37	7.18	3.17	30.33
BSE SmallCap	53096	1.33	8.67	3.06	NA

Source: BSE, NSE

Indian Indices	May 25	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58299	1.76	-7.44	10.53
BSE Bankex	62290	2.27	-9.12	-1.07
BSE CD	58494	1.10	-1.36	0.37
BSE CG	78698	0.49	12.12	13.65
BSE FMCG	18539	-0.06	-2.69	-10.26
BSE Healthcare	47482	0.45	7.88	11.69
BSE IT	28130	0.23	-5.13	-23.85
BSE Metal	43583	0.54	6.51	40.05
BSE Oil & Gas	27534	1.51	-6.03	1.15
BSE Power	8158	0.94	16.25	19.85
BSE Realty	6129	1.40	-1.07	-15.52

Source: BSE, NSE

Global Indices	May 25	1D % Chg	3M % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA
Nasdaq	Closed	NA	NA	NA
FTSE 100	Closed	NA	NA	NA
Nikkei 225	65158	2.87	11.22	75.34
Hang Seng	Closed	NA	NA	NA

Source: Financial websites

Rs. Cr (Equity)	FII Inv May 22	MF Inv May 21	DII Inv May 25
Buy	10169	12362	16435
Sell	15428	10689	12578
Net	-5259	1673	3857
Net (YTD)	-225338	221498	355342

Source: NSDL, NSE

Debt Market Indicators	May 25	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.35%	5.37%
10 Yr Gilt^	7.03%	7.09%
91-day T-bill^	5.54%	5.54%
182-day T Bill^	5.82%	5.82%
364-day T Bill^	5.87%	5.93%
3-mth CP rate	8.05%	8.05%
6-mth CP rate	8.20%	8.15%
1-yr CP rate	8.33%	8.30%
3-mth CD rate	7.50%	7.40%
6-mth CD rate	7.80%	7.75%
12-mth CD rate	7.95%	7.95%
5 yr Corp Bond	7.88%	7.93%
Net LAF o/s (Rs Cr)*	-64725	-61265
M3 supply (Rs lakh Cr)**	311.59	309.27
G-sec Volume (Rs Cr)	46685	43530
SDF*	178755	175295
1 Year OIS	6.15%	6.30%
US 10-year Treasury Yield	NA	4.56%

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

**Data as of Apr 30 and Apr 15 respectively

Indian Equity

- Indian equity benchmarks closed higher on Monday, buoyed by optimism over a potential US-Iran peace agreement, declining oil prices and a strengthening rupee, supported by foreign fund inflows.
- The top gainers were Eicher Motors, Adani Enterprises, Bajaj Finance, Tata Motors Passenger Vehicles and Larsen & Toubro, up 2.76-6.45%.
- The top losers were Max Healthcare Institute, Oil & Natural Gas Corporation, Hindalco Industries, Infosys and Bajaj Auto, down 0.43-2.21%.

Global Equity

- Strait Times Index ended higher on Monday amid optimism over a potential US-Iran peace deal and easing global tensions.
- Nikkei Index was higher on Monday driven by optimism over the Iran talks and positive global cues.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended lower at 5.35% on Monday compared to 5.37% on Friday.
- Government bond prices ended higher on Monday due to optimism over a potential US-Iran peace deal, easing geopolitical tensions and reduced crude oil prices, easing inflation fears.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 7.03% on Monday compared to 7.09% on Friday.

Capital Market

- Puravankara Ltd acquired a 14.57-acre land parcel in Bengaluru to develop a housing project with a revenue potential of around Rs 2,300 crore.
- Kalpataru has signed a cluster redevelopment project in the MMR with an estimated gross development value of Rs 1,250 crore.
- Panattoni plans to develop a 1.52 lakh sq ft manufacturing facility worth Rs 150 crore in Hyderabad to expand its industrial footprint.
- Hospital chain Park Medi World Limited is acquiring The Medicity Hospital in Rudrapur in an all-cash transaction valued at Rs 177 crore.
- Jupiter Wagons, signed a MoU with Chalukya Power and Pickrenew Energy two renewable energy developers adding 110 MWh of battery energy storage system (BESS) business to its orderbook for FY27.

Regulatory

- The Reserve Bank of India (RBI) said it will examine the role of quantum technology in the financial sector to improve security, resilience, and operational efficiency in the banking and payments ecosystem.
- The Reserve Bank of India has introduced a three-year cooling-off period for cooperative bank directors after 10 years of service, tightening governance standards in the sector.
- According to Reserve Bank of India data, credit card spending in India rose 7% year-on-year to Rs 1.97 trillion in April 2026, indicating continued strength in consumer spending and payments activity.

Economy and Government

- India has proposed a comprehensive overhaul of the industrial output index ahead of launching a new series, aiming to improve measurement accuracy and policy relevance.
- Finance Minister launched key SIDBI initiatives to strengthen the MSME ecosystem by improving credit access, boosting institutional support, and helping small businesses scale more efficiently.
- Uttar Pradesh Chief Minister calls for a simplified, trader-friendly tax system and enhanced services for honest taxpayers to promote compliance and economic growth.

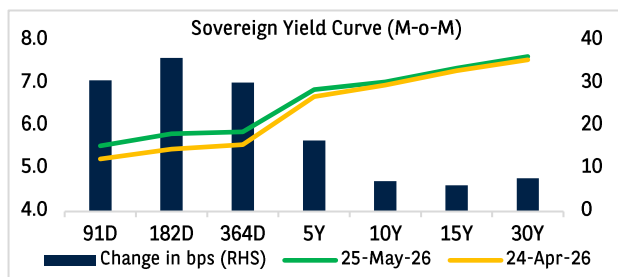
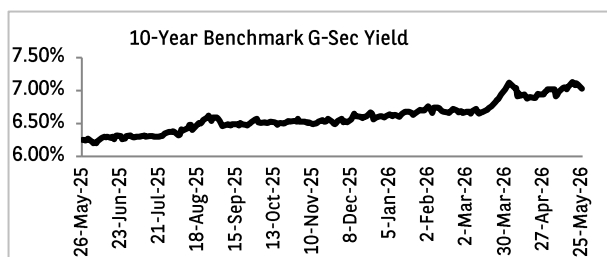
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	254,000	566,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.82	8.07	8.81	8.86	10.09	10.57
1-Yr	6.18	7.98	8.72	8.77	10.00	10.48
3-Yr	6.56	7.89	8.63	8.68	9.91	10.39
5-Yr	6.85	7.88	8.72	8.77	10.00	10.48
10-Yr	7.03	7.87	8.71	8.76	9.99	10.47

G-sec and corporate bonds data as of May 25

* Weighted average yields; Source: CRISIL



Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.48% (Apr'26)	2.74% (Jan'26)	3.16% (Apr'25)
IIP	4.1% (Mar'26)	8.0% (Dec'25)	3.9% (Mar'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)	2,42,702 (Apr'26)	1,93,384 (Jan'26)	2,36,716 (Apr'25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	May 25	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	96.14	103.54	70.85	64.78
NYMEX Crude Oil (\$/bbl)	NA	96.6	65.42	61.53
Gold (Rs / 10 gm)#	158857	158117	159008	95471

ibjarates spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	May 25	May 22
USD	95.20	95.96
GBP	128.35	128.79
Euro	110.82	111.39
100 Yen	59.91	60.31
Forex Reserve (\$ bn)*	688.89	696.99
Dollar Index	99.24	99.32

*Data pertains to May 15 and to May 8 respectively

Source: RBI, Financial Websites

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@barodabnpparibasmf.in

Commodities

- Brent crude oil prices fell \$7.40 to \$96.14 a barrel as optimism over a potential US-Iran peace deal raised expectations that the Strait of Hormuz could reopen, easing supply disruption concerns.

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