

Indian Indices	Apr 24	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76664	-1.29	-5.98	-3.93	20.98
Nifty 50	23898	-1.14	-4.59	-1.44	20.85
BSE Mid cap	45954	-0.90	3.86	5.42	NA
Nifty Midcap	59375	-0.96	3.90	8.01	36.49
Nifty Smallcap	17567	-0.87	7.43	3.56	29.78
BSE SmallCap	50665	-1.25	8.20	2.84	NA

Source: BSE, NSE

Indian Indices	Apr 24	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	56682	-0.78	-4.83	13.11
BSE Bankex	63188	-0.44	-4.06	0.29
BSE CD	59083	-1.02	3.93	1.73
BSE CG	77089	-0.72	24.78	22.75
BSE FMCG	18764	-0.82	-0.19	-9.41
BSE Healthcare	43617	-1.35	5.58	1.60
BSE IT	27649	-5.13	-25.06	-20.56
BSE Metal	41927	-0.31	10.69	41.85
BSE Oil & Gas	27038	-0.63	1.01	3.08
BSE Power	8067	-0.40	33.81	17.27
BSE Realty	6022	-1.30	2.15	-12.19

Source: BSE, NSE

Global Indices	Apr 24	1D % Chg	3M % Chg	1Y % Chg
DJIA	49231	-0.16	0.27	22.79
Nasdaq	24837	1.63	5.68	44.68
FTSE 100	10379	-0.75	2.32	23.45
Nikkei 225	59716	0.97	10.90	70.43
Hang Seng	25978	0.24	-2.88	18.57

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Apr 23	MF Inv Apr 20	DII Inv Apr 24
Buy	12984	14177	21560
Sell	15454	12047	16859
Net	-2470	2130	4701
Net (YTD)	-172824	165031	283034

Source: NSDL, NSE

Debt Market Indicators	Apr 24	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.11%	5.30%
10 Yr Gilt^	6.94%	6.95%
91-day T-bill^	5.23%	5.23%
182-day T Bill^	5.46%	5.46%
364-day T Bill^	5.57%	5.57%
3-mth CP rate	6.75%	6.61%
6-mth CP rate	7.20%	7.15%
1-yr CP rate	7.44%	7.44%
3-mth CD rate	6.25%	6.25%
6-mth CD rate	6.85%	6.80%
12-mth CD rate	7.06%	7.06%
5 yr Corp Bond	7.64%	7.60%
Net LAF o/s (Rs Cr)*	-307618	-339227
M3 supply (Rs lakh Cr)**	309.27	314.66
G-sec Volume (Rs Cr)	52020	55940
SDF*	149391	181000
1 Year OIS	5.87%	5.91%
US 10-year Treasury Yield	4.31%	4.34%

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

\*\*Apr 15 and Mar 31 respectively

## Indian Equity

- Indian equity benchmarks closed lower on Friday due to the Middle East conflict and volatile crude oil prices.
- Top losers were Sun Pharmaceuticals, HCL Technologies, Tech Mahindra, TCS and Infosys, down 3.67%-6.92%.
- Top gainers were Shriram Finance, Nestle India, Hindalco, Trent and Coal India, up 0.66% to 0.97%.

## Global Equity

- Wall Street stocks ended mixed on Friday with Nasdaq rising due to surge in Intel shares while Dow Jones declined as ongoing Middle East tensions pressured the blue-chip index.
- FTSE index declined on Friday due to geopolitical unrest, slump in shares of Mondy and caution ahead of upcoming earnings from major banks.
- Strait Times Index closed lower on Friday due to geopolitical uncertainties and inflation concerns.
- Nikkei Index closed higher on Friday, driven by optimism over technology sector earnings.
- Hang Seng Index closed higher on Friday, led by gains in technology and semiconductor stocks.
- At 8.30 AM, Asian Markets were mostly trading higher.

## Indian Debt

- The interbank call-money rate ended lower at 5.11% on Friday compared to 5.30% on Thursday.
- Government bond prices were almost unchanged on Friday due to cautious global risk sentiment and volatile energy prices.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.94% on Friday compared to 6.95% on Thursday.

## Capital Market

- JSW Steel and Japan's JFE Steel Corporation announced their 50:50 joint venture for the proposed expansion of the JSW-acquired Bhushan Power and Steel Ltd (BPSL) facility at Sambalpur in Odisha, with an estimated investment of around Rs 32,000 crore.
- Indian Hume Pipe Company received a Letter of Intent worth Rs 418 crore from the Jihe Kathapur Lift Irrigation Division of the Maharashtra Krishna Valley Development Corporation (MKVDC).
- JK Cement has been declared the preferred bidder for the mining lease of the Maliyakheri Limestone Block-I, which spreads over an area of 6.90 hectares in Chittorgarh, Rajasthan.

## Regulatory

- RBI data showed bank credit grew by 15% on year in the fortnight ended April 15, 2026, lower compared to 16.1% on year growth recorded in the previous fortnight.
- The Securities and Exchange Board of India (Sebi) proposed revising the variable net worth requirements for stock brokers to better align capital requirements with operational risks and protect investor interests.
- Sebi has operationalised its earlier proposal to allow net settlement of funds for foreign portfolio investors (FPIs) in the cash market, setting a deadline of December 31, 2026, for implementation.

## Economy and Government

- Union Finance Minister Nirmala Sitharaman said domestic consumption is sustaining the growth momentum in the economy, and predictable policy support is essential to ensure that the pace of GDP expansion continues.
- India's foreign exchange reserves increased by \$2.36 billion to \$703 billion during the week ended April 17 on the back of a rise in foreign currency assets.

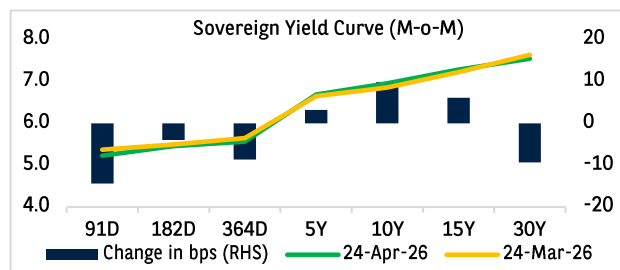
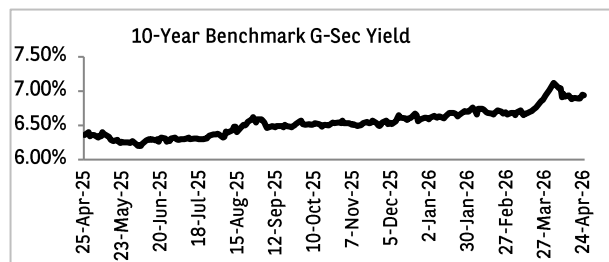
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	820,000	127,000	693,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.46	7.07	7.81	7.86	9.09	9.57
1-Yr	5.85	7.29	8.03	8.08	9.31	9.79
3-Yr	6.33	7.60	8.34	8.39	9.62	10.10
5-Yr	6.69	7.64	8.48	8.53	9.76	10.24
10-Yr	6.96	7.70	8.54	8.59	9.82	10.30

G-sec and corporate bonds data as of Apr 24

\* Weighted average yields; Source: CRISIL



## International

- US Michigan Inflation Expectations increased to 4.7% in April 2026 compared to 3.8% in March 2026.
- UK Retail Sales rose 1.7% in March 2026, compared to a 1.8% increase in February 2026.
- China industrial profits surged 15.5% in Q1 2026, accelerating compared to a 15.2% gain in the first two months of the year.
- Japan annual inflation rose to 1.5% in March 2026 compared to 1.3% in February 2026 while the core inflation rate rose 1.8% from 1.6%.

## Commodities

- Crude oil prices fell by \$1.45 to \$94.40 a barrel on the NYMEX amid US-Iran headwinds, including softer demand cues and concerns around rising crude inventories.

## 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 24	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	105.33	105.07	65.88	66.55
NYMEX Crude Oil (\$/bbl)	94.4	95.85	61.07	62.79
Gold (Rs / 10 gm)#	151479	151059	154310	96286

# ibjarares spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Apr 24	Apr 23
USD	94.30	94.08
GBP	126.95	126.96
Euro	110.14	110.14
100 Yen	59.02	58.93
Forex Reserve (\$ bn)*	703.31	700.95
Dollar Index	98.51	98.80

\*Data pertains to Apr 17 and to Apr 10 respectively

Source: RBI, Financial Websites

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