

Indian Indices	Sep 27	1D % Chg	3M % Chg	1Y % Chg	PE
S&P BSE Sensex	66119	0.26	4.26	15.78	24.19
Nifty 50	19716	0.26	4.78	15.93	22.27
BSE Mid cap	32310	0.76	13.86	31.59	25.69
Nifty Midcap	40641	0.75	15.14	34.75	23.96
Nifty Smallcap	12676	0.98	17.87	36.50	23.50
BSE SmallCap	37477	0.68	15.62	33.89	29.48

Source: BSE, NSE

Indian Indices	Sep 27	1D % Chg	3M % Chg	1Y % Chg
S&P BSE Auto	36890	0.00	8.51	28.22
S&P BSE Bankex	50086	-0.07	0.40	14.10
S&P BSE CD	45890	-0.32	8.38	9.75
S&P BSE CG	47226	1.14	19.30	53.24
S&P BSE FMCG	18912	0.77	2.26	17.44
S&P BSE Healthcare	28072	1.13	10.49	23.29
S&P BSE IT	32746	0.48	12.65	19.71
S&P BSE Metal	22833	0.14	12.26	29.03
S&P BSE Oil & Gas	18938	-0.38	5.61	1.29
S&P BSE Power	4635	0.17	17.02	-2.82
S&P BSE Realty	4610	0.70	11.83	38.66

Source: BSE, NSE

Global Indices	Sep 27	1D % Chg	3M % Chg	1Y % Chg
DJIA	33550	-0.20	-1.11	15.15
Nasdaq	13093	0.22	-3.41	20.90
FTSE 100	7593	-0.43	1.77	8.71
Nikkei 225	32372	0.18	-0.51	21.83
Hang Seng	17612	0.83	-8.02	-1.39

Source: Financial websites

Rs. Cr (Equity)	FII Inv Sep 26	MF Inv Sep 21	DII Inv Sep 27
Buy	9406	5992	8420
Sell	9269	4574	8033
Net	138	1419	386
Net (YTD)	126268	106447	121448

Source: NSDL, NSE

Debt Market Indicators	Sep 27	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.75%	6.75%
10 Yr Gilt^	7.17%	7.15%
91-day T-bill^	6.88%	6.87%
182-day T Bill^	7.06%	7.03%
364-day T Bill^	7.07%	7.11%
3-mth CP rate	7.39%	7.41%
6-mth CP rate	7.65%	7.67%
1-yr CP rate	7.78%	7.80%
3-mth CD rate	7.02%	7.08%
6-mth CD rate	7.23%	7.28%
12-mth CD rate	7.43%	7.45%
5 yr Corp Bond	7.62%	7.62%
Net LAF o/s (Rs Cr)*	-52560	-51824
M3 supply (Rs lakh Cr)**	234.77	233.17
G-sec Volume (Rs Cr)	44960	46620
SDF*	58665	57929
1 Year OIS	7.06%	7.06%
US 10-year Treasury Yield	4.63%	4.56%

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

\*\* Sep 8 and Aug 25 respectively

## Indian Equity

- Indian equity indices snapped the six-day fall on Wednesday, tracking global cues amid strong macroeconomic indicators.
- The top gainers were L&T, Coal India, ITC, Cipla and LTIMindtree, up 1.38-1.80%.
- The top losers were Titan Company, Grasim, Hero MotoCorp, SBI and BPCL, down 0.75-1.47%.

## Global Equity

- Wall Street stocks ended mixed on Wednesday as Dow Jones fall as rising US treasury yield and crude oil prices sour sentiments amid caution ahead of key economic data while Nasdaq gained on bargain buying.
- FTSE index closed lower on Wednesday on sell-off in real estate shares and worries over interest rate decision by global central bank.
- Straits Times index ended lower on Wednesday due to stock-specific sell-offs.
- Nikkei index ended marginally high on Wednesday as investors bought stocks to secure rights for dividend payouts for companies that count September as the end of their half year.
- Hang Seng index ended higher on Wednesday following upbeat Chinese industrial profits data.
- At 8.30 AM in the morning, Asian Markets were trading mixed.

## Indian Debt

- The interbank call money rate ended flat at 6.75% on Wednesday.
- Government bond prices ended lower on Wednesday as the government kept its borrowing target for the second half of the fiscal year unchanged.
- The yield of the new 10-year benchmark 7.18% 2033 paper ended higher at 7.17% on Wednesday compared to 7.14% on Tuesday.

## Capital Market

- Adani Ports will buy back up to \$195 mn of its 2024 bond.
- Sterling & Wilson Renewable Energy's board approved a proposal to raise Rs 1500 cr either in the form of debt or equity.
- CESC's board approved the issuance of 30,000 non-convertible debentures on private placement basis to raise Rs 300 cr.
- Apollo Hospitals has acquired partially built hospital in Sonarpur, Kolkata with a total capacity of 325 beds, for Rs 102 cr.
- Doceree raised \$35 mn in a Series B funding round led by Creaegis.

## Regulatory

- The Pension Fund Regulatory and Development Authority (PFRDA) submitted a proposal to the government to increase the guaranteed pension amount under the Atal Pension Yojana (APY).
- The Telecom Regulatory Authority of India (Trai) recommended that the lower end of the 6 GHz spectrum band should be allocated for unlicensed uses like WiFi, while the upper end should be reserved for licensed telco use.

## Economy and Government

- The Finance Ministry has notified changes to the IGST Act with regard to payment of integrated GST on 'ocean freight' on imported goods with effect from October 1.
- Food and Consumer Affairs Minister Piyush Goyal highlighted that high-quality standards in products and services will help India achieve its ambition of becoming a developed economy by 2047.

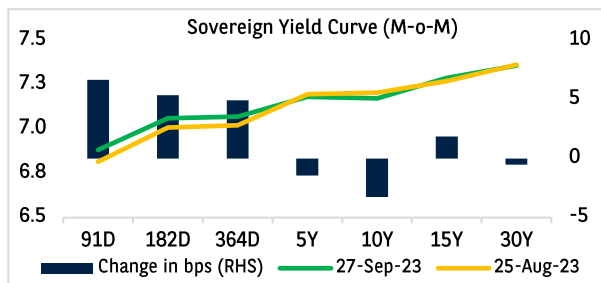
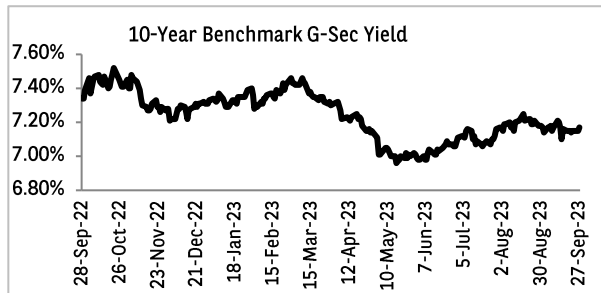
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2024	1543000	888000	655000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	7.06	7.30	7.98	8.00	9.41	9.74
1-Yr	7.09	7.51	8.19	8.21	9.62	9.95
3-Yr	7.21	7.62	8.30	8.32	9.73	10.06
5-Yr	7.18	7.62	8.49	8.52	9.92	10.25
10-Yr	7.17	7.62	8.49	8.52	9.92	10.25

G-sec and corporate bonds data as of Sep 27

\* Weighted average yields; Source: CRISIL



## International

- US durable goods orders rose 0.2% on month in August, recovering from an upwardly revised 5.6% slump in July.
- Japan leading economic index rose to 108.2 in July from 108.8 in June while coincident index eased to 114.2 in July from 115.6.

## Commodities

- Crude oil prices rose \$3.29 to \$93.68 a barrel on the NYMEX due to unexpected drop in US oil supply coupled with persistent worries over tight global supply.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Sep 27	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Sep 27	Sep 26
Monthly Inflation (CPI)	6.83% (Aug-2023)	4.31% (May-23)	7.00% (Aug-22)	London Brent	96.55	93.96	72.26	86.27	USD	83.23	83.23
IIP	5.7% (July-23)	4.5% (Apr-23)	2.4% (July-22)	Crude Oil (\$/bbl)	93.68	90.39	67.7	78.5	GBP	101.13	101.44
GDP	7.8% (Apr-June FY24)	6.1% (Jan-Mar FY23)	13.1% (Apr-June FY23)	NYMEX Crude Oil (\$/bbl)	58454	58933	58442	49529	Euro	87.90	88.23
GST Collection (in Rs cr)	159069 (Aug-23)	157909 (May-23)	143612 (Aug-22)	Gold (Rs / 10 gm)#	# ibjarrates spot prices				100 Yen	55.83	55.90
					Source: Financial Websites, IBIA				Forex Reserve (\$ bn)*	593.04	593.90
									Dollar Index	106.62	106.23

Source: CRISIL, Mospi, Financial Websites

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