

Indian Indices	Sep 26	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80426	-0.90	-3.98	-6.30	22.25
Nifty 50	24655	-0.95	-3.50	-5.96	21.66
BSE Mid cap	44747	-1.96	-3.48	-9.33	31.79
Nifty Midcap	56379	-2.05	-4.81	-6.76	30.72
Nifty Smallcap	17561	-2.26	-6.62	-8.83	31.41
BSE SmallCap	52281	-2.05	-3.11	-8.36	31.76

Source: BSE, NSE

Indian Indices	Sep 26	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59152	-1.12	10.36	-4.49
BSE Bankex	61398	-0.92	-4.52	-0.49
BSE CD	58119	-2.34	-1.99	-13.91
BSE CG	68346	-1.78	-3.68	-7.12
BSE FMCG	20149	-0.63	-0.57	-15.95
BSE Healthcare	43047	-2.14	-1.53	-2.45
BSE IT	33327	-2.41	-12.65	-21.86
BSE Metal	32760	-1.90	3.24	-3.36
BSE Oil & Gas	26433	-0.80	-4.18	-15.00
BSE Power	6698	-1.42	-2.24	-23.40
BSE Realty	6728	-1.01	-14.10	-23.88

Source: BSE, NSE

Global Indices	Sep 26	1D % Chg	3M % Chg	1Y % Chg
DJIA	46247	0.65	6.59	9.66
Nasdaq	22484	0.44	11.48	23.60
FTSE 100	9285	0.77	6.29	12.07
Nikkei 225	45355	-0.87	14.58	16.52
Hang Seng	26128	-1.35	7.41	31.14

Source: Financial websites

Rs. Cr (Equity)	FII Inv Sep 25	MF Inv Sep 24	DII Inv Sep 26
Buy	16324	8688	17065
Sell	20424	8029	11465
Net	-4101	660	5600
Net (YTD)	-142834	385097	550234

Source: NSDL, NSE

Debt Market Indicators	Sep 26	1D Ago
Repo Rate	5.50%	5.50%
Call Rate	5.57%	5.00%
10 Yr Gilt^	6.52%	6.50%
91-day T-bill^	5.48%	5.48%
182-day T Bill^	5.56%	5.56%
364-day T Bill^	5.56%	5.57%
3-mth CP rate	6.57%	6.57%
6-mth CP rate	6.68%	6.68%
1-yr CP rate	6.88%	6.88%
3-mth CD rate	5.90%	5.88%
6-mth CD rate	6.15%	6.15%
12-mth CD rate	6.40%	6.40%
5 yr Corp Bond	7.00%	7.02%
Net LAF o/s (Rs Cr)*	-25989	15597
M3 supply (Rs lakh Cr)**	284.77	283.08
G-sec Volume (Rs Cr)	62790	44580
SDF*	95049	93350
1 Year OIS	5.47%	5.46%
US 10-year Treasury Yield	4.20%	4.18%

*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 Friday, after US President Donald Trump announced tariffs of up to 100% on branded and patented drug imports, effective October 1, 2025.
- The top losers were, Mahindra & Mahindra, IndusInd Bank, Eternal, Tata Steel and Bajaj Finance, down 2.73-3.78%.
- The top gainers were, Larsen & Toubro, Tata Motors, ITC, Eicher Motors and Reliance Industries, up 0.38-2.34%.

Global Equity

- Wall Street stocks closed higher on Friday, boosted by in-line consumer inflation data, stronger personal income, and resilient consumer spending.
- FTSE index closed higher on Friday, lifted by gains in banks and consumer discretionary shares.
- Strait Times Index closed lower on Friday as latest US growth numbers dented the hopes of a Federal Reserve (Fed) rate cut.
- Nikkei Index closed lower on Friday, led by a fall in technology stocks after the upbeat US growth data dashed Fed rate cut hopes.
- Hang Seng Index closed lower on Friday, led by losses in pharma stocks after the US government's new bout of tariffs on the industry.
- At 8.30 AM, Asian Markets were mostly trading higher.

Indian Debt

- The interbank call money rate ended higher at 5.57% on Friday compared to 5.00% on Thursday.
- Government bond prices fell on Friday amid concerns that government may increase supply of 5-yr and 10-yr securities under its H2FY26 borrowing plan.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.52% on Friday compared to 6.50% on Thursday.

Capital Market

- Curefoods filed its draft red herring prospectus (DRHP) to raise Rs 800 crore through the IPO, which also comprises an offer for sale (OFS) component of 4.08 crore shares.
- Aarvee Engineering Consultants filed its DRHP with Sebi, aiming to raise Rs 202.5 crore through a fresh issue of shares in its upcoming IPO.
- Deon Energy filed its DRHP to Sebi, proposing a fresh issue of shares worth Rs 150 crore in its IPO.
- NCDEX secured shareholder approval to issue Rs 770 crore worth of shares, marking a key step toward launching equity and derivatives segments by 2026, strengthening its multi-asset exchange vision.
- Parijat Industries (India) filed its Draft Red Herring Prospectus (DRHP) with the Securities and Exchange Board of India (SEBI) to raise up to Rs 160 crore through an Initial Public Offering (IPO).

Regulatory

- The Reserve Bank of India (RBI) issued new directions on authenticating digital transactions, seeking to balance consumer safety and ease of use.
- The National Company Law Tribunal (NCLT) cleared the cross-border merger of Star Television Productions Limited (STPL), with its Indian affiliate Jio Star India.

Economy and Government

- According to Reserve Bank of India data released, India's foreign exchange reserves fell by \$396 million to \$702.57 billion for the week ending September 19.
- Prime Minister Narendra Modi launched Bihar's Mukhyamantri Mahila Rojgar Yojana, under which the government will transfer Rs 10,000 each into the bank accounts of 7.5 million women in the state.
- The Finance Ministry in its monthly report, said recent GST rate cuts will help lower inflation over the next year and also bring a further upside bias to the country's growth prospects.

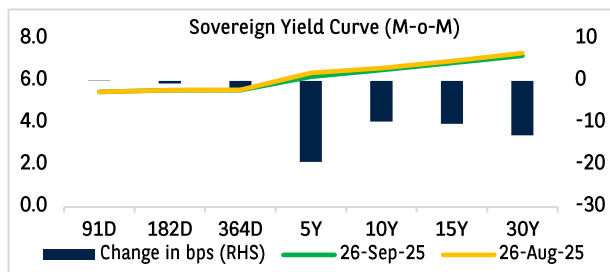
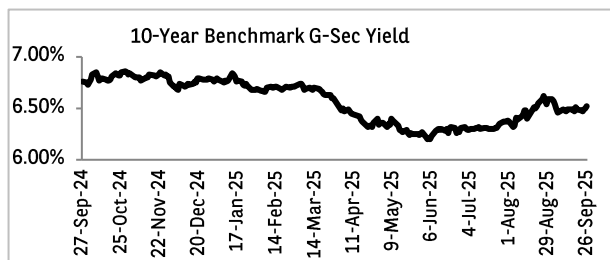
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	8,00,000	7,68,000	32,000

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	5.61	6.72	7.43	7.47	8.70	9.23
3-Yr	5.93	6.96	7.67	7.71	8.94	9.47
5-Yr	6.20	7.00	7.81	7.84	9.08	9.61
10-Yr	6.52	7.23	8.04	8.07	9.31	9.84

G-sec and corporate bonds data as of Sep 26

* Weighted average yields; Source: CRISIL



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 26	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	70.13	69.42	67.73	71.6
NYMEX Crude Oil (\$/bbl)	65.72	64.98	65.24	67.67
Gold (Rs / 10 gm)#	113262	113349	97159	75750

ibjarares spot prices

Source: Financial Websites, IBIA

Currencies Vs INR	Sep 26	Sep 25
USD	88.72	88.67
GBP	118.50	119.32
Euro	103.62	104.17
100 Yen	59.24	59.58
Forex Reserve (\$ bn)*	702.57	702.97
Dollar Index	98.15	98.55

*Data pertains to Sep 19 and to Sep 12 respectively

Source: RBI, Financial Websites

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