

Indian Indices	Mar 27	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	73583	-2.25	-13.47	-5.18	20.22
Nifty 50	22820	-2.09	-12.37	-3.27	19.97
BSE Mid cap	41604	-2.07	-10.95	-0.51	NA
Nifty Midcap	54098	-2.23	-10.31	4.36	30.10
Nifty Smallcap	15620	-1.74	-11.73	-3.10	27.83
BSE SmallCap	44430	-2.25	-13.42	-5.07	NA

Source: BSE, NSE

Indian Indices	Mar 27	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53871	-2.79	-12.56	11.72
BSE Bankex	58817	-2.70	-10.87	-0.86
BSE CD	53711	-2.50	-10.38	-1.85
BSE CG	65703	-2.28	-2.14	4.59
BSE FMCG	17095	-1.87	-15.48	-11.51
BSE Healthcare	42428	-0.73	-3.29	2.31
BSE IT	28448	-0.63	-23.98	-22.64
BSE Metal	36836	-1.66	3.30	18.98
BSE Oil & Gas	25653	-0.55	-8.17	2.39
BSE Power	6798	-1.45	4.78	2.17
BSE Realty	5204	-3.10	-24.05	-22.30

Source: BSE, NSE

Global Indices	Mar 27	1D % Chg	3M % Chg	1Y % Chg
DJIA	45167	-1.73	-7.28	6.78
Nasdaq	20948	-2.15	-11.21	17.66
FTSE 100	9967	-0.05	0.98	15.02
Nikkei 225	53373	-0.43	5.17	41.20
Hang Seng	24952	0.38	-3.36	5.82

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 25	MF Inv Mar 20	DII Inv Mar 27
Buy	15282	18965	37579
Sell	16848	14666	34013
Net	-1566	4299	3566
Net (YTD)	-124893	128255	228661

Source: NSDL, NSE

Debt Market Indicators	Mar 27	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	5.50%	5.40%
10 Yr Gilt^	6.94%	6.87%
91-day T-bill^	5.45%	5.35%
182-day T Bill^	5.51%	5.45%
364-day T Bill^	5.65%	5.63%
3-mth CP rate	7.90%	7.89%
6-mth CP rate	7.85%	7.78%
1-yr CP rate	7.62%	7.70%
3-mth CD rate	7.55%	7.59%
6-mth CD rate	7.45%	7.45%
12-mth CD rate	7.25%	7.35%
5 yr Corp Bond	7.67%	7.62%
Net LAF o/s (Rs Cr)*	-61856	-73669
M3 supply (Rs lakh Cr)**	301.93	302.98
G-sec Volume (Rs Cr)	35990	34400
SDF*	233519	245832
1 Year OIS	6.04%	5.93%
US 10-year Treasury Yield	4.44%	4.42%

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

**Mar 15 and Feb 28 respectively

Indian Equity

- Indian equity benchmarks closed lower on Friday dragged down by rising bond yields, foreign fund outflows and profit booking amid heightened Middle East tensions.
- The top losers were Shriram Finance, Tata Motors Passenger Vehicles Ltd, Reliance, Indigo and Bajaj Finance, down 4.11-5.54%.
- The top gainers were ONGC, Wipro, Bharti Airtel, TCS and Coal India up 0.24-4.03%.

Global Equity

- Wall Street stocks declined on Friday dragged down by persistent Middle east conflict and renewed tensions with Iran.
- FTSE index closed marginally lower on Friday amid lingering Middle East uncertainty.
- Strait Times Index ended higher on Friday due to stock-specific gains.
- Nikkei Index ended lower on Friday, dragged down by waning hopes for a ceasefire in the Middle East.
- Hang Seng Index ended higher on Friday, boosted by strong industrial profit data despite lingering Middle East tensions.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended higher at 5.50% on Friday compared to 5.40% on Wednesday.
- Government bond prices ended lower on Friday after fuel excise duty cut raised fiscal concerns and amplified oil-driven worries.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.94% on Friday compared to 6.88% on Wednesday.

Capital Market

- SoftBank Group secured a \$40 billion loan through a bridge facility to fund further investments in ChatGPT maker OpenAI and for general corporate purposes.
- Coal India plans to invest Rs 3,300 crore to set up eight coking coal washeries by FY2030, aiming to improve coal quality, reduce imports and support domestic steel production.
- Birla Estates announced its entry into the Mumbai Metropolitan Region's (MMR's) redevelopment market with its first project, with a revenue potential of Rs 1,700 crore.

Regulatory

- The Reserve Bank of India introduced a bold new daily limit on the open rupee positions held by banks, aiming to counteract the rupee's weakening trend versus the dollar.
- The Reserve Bank of India (RBI) injected Rs 65,322 crore of transient liquidity into the banking system through a six-day variable rate repo (VRR) auction.

Economy and Government

- According to RBI's data, India's forex reserves dropped by \$11.413 billion to \$698.346 billion during the week ended March 20 from \$709.760 billion the week before due to a sharp decrease in gold reserves.
- The Defence Acquisition Council approved projects totaling Rs 2.38 lakh crore, including missile systems, aircraft, and naval equipment.
- The central government boosted commercial LPG supplies to states by 20%, lifting allocations to 70% of pre-conflict demand to support industrial needs such as steel and automotive sectors.
- India introduced several tax adjustments, including a tax on fuel exports, in an effort to protect consumers from the effects of the escalating conflict in West Asia, which has disrupted energy supplies.

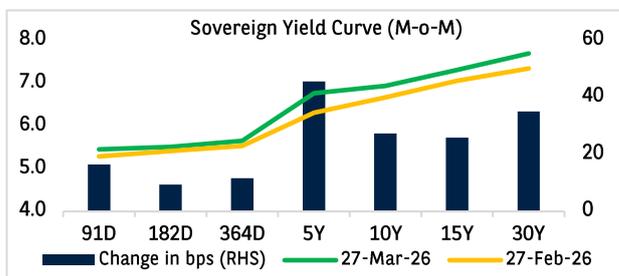
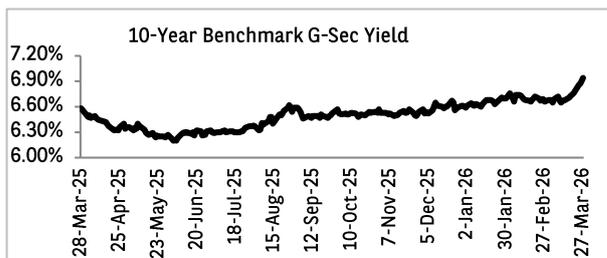
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.51	7.72	8.46	8.51	9.74	10.22
1-Yr	5.79	7.52	8.26	8.31	9.54	10.02
3-Yr	6.37	7.59	8.33	8.38	9.61	10.09
5-Yr	6.76	7.67	8.51	8.56	9.79	10.27
10-Yr	6.94	7.74	8.58	8.63	9.86	10.34

G-sec and corporate bonds data as of Mar 27

* Weighted average yields; Source: CRISIL



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 27	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	112.57	108.01	60.64	74.03
NYMEX Crude Oil (\$/bbl)	99.64	94.48	56.74	69.92
Gold (Rs / 10 gm)#	142942	146205	137956	88417

ibjarates spot prices

Source: Financial Websites, IBI

Currencies Vs INR	Mar 27	Mar 25
USD	94.60	93.97
GBP	126.20	125.76
Euro	109.16	108.95
100 Yen	59.26	59.10
Forex Reserve (\$ bn)*	698.35	709.76
Dollar Index	100.15	99.90

*Data pertains to Mar 20 and to Mar 13 respectively

Source: RBI, Financial Websites

International

- US Michigan Inflation Expectations increased to 3.80% in March compared to 3.40% in February of 2026.
- Eurozone median inflation expectations fell for the second month in a row, reaching 2.5% in February 2026—down from 2.6% in January.
- The UK GfK Consumer Confidence Index declined to -21 in March 2026, down from -19 in February.
- UK retail sales volumes increased by 2.5% in February 2026 compared to 4.8% rise in January 2026.
- China's Industrial profits surged by 15.2% year-on-year in the first two months of 2026, marking a strong recovery from the modest 0.6% growth recorded in 2025.

Commodities

- Crude oil prices rose by \$5.16 to \$99.64 a barrel on the NYMEX as doubts over a potential ceasefire in the Iran war kept supply concerns elevated.

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