

Indian Indices	Mar 30	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	71948	-2.22	-15.03	-7.06	19.78
Nifty 50	22331	-2.14	-13.91	-5.05	NA
BSE Mid cap	40537	-2.56	-12.80	-2.39	NA
Nifty Midcap	52650	-2.68	-12.12	1.89	NA
Nifty Smallcap	15204	-2.66	-13.22	-5.54	NA
BSE SmallCap	43218	-2.73	-15.13	-7.33	NA

Source: BSE, NSE

Indian Indices	Mar 30	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52614	-2.33	-15.04	10.29
BSE Bankex	56581	-3.80	-14.63	-4.97
BSE CD	52619	-2.03	-11.09	-3.24
BSE CG	64243	-2.22	-3.20	2.42
BSE FMCG	16774	-1.88	-16.82	-13.75
BSE Healthcare	41778	-1.53	-3.80	0.86
BSE IT	27926	-1.83	-24.16	-22.69
BSE Metal	36816	-0.06	1.52	19.44
BSE Oil & Gas	25559	-0.37	-8.54	1.69
BSE Power	6672	-1.85	3.75	1.27
BSE Realty	5046	-3.03	-25.22	-23.56

Source: BSE, NSE

Global Indices	Mar 30	1D % Chg	3M % Chg	1Y % Chg
DJIA	45216	0.11	-6.51	8.73
Nasdaq	20795	-0.73	-11.21	20.04
FTSE 100	10128	1.61	1.88	16.97
Nikkei 225	51886	-2.79	3.07	39.78
Hang Seng	24751	-0.81	-4.27	5.65

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 27	MF Inv Mar 20	DII Inv Mar 30
Buy	22117	18965	26359
Sell	26082	14666	11464
Net	-3965	4299	14895
Net (YTD)	-128857	128255	243556

Source: NSDL, NSE

Debt Market Indicators	Mar 30	1D Ago
Repo Rate	5.25%	5.25%
Call Rate	7.00%	5.50%
10 Yr Gilt^	7.02%	6.94%
91-day T-bill^	5.40%	5.45%
182-day T Bill^	5.51%	5.51%
364-day T Bill^	5.70%	5.65%
3-mth CP rate	7.75%	7.90%
6-mth CP rate	7.65%	7.85%
1-yr CP rate	7.60%	7.62%
3-mth CD rate	7.35%	7.55%
6-mth CD rate	7.30%	7.45%
12-mth CD rate	7.25%	7.25%
5 yr Corp Bond	7.67%	7.67%
Net LAF o/s (Rs Cr)*	-140141	-139827
M3 supply (Rs lakh Cr)**	301.93	302.98
G-sec Volume (Rs Cr)	43245	35990
SDF*	321289	233519
1 Year OIS	6.26%	6.04%
US 10-year Treasury Yield	4.35%	4.44%

*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 Monday, weighed down by renewed geopolitical conflicts that reignited oil-driven inflation fears.
- The top losers were Bajaj Finance, Shriram Finance, State Bank of India, InterGlobe Aviation, and Kotak Mahindra Bank, down 3.59% - 4.95%.
- The top gainers were Hindalco Industries, Tech Mahindra, Coal India, Oil and Natural Gas Corporation and Power Grid Corporation of India, up 0.10% - 2.46%.

Global Equity

- Wall Street stocks closed mixed on Monday with Dow Jones rising due to gains in industrial and energy stocks while Nasdaq declined as higher uncertainty and elevated yields pressured tech stocks.
- FTSE index closed higher on Monday, lifted by mining and energy stocks as rising commodity prices reflected mounting supply concerns from the Middle East conflict.
- Strait Times Index closed marginally lower on Monday due to escalating global uncertainties.
- Nikkei Index closed lower on Monday, dragged down by rising bond yields and growing stagflation fears linked to the escalating Middle East conflict.
- Hang Seng Index closed lower on Monday due to increasing oil prices amid the escalating Middle East conflict.
- At 8.30 AM, Asian Markets were mostly trading lower.

Indian Debt

- The interbank call-money rate ended higher at 7.00% on Monday compared to 5.50% on Friday.
- Government bond prices ended lower on Monday as soaring oil prices, war-driven uncertainty and weak demand overshadowed RBI's bond buying and liquidity support.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 7.00% on Monday compared to 6.94% on Friday.

Capital Market

- K Raheja Group, in association with InterContinental Hotels Group to open a hospitality development, including a dual-hotel complex and a large-format convention centre, valued at approximately Rs 1,800 crore in Mumbai.
- JSW Steel said Japan's JFE Steel Corporation has invested Rs 7,875 crore to acquire 25 per cent stake in JSW Kalinga Steel Ltd.
- Epik secured \$1 million in pre-seed funding to enhance its fulfillment infrastructure, expand its product catalog, and scale its demo personnel network.
- Black Box raised Rs 386.36 crore through the conversion of warrants into equity shares, with promoters contributing Rs 200 crore to the total infusion.

Regulatory

- The Reserve Bank of India (RBI) injected Rs 84,582 crore of transient liquidity into the banking system through two variable repo rate (VRR) auctions.

Economy and Government

- India industrial production growth accelerated to 5.2% year-over-year in February 2026, compared to a revised 5.1% in January 2026.
- Government data showed India's fiscal deficit for the first eleven months of this fiscal year through February stood at Rs 12.5 lakh crore (about \$132 billion), or 80.4% of the annual estimate.
- India proposed changes to its IT law to make advisories and clarifications legally binding on internet platforms such as Meta, Google and X, the latest in a string of stricter compliance requirements for tech giants.
- Finance Minister Nirmala Sitharaman said the country's economic fundamentals are strong, and compared to other emerging market economies, the Indian rupee is "absolutely going fine" against the US dollar.

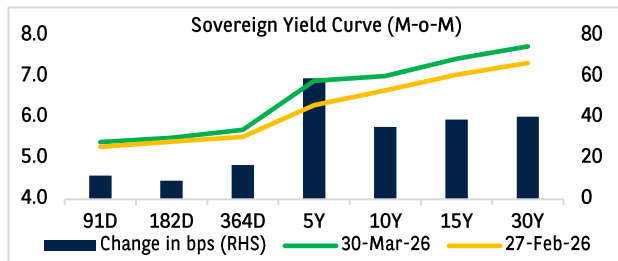
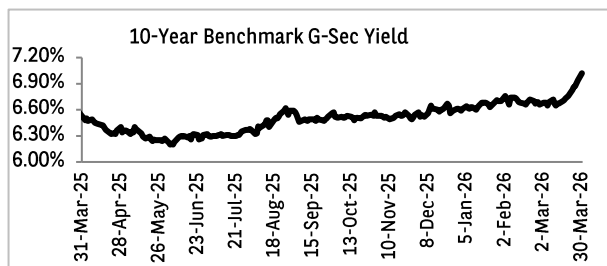
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	677,000	677,000	0

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	5.51	7.57	8.31	8.36	9.59	10.07
1-Yr	5.82	7.57	8.31	8.36	9.59	10.07
3-Yr	6.43	7.59	8.33	8.38	9.61	10.09
5-Yr	6.90	7.67	8.51	8.56	9.79	10.27
10-Yr	7.02	7.74	8.58	8.63	9.86	10.34

G-sec and corporate bonds data as of Mar 30

* Weighted average yields; Source: CRISIL



International

- The US Dallas Fed Manufacturing Index dropped to -0.20 in March 2026, compared to 0.20 in February 2026.
- Eurozone consumer confidence eased to -16.3 in March 2026, compared to -12.3 recorded in February 2026.
- China official NBS Manufacturing PMI rose to 50.4 in March 2026, compared to 49.0 in February 2026 while the official NBS Non-Manufacturing PMI rose to 50.1 from 49.5.
- China NBS General PMI rose to 50.5 in March 2026 compared to 49.5 in January 2026.
- Japan Industrial Production increased 0.3% in February 2026 compared to 0.7% rise in January 2026.
- Japan Retail sales fell 0.2% in February 2026, compared to a reversing 1.8% growth in January 2026.
- Japan unemployment rate rose to 2.6% in February 2026, compared to a 2.7% rise in January 2026.

Commodities

- Crude oil prices rose by \$3.24 to \$102.88 a barrel on the NYMEX as the widening regional conflict, marked by attacks on Israel heightened fears of deeper supply disruptions.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago
Monthly Inflation (CPI)	3.21% (Feb'26)	0.71% (Nov'25)	3.61% (Feb'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)	1,83,609 (Feb-26)	1,93,384 (Nov-25)	1,69,779 (Feb-25)

Source: CRISIL, Mospi, Financial Websites

Commodity Prices	Mar 30	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	116.89	112.57	61.33	73.63
NYMEX Crude Oil (\$/bbl)	102.88	99.64	57.95	69.36
Gold (Rs / 10 gm)#	146733	142942	134599	89164

ibjarares spot prices

Source: Financial Websites, IBJA

Currencies Vs INR	Mar 30	Mar 27
USD	94.65	94.60
GBP	125.63	126.20
Euro	109.01	109.16
100 Yen	59.25	59.26
Forex Reserve (\$ bn)*	698.35	709.76
Dollar Index	100.51	100.15

*Data pertains to Mar 20 and to Mar 13 respectively

Source: RBI, Financial Websites

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