

Indian Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg	PE
S&P BSE Sensex	82201	-0.18	10.51	24.96	24.12
Nifty 50	25145	-0.21	11.16	28.46	23.38
BSE Mid cap	49197	0.27	15.52	53.35	33.58
Nifty Midcap	59449	0.38	15.96	47.68	44.37
Nifty Smallcap	19521	1.03	19.84	54.24	30.61
BSE SmallCap	56522	0.56	22.14	48.88	35.92

Source: BSE, NSE

Indian Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg
S&P BSE Auto	58417	-0.38	6.21	61.67
S&P BSE Bankex	58420	0.06	4.64	17.04
S&P BSE CD	64396	0.82	16.04	43.29
S&P BSE CG	72376	-0.61	10.26	57.67
S&P BSE FMCG	23264	-0.07	12.67	24.81
S&P BSE Healthcare	43593	0.35	22.53	54.79
S&P BSE IT	43301	0.43	28.23	32.54
S&P BSE Metal	31524	-0.02	-1.86	35.00
S&P BSE Oil & Gas	32416	-0.30	18.47	70.52
S&P BSE Power	8098	-0.37	10.79	78.00
S&P BSE Realty	8137	-0.95	3.94	76.41

Source: BSE, NSE

Global Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	40756	-0.54	5.02	17.65
Nasdaq	17128	0.25	-0.35	22.16
FTSE 100	8242	-0.34	-0.06	10.81
Nikkei 225	36657	-1.05	-4.76	10.96
Hang Seng	17444	-0.07	-5.32	-5.49

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Sep 4	MF Inv Sep 2	DII Inv Sep 5
Buy	17701	9878	14803
Sell	16115	8885	11832
Net	1586	994	2971
Net (YTD)	52676	240425	315523

Source: NSDL, NSE

Debt Market Indicators	Sep 5	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.24%	5.75%
10 Yr Gilt^	6.85%	6.86%
91-day T-bill^	6.63%	6.64%
182-day T Bill^	6.71%	6.71%
364-day T Bill^	6.72%	6.72%
3-mth CP rate	7.64%	7.64%
6-mth CP rate	7.88%	7.88%
1-yr CP rate	7.90%	7.90%
3-mth CD rate	7.25%	7.21%
6-mth CD rate	7.49%	7.45%
12-mth CD rate	7.65%	7.64%
5 yr Corp Bond	7.48%	7.48%
Net LAF o/s (Rs Cr)*	-254092	-257278
M3 supply (Rs lakh Cr)**	257.27	255.90
G-sec Volume (Rs Cr)	35945	40605
SDF*	93975	136411
1 Year OIS	6.47%	6.48%
US 10-year Treasury Yield	3.73%	3.77%

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

** Aug 09 and Jul 26 respectively

Indian Equity

- Indian equities ended lower on Thursday, ahead of key US payroll and unemployment data that could affect upcoming Federal Reserve rate decisions.
- The top losers were Cipla, Reliance, Dr Reddys Labs, Coal India and Britannia, down 1.29-1.46%.
- The top gainers were Titan Company, LTIMindtree, Wipro, BPCL and ITC, up 0.96-3.19%.

Global Equity

- Wall Street stocks ended mixed on Thursday with Nasdaq gaining driven by technology stocks, while Dow Jones declined as investors are focused on key job data due.
- FTSE index ended lower on Thursday, dragged down by a selloff in pharma stocks.
- Strait Times Index closed higher on Thursday due to stock-specific gains.
- Nikkei Index closed lower on Thursday pressured by a stronger yen and declines in semiconductor stocks, as investors awaited US non-farm payroll data.
- Hang Seng Index ended lower on Thursday dragged down by oil stocks.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended higher at 6.24% on Thursday compared to 5.75% on Wednesday.
- Government bond prices ended flat on Thursday ahead of the release of the US non-farm payrolls data.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended flat at 6.86% on Thursday.

Capital Market

- Brigade Enterprises raised Rs 1,500 crore through a Qualified Institutional Placement (QIP).
- Max Ventures Investment Holdings divested a 3.18% stake in Max Financial Services for Rs 1,218 cr through an open market transaction.
- PN Gadgil Jewellers announced a price band of Rs 456-480 a share for its Rs 1,100 cr initial public offering.
- Reliance Industries Ltd's (RIL) board approved a 1:1 bonus issue.
- Max Estates has announced raising Rs 800 cr through a Qualified Institutional Placement (QIP).

Regulatory

- Company secretaries' apex body ICSI has come out with a framework to promote sustainable and responsible investment practices that seek to help institutional investors and service providers.

Economy and Government

- Prime Minister Narendra Modi plans to launch the "Jal Sanchay Jan Bhagidari" initiative in Gujarat to enhance community involvement in water conservation.
- Union Finance Minister Nirmala Sitharaman denied any "friction" in the ties between the Centre and States over Goods and Services Tax and emphasised that the federal structure in this economic reform should be respected.
- The Ministry of Coal issued allocation orders for three coal mines namely Machhakata (Revised), Kudanali Lubri and Sakhigopal-B Kakurhi, to NLC India Limited, Gujarat Mineral Development Corporation Limited and TANGEDCO respectively
- Industries Minister MB Patil said the government planned to borrow Rs 5000 crore to provide infrastructure at the new industrial areas including laying of water supply lines.
- India and Singapore signed four MoUs to enhance cooperation in semiconductor development and talent cultivation.

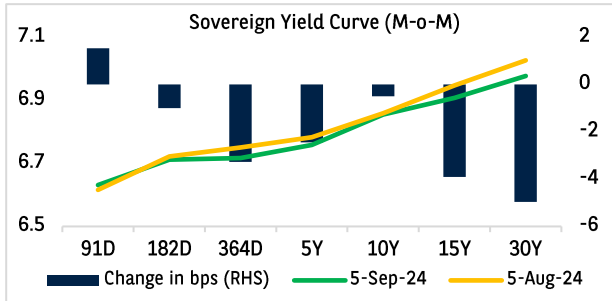
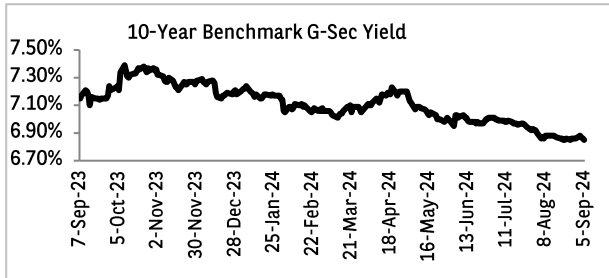
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	7,50,000	6,63,000	87,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.71	7.65	8.39	8.44	9.73	10.13
1-Yr	6.75	7.65	8.39	8.44	9.73	10.13
3-Yr	6.74	7.58	8.32	8.37	9.66	10.06
5-Yr	6.76	7.48	8.33	8.38	9.67	10.07
10-Yr	6.85	7.37	8.22	8.27	9.56	9.96

G-sec and corporate bonds data as of Sep 5

* Weighted average yields; Source: CRISIL



International

- US added 99,000 workers to their payrolls in August, the lowest number since January 2021, following a downwardly revised 111,000 in July.
- US initial jobless claims dropped by 5,000 from the previous week to 227,000 on the period ending August 31 and reaching a new 7-week low.
- US S&P Global Services PMI revised higher to 55.7 in August from 55 in July while Composite PMI was revised to 54.6 from 54.3.
- US ISM Services edged higher to 51.5 in August from 51.4 in June.
- Eurozone Retail Sales decreased 0.10% in July from a 0.4% decline in June.
- Eurozone HCOB Construction PMI remained unchanged at 41.4 in August from July.
- UK S&P Global Construction PMI declined to 53.6 in August compared to 55.3 in July.
- Japan Household spending rose by 0.1% in July compared to a 1.4% decline in June.

Commodities

- Crude oil prices fell 5 cents to \$69.15 a barrel on the NYMEX on global demand growth concerns.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Sep 5	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Sep 5	Sep 4
Monthly Inflation (CPI)	3.54% (Jul-24)	4.83% (Apr-24)	7.44% (Jul-23)	London Brent	72.69	72.7	78.41	90.04	USD	83.98	83.97
IIP	4.2% (Jun-24)	5% (Apr-24)	4% (Jun-23)	Crude Oil (\$/bbl)	69.15	69.2	74.07	86.69	GBP	110.52	110.15
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	71875	71295	71986	59356	Euro	93.18	92.83
GST Collection (in Rs cr)	174,962 (Aug-24)	172,739 (May-24)	159,069 (Aug-23)	Gold (Rs / 10 gm)#					100 Yen	58.49	57.89
				# ibjarates spot prices					Forex Reserve (\$ bn)*	681.69	674.66
				Source: Financial Websites, IBJA					Dollar Index	101.04	101.36

Source: CRISIL, Mospil, Financial Websites

*Data pertains to Aug 23 and to Aug 16 respectively

Source: RBI, Financial Websites

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