

Indian Indices	Mar 6	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74340	0.83	-9.02	0.34	20.70
Nifty 50	22545	0.93	-8.64	0.31	20.04
BSE Mid cap	40009	0.65	-16.07	0.78	31.72
Nifty Midcap	49348	0.37	-15.94	1.00	33.47
Nifty Smallcap	15400	1.32	-20.99	-1.13	26.39
BSE SmallCap	45265	1.63	-20.66	2.08	27.89

Source: BSE, NSE

Indian Indices	Mar 6	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	46971	0.76	-13.28	-3.27
BSE Bankex	55545	0.26	-8.94	1.79
BSE CD	54581	0.18	-16.90	3.91
BSE CG	58635	0.82	-19.47	-0.36
BSE FMCG	18844	1.15	-10.99	-2.69
BSE Healthcare	39702	1.16	-10.80	14.02
BSE IT	37507	0.33	-15.76	-0.29
BSE Metal	30103	2.64	-5.00	6.18
BSE Oil & Gas	23815	2.36	-12.86	-17.38
BSE Power	6189	1.37	-18.89	-8.65
BSE Realty	6381	-0.42	-23.96	-11.92

Source: BSE, NSE

Global Indices	Mar 6	1D % Chg	3M % Chg	1Y % Chg
DJIA	42579	-0.99	-4.62	10.13
Nasdaq	18069	-2.61	-9.02	12.71
FTSE 100	8683	-0.83	4.50	13.07
Nikkei 225	37705	0.77	-3.55	-5.95
Hang Seng	24370	3.29	22.67	48.25

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 5	MF Inv Feb 25	DII Inv Mar 6
Buy	15423	9000	13276
Sell	17313	6954	11658
Net	-1889	2046	1618
Net (YTD)	-129364	93782	162805

Source: NSDL, NSE

Debt Market Indicators	Mar 6	1D Ago
Repo Rate	6.25%	6.25%
Call Rate	5.75%	5.95%
10 Yr Gilt^	6.68%	6.72%
91-day T-bill^	6.46%	6.51%
182-day T Bill^	6.57%	6.59%
364-day T Bill^	6.54%	6.57%
3-mth CP rate	7.80%	7.80%
6-mth CP rate	7.88%	7.88%
1-yr CP rate	7.90%	7.88%
3-mth CD rate	7.54%	7.58%
6-mth CD rate	7.69%	7.69%
12-mth CD rate	7.66%	7.63%
5 yr Corp Bond	7.34%	7.36%
Net LAF o/s (Rs Cr)*	-183358	-217894
M3 supply (Rs lakh Cr)**	268.81	266.31
G-sec Volume (Rs Cr)	54445	44870
SDF*	183358	217894
1 Year OIS	6.20%	6.22%
US 10-year Treasury Yield	4.29%	4.28%

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

** Feb 7 and Jan 24 respectively

Indian Equity

- Indian equity benchmarks ended higher on Thursday as the Reserve Bank of India's liquidity measure boosted financial stocks, lower oil prices lifted energy stocks and US tariff relief improved sentiment.
- Top gainers were Asian Paints, Coal India, Hindalco, BPCL and NTPC, up 3.59-4.78%.
- Top losers were Tech Mahindra, Trent, Bharat Electronics Ltd, Kotak Mahindra Bank and HDFC Life, down 0.47-2.25%.

Global Equity

- Wall Street stocks ended lower on Thursday as trade policy uncertainty weighed on markets despite a temporary US tariff exemption for Canada and Mexico.
- FTSE index closed lower on Thursday dragged down by rising bond yields and US tariff uncertainty.
- Strait Times Index closed higher on Thursday, buoyed by gains in peer markets following China's stimulus measures.
- Nikkei Index closed higher on Thursday, as concerns over the impact of US President Donald Trump's tariff policy eased.
- Hang Seng Index closed higher on Thursday, amid hopes that China will introduce additional stimulus policies to achieve newly set annual growth target.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended lower at 5.75% on Thursday compared to 5.95% on Wednesday.
- Government bond prices ended higher on Thursday due to RBI's liquidity measures. However, uncertainty over the 10-year paper's inclusion in the central bank's debt purchase limited the gains.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.68% on Thursday compared to 6.71% on Wednesday.

Capital Market

- Kalpataru Projects International Ltd (KPIL) announced securing new orders worth Rs 2,306 crore in the domestic as well the international markets.
- BPTP's latest luxury project Amstoria Verti-Greens in Gurugram has achieved Rs 1,500 crore of inventory bookings on the first day of launch.
- Blue Star will invest Rs 400 crore in FY'26 to expand its manufacturing capacity across room air conditioners, commercial refrigeration, and commercial air conditioning segments.
- Knowledge Realty Trust, a joint venture between Sattva Group and Blackstone, filed a draft prospectus with Sebi to raise as much as Rs 6200 crore via IPO.
- CorporatEdge raised Rs 100 crore from private equity firm Carpediem Capital for expansion of its business.

Economy and Government

- S&P Global Commodity Insights said India's demand for spot cargoes of Liquefied Natural Gas (LNG) is expected to reduce as importers shift towards medium and long term contracts over the next two years, as a result of multiple deals that come into effect as early as next month.
- Finance Minister Nirmala Sitharaman stated that trade negotiations with Commerce Minister Piyush Goyal in the United States require close attention, as US President plans for reciprocal tariffs approaches.
- Union Finance Minister Nirmala Sitharaman launched the New Credit Assessment Model based on the scoring of digital footprints of MSMEs (micro, small and medium enterprises) in post-Budget interaction at Visakhapatnam.
- Union Minister for Parliamentary Affairs and Minority Affairs Kiren Rijiju stated that minorities in India are the "luckiest people", as the country provides exclusive schemes and welfare programmes for them, unlike anywhere else in the world.
- The Central government has finalised the outlines of the second phase of the India Semiconductor Mission (ISM) and is now holding internal discussions before rollout of the scheme which will support more ambitious design-linked innovations and design initiatives in the country.

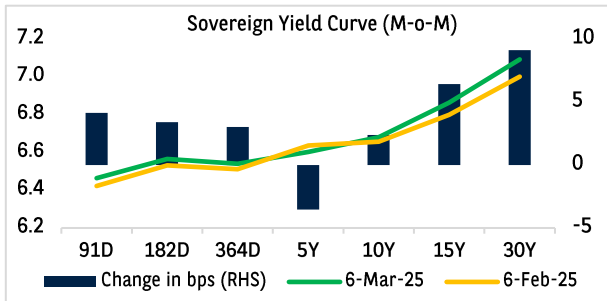
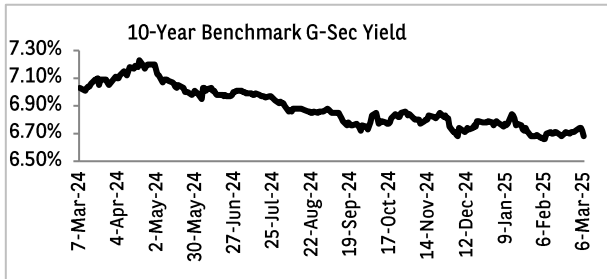
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	6,61,000	NA

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.57	7.77	8.54	8.56	9.81	10.28
1-Yr	6.58	7.57	8.34	8.36	9.61	10.08
3-Yr	6.55	7.38	8.15	8.17	9.42	9.89
5-Yr	6.60	7.34	8.23	8.24	9.50	9.97
10-Yr	6.68	7.34	8.23	8.24	9.50	9.97

G-sec and corporate bonds data as of Mar 6

* Weighted average yields; Source: CRISIL



International

- US posted a record trade deficit of \$131.4 billion in January 2025 up from a downwardly revised \$98.1 billion shortfall in December 2024.
- Eurozone HCOB Construction PMI declined to 42.7 in February compared to 45.4 in January.
- The ECB lowered the three key interest rates by 25 basis points, as expected, reducing the deposit facility rate to 2.50%, the main refinancing rate to 2.65%, and the marginal lending rate to 2.90%.
- Eurozone retail sales growth slowed to 1.5% on-year in January 2025 compared to a revised 2.2% in December 2024.
- UK S&P Global Construction PMI declined to 44.6 in February compared to 48.1 in January.

Commodities

- Crude oil prices rose marginally by 5 cents to \$66.36 a barrel on the NYMEX as US-Canada-China tariff concerns and OPEC+ output plans.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Mar 6	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Mar 6	Mar 5
Monthly Inflation (CPI)	4.31% (Jan-25)	6.21% (Oct-24)	5.1% (Jan-24)	London Brent Crude Oil (\$/bbl)	69.46	69.3	71.12	82.96	USD	87.09	87.09
IIP	3.2% (Dec-24)	3.1% (Nov-24)	4.4% (Dec-23)	NYMEX Crude Oil (\$/bbl)	66.36	66.31	67.2	79.13	GBP	112.33	111.45
GDP	6.2% (Oct-Dec FY25)	5.4% (Jul-Sep FY25)	8.6% (Oct-Dec FY24)	Gold (Rs / 10 gm)#	85876	86300	76187	64493	Euro	94.09	92.63
GST Collection (in Rs cr)	183,646 (Feb-25)	182,269 (Nov-24)	168,337 (Feb-24)	# ibjirates spot prices					100 Yen	58.50	58.19
				Source: Financial Websites, IBJA					Forex Reserve (\$ bn)*	640.48	635.72
									Dollar Index	104.16	105.74

Source: CRISIL, Mospi, Financial Websites

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