

Indian Indices	Sep 6	1D % Chg	3M % Chg	1Y % Chg	PE
S&P BSE Sensex	81184	-1.24	8.14	23.23	23.82
Nifty 50	24852	-1.17	8.90	26.73	23.11
BSE Mid cap	48505	-1.41	11.36	51.00	33.11
Nifty Midcap	58502	-1.59	11.62	45.22	43.67
Nifty Smallcap	19276	-1.25	14.56	52.08	30.23
BSE SmallCap	55978	-0.96	17.37	47.51	35.57

Source: BSE, NSE

Indian Indices	Sep 6	1D % Chg	3M % Chg	1Y % Chg
S&P BSE Auto	57659	-1.30	4.40	59.64
S&P BSE Bankex	57293	-1.93	2.02	15.20
S&P BSE CD	63874	-0.81	14.24	40.88
S&P BSE CG	71143	-1.70	4.80	55.18
S&P BSE FMCG	23098	-0.72	11.85	22.63
S&P BSE Healthcare	43468	-0.29	21.71	53.28
S&P BSE IT	42846	-1.05	23.35	31.32
S&P BSE Metal	31323	-0.64	-3.86	35.44
S&P BSE Oil & Gas	31706	-2.19	12.85	65.45
S&P BSE Power	7987	-1.37	6.22	74.78
S&P BSE Realty	8067	-0.86	-1.72	76.60

Source: BSE, NSE

Global Indices	Sep 6	1D % Chg	3M % Chg	1Y % Chg
DJIA	40345	-1.01	3.75	17.14
Nasdaq	16691	-2.55	-2.81	20.32
FTSE 100	8181	-0.73	-1.25	10.17
Nikkei 225	36391	-0.72	-5.97	9.48
Hang Seng	Closed	NA	NA	NA

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Sep 5	MF Inv Sep 2	DII Inv Sep 6
Buy	17880	9878	15699
Sell	18784	8885	13578
Net	-904	994	2122
Net (YTD)	51771	240425	317645

Source: NSDL, NSE

Debt Market Indicators	Sep 6	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.25%	6.24%
10 Yr Gilt^	6.85%	6.85%
91-day T-bill^	6.66%	6.63%
182-day T Bill^	6.70%	6.71%
364-day T Bill^	6.75%	6.72%
3-mth CP rate	7.64%	7.64%
6-mth CP rate	7.82%	7.88%
1-yr CP rate	7.90%	7.90%
3-mth CD rate	7.26%	7.25%
6-mth CD rate	7.51%	7.49%
12-mth CD rate	7.66%	7.65%
5 yr Corp Bond	7.48%	7.48%
Net LAF o/s (Rs Cr)*	-273350	-254092
M3 supply (Rs lakh Cr)**	257.03	257.27
G-sec Volume (Rs Cr)	44505	35945
SDF*	72703	93975
1 Year OIS	6.45%	6.47%
US 10-year Treasury Yield	3.72%	3.73%

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

\*\* Aug 23 and Aug 09 respectively

## Indian Equity

- Indian equities ended lower on Friday, as investors stayed cautious ahead of a key US jobs report that could affect Federal Reserve rate cuts.
- The top losers were SBI, BPCL, ICICI Bank, NTPC and HCL Technologies, down 1.92-4.43%.
- The top gainers were Asian Paints, Bajaj Finance, JSW Steel, Divi's Laboratories and LTIMindtree, up 0.26-1.09%.

## Global Equity

- Wall Street stocks ended lower on Friday as weak jobs data fueled worries over the health of the economy.
- FTSE index closed lower on Friday, weighed down by personal goods and auto stocks, as investors evaluated US jobs data for clues on potential Fed rate cuts.
- Strait Times Index closed lower on Friday with investors waiting for US employment data.
- Nikkei Index ended lower on Friday, pressured by a stronger yen and caution ahead of key US non-farm payrolls report.
- At 8.30 AM in the morning, Asian Markets were trading lower.

## Indian Debt

- The interbank call money rate ended marginally higher at 6.25% on Friday compared to 6.24% on Thursday.
- Government bond prices ended higher on Friday ahead of the release of the US non-farm payrolls data.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended marginally lower at 6.85% on Friday compared to 6.86% on Thursday.

## Capital Market

- Hexaware Technologies filed its preliminary draft papers with SEBI to raise Rs 9950 cr through an upcoming initial public offering (IPO).
- Shriram Finance plans to raise \$1 bn from overseas in the next 6 months to fund its business growth.
- Bank of Baroda raised Rs 5,000 cr through the sale of infrastructure bonds, garnering long-term funds to finance demand for loans amid a slower pace of deposit growth.
- Spicejet plans to raise over Rs 3,200 cr through various debt and equity instruments and capital infusion by the promoter.
- PNB Housing Finance is planning to raise \$100-\$125 mn through External Commercial Borrowing (ECB) in the third quarter of the financial year 2025 (Q3 FY25).

## Regulatory

- Sebi modified the reporting timeline for entities with listed commercial papers to disclose their payment obligations within one working day of the due date.
- The Insurance Regulatory and Development Authority of India (IRDAI) released a master circular on protection of policyholders' interests, which follows the regulations announced in March.

## Economy and Government

- RBI Governor Shaktikanta Das has emphasized the importance of addressing the 'last mile' in disinflation, a critical step in reducing inflation further.
- India's Forex reserves were up by \$2.3 bn to touch an all-time high of \$684 bn as of August 30.
- The government notified a uniform marketing code for the medical device industry on Saturday in order to curb unethical practices.
- The Ministry of Road Transport and Highways has constituted a panel of experts for the technical review of tunnel projects on National Highways.
- The Ministry of New and Renewable Energy (MNRE) notified draft norms for an approved list of models and manufacturers (ALMM) for solar cells, which is proposed to be effective from April 2026, similar to that for modules which has worked like a non-tariff barrier for domestic manufacturing.

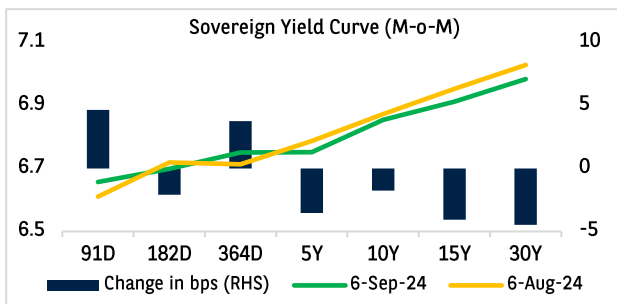
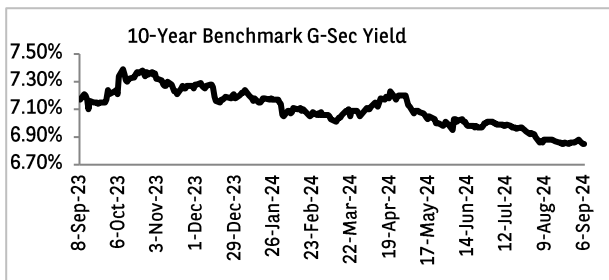
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	7,50,000	6,63,000	87,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.70	7.64	8.38	8.43	9.72	10.12
1-Yr	6.73	7.65	8.39	8.44	9.73	10.13
3-Yr	6.73	7.58	8.32	8.37	9.66	10.06
5-Yr	6.75	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 6

\* Weighted average yields; Source: CRISIL



## International

- US economy added 142000 jobs in August compared to downwardly revised 89000 in July.
- US U6 Unemployment Rate increased to 7.90% in August from 7.80% in July.
- Eurozone GDP expanded 0.6% year-on-year in the second quarter of 2024, compared to growth of 0.5% in the previous quarter.
- UK Halifax House Price Index increased 4.3% on year in August, following an upwardly revised 2.4% rise in July.
- China's annual inflation rate edged up to 0.6% in August from 0.5% in June
- The Japanese economy expanded 2.9% on year in Q2 from a marginally revised 2.4% contraction in Q1 while it grew by 0.7% on quarter from contraction of 0.6% in the previous quarter.
- Japan coincident index rose to 117.1 in July from 114.1 in June, leading economic index increased to 109.5 from a marginally revised 109.1.

## Commodities

- Crude oil prices fell \$1.48 to \$67.67 a barrel on the NYMEX following weaker than expected US jobs data.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Sep 6	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Sep 6	Sep 5
Monthly Inflation (CPI)	3.54% (Jul-24)	4.83% (Apr-24)	7.44% (Jul-23)	London Brent	71.06	72.69	79.87	90.6	USD	83.94	83.98
IIP	4.2% (Jun-24)	5% (Apr-24)	4% (Jun-23)	Crude Oil (\$/bbl)	71.06	72.69	79.87	90.6	GBP	110.60	110.52
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	67.67	69.15	75.55	87.54	Euro	93.30	93.18
GST Collection (in Rs cr)	174,962 (Aug-24)	172,739 (May-24)	159,069 (Aug-23)	Gold (Rs / 10 gm)#	71931	71875	72757	59329	100 Yen	58.81	58.49
				# ibjاراتes spot prices					Forex Reserve (\$ bn)*	683.99	681.69
				Source: Financial Websites, IBJA					Dollar Index	101.18	101.11

Source: CRISIL, Mospil, Financial Websites

\*Data pertains to Aug 30 and to Aug 23 respectively

Source: RBI, Financial Websites

Baroda BNP Paribas Asset Management India Pvt. Ltd.

(Formerly BNP Paribas Asset Management India Pvt. Ltd.)

Registered Office: Crescenzo, 2nd Floor, 201, Awing, G-Block, Bandra Kurla Complex, Mumbai - 400051

CIN: U74120MH2011PTC225365, Toll Free Number: 1800 - 2670 - 189 | Email: [service@barodabnp-paribasmf.in](mailto:service@barodabnp-paribasmf.in)

## Disclaimer:

This report is meant only for the information, Baroda BNP Paribas Asset Management India Private Limited (formerly BNP Paribas Asset Management India Private Limited) ("AMC") and shall not, under any circumstances, be construed as any form of outlook of the AMC on the equity, debt, or other securities markets or as a solicitation or advertisement for investing in any scheme of Baroda BNP Paribas Mutual Fund. All data and information contained in this report are provided by CRISIL Research, a division of CRISIL Limited (CRISIL) and have been prepared using publicly available information, including data developed in-house. CRISIL and the AMC does not take any responsibility with regard to the completeness, accuracy or usefulness of the data provided in this report. CRISIL, the AMC and/or any of either entities' directors, employees or agents, and the Trustees to Baroda BNP Paribas Mutual Fund circumstances, be held responsible for any inaccuracy, error, omission or staleness in the data or information contained in this report or be held liable for any loss or damage caused by any person's reliance on the contents of this report. It is the responsibility of the users of this report to evaluate the completeness, accuracy or usefulness of any data or information contained in this report and such users are advised to consult their own advisors on the implications of investing or dealing in mutual funds or other securities to which the contents of this report may be related. "Mutual Fund Investments are subject to market risks, read all scheme related documents carefully"

CRISIL Research, a division of CRISIL Limited (CRISIL) has taken due care and caution in preparing this Report based on the information obtained by CRISIL from sources which it considers reliable (Data). However, CRISIL does not guarantee the accuracy, adequacy or completeness of the Data / Report and is not responsible for any errors or omissions or for the results obtained from the use of Data / Report. This Report is not a recommendation to invest / disinvest in any entity covered in the Report and no part of this report should be construed as an investment advice. CRISIL especially states that it has no financial liability whatsoever to the subscribers/ users/ transmitters/ distributors of this Report. CRISIL Research operates independently of, and does not have access to information obtained by CRISIL's Ratings Division / CRISIL Risk and Infrastructure Solutions Limited (CRIS), which may, in their regular operations, obtain information of a confidential nature. The views expressed in this Report are that of CRISIL Research and not of CRISIL's Ratings Division / CRIS. No part of this Report may be published / reproduced in any form without CRISIL's prior written approval. CRISIL or its associates may have commercial transactions with the company/entity.