

Indian Indices	Sep 9	1D % Chg	3M % Chg	1Y % Chg	PE
S&P BSE Sensex	81560	0.46	6.34	22.46	23.93
Nifty 50	24936	0.34	7.07	25.81	23.19
BSE Mid cap	48367	-0.28	9.65	48.04	33.01
Nifty Midcap	58347	-0.26	9.69	42.39	43.55
Nifty Smallcap	19097	-0.93	10.93	49.06	29.95
BSE SmallCap	55614	-0.65	14.12	45.33	35.34

Source: BSE, NSE

Indian Indices	Sep 9	1D % Chg	3M % Chg	1Y % Chg
S&P BSE Auto	57538	-0.21	1.61	57.72
S&P BSE Bankex	57951	1.15	2.09	14.59
S&P BSE CD	64342	0.73	12.58	39.25
S&P BSE CG	70797	-0.49	2.83	48.72
S&P BSE FMCG	23478	1.65	12.43	25.27
S&P BSE Healthcare	43361	-0.24	19.45	53.33
S&P BSE IT	42584	-0.61	18.59	30.23
S&P BSE Metal	31083	-0.77	-6.60	33.33
S&P BSE Oil & Gas	31190	-1.63	9.00	60.07
S&P BSE Power	7953	-0.42	3.76	69.92
S&P BSE Realty	8041	-0.32	-3.85	69.91

Source: BSE, NSE

Global Indices	Sep 9	1D % Chg	3M % Chg	1Y % Chg
DJIA	40830	1.20	5.23	18.12
Nasdaq	16885	1.16	-1.45	22.69
FTSE 100	8271	1.09	0.31	10.60
Nikkei 225	36216	-0.48	-6.38	11.07
Hang Seng	17197	-1.42	-6.37	-5.52

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Sep 6	MF Inv Sep 5	DII Inv Sep 9
Buy	20265	8338	12173
Sell	18323	5031	10416
Net	1943	3306	1757
Net (YTD)	53714	246598	319402

Source: NSDL, NSE

Debt Market Indicators	Sep 9	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.40%	6.25%
10 Yr Gilt^	6.85%	6.85%
91-day T-bill^	6.63%	6.66%
182-day T Bill^	6.71%	6.70%
364-day T Bill^	6.72%	6.75%
3-mth CP rate	7.60%	7.64%
6-mth CP rate	7.82%	7.82%
1-yr CP rate	7.90%	7.90%
3-mth CD rate	7.26%	7.26%
6-mth CD rate	7.49%	7.51%
12-mth CD rate	7.66%	7.66%
5 yr Corp Bond	7.48%	7.48%
Net LAF o/s (Rs Cr)*	-173258	-172421
M3 supply (Rs lakh Cr)**	257.03	257.27
G-sec Volume (Rs Cr)	23925	44505
SDF*	112620	111783
1 Year OIS	6.46%	6.45%
US 10-year Treasury Yield	3.70%	3.72%

*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 snapped three-day losses on Monday, boosted by gains in banking and consumer stocks.
- The top gainers were HUL, Shriram Finance, ICICI Bank, ITC and Britannia, up 1.64-2.92%.
- The top losers were ONGC, Tech Mahindra, Hindalco, NTPC and BPCL, down 1.24-3.21%.

Global Equity

- Wall Street stocks ended higher on Monday as investors are awaiting upcoming inflation reports and the Federal Reserve's policy decision next week.
- FTSE index closed higher on Monday driven by travel and leisure stocks after an upbeat forecast from Entain, with investors awaiting labor market data.
- Straits Times Index closed higher on Monday, driven by gains in banking stocks.
- Nikkei Index ended lower on Monday following weaker-than-expected US jobs growth and sell-off in technology stocks.
- Hang Seng Index closed lower on Monday, following a weak Chinese inflation-fuelled slowdown fears in the country.
- At 8.30 AM in the morning, Asian Markets were trading higher.

Indian Debt

- The interbank call money rate ended higher at 6.40% on Monday compared to 6.25% on Friday.
- Government bond prices ended flat on Monday as investors remained on the sidelines ahead of the release of the US inflation data.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended flat at 6.85% on Monday.

Capital Market

- Bank of Baroda raised Rs 5000 cr at a coupon rate of 7.26 percent per annum through the issuance of long-term 10 yr infra bonds.
- Adani Green Energy Ltd (AGEL) redeemed \$750 mn worth of bonds as it deleverages business.
- Azure Power to prepay green bonds worth \$310 mn maturing in December 2024.
- GMR Airports Infrastructure will be acquiring a 10% interest in Delhi International Airport for a sum of \$126 mn.

Regulatory

- Sebi has notified rules to streamline the framework for the registration of Foreign Venture Capital Investors (FVCIs).
- The telecom regulator urges the Ministry of Electronics and IT to address the rise in spam and phishing on OTT apps like WhatsApp and Telegram.
- IRDAI revised rules for new health insurance policies have already taken effect from April 1, but insurance companies had been granted time till September 30, 2024 to ensure that existing products - the ones in force before the regulations were revised - comply with the norms, released in March and May this year.

Economy and Government

- GST Council decided that GST rates on cancer drugs will be brought lower to 5 percent from existing 12 percent.
- FM Sitharaman said any fund coming in for research will be exempt from GST, and there was complete unanimity on exemption of R&D fund to universities.
- The issue of compensation cess beyond March 2026 will be decided by the GoM, Finance Minister said, while also pointing out that the GoM would take a call on the additional Rs 40,000 crore collected after adjusting for loans and interest.
- FM said GST on Namkeens will be lowered from 18% to 12%.
- The Defence Ministry signed a Rs 26,000 cr deal with state-run aerospace giant Hindustan Aeronautics Ltd (HAL) to manufacture 240 aero-engines for Su-30MKI aircraft.

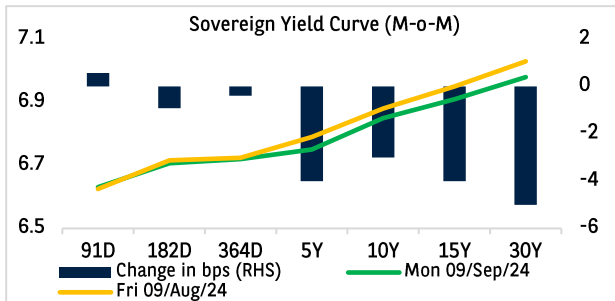
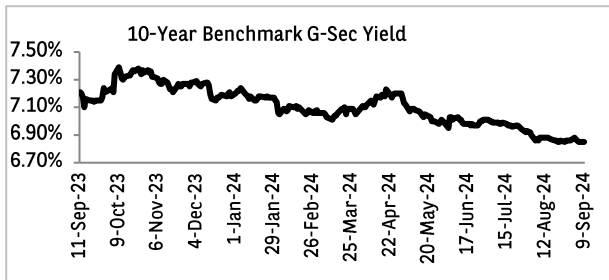
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	7,50,000	6,85,000	65,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.71	7.64	8.38	8.43	9.72	10.12
1-Yr	6.75	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 9

* Weighted average yields; Source: CRISIL



International

- US consumer inflation expectations for the year ahead were unchanged at 3% in August 2024, the same as in July and June
- Japan Economy Watchers Survey increased to 49.0 in August from 47.5 in July, while Economy Watchers Survey Outlook increased to 50.30 from 48.30.

Commodities

- Crude oil prices rose \$1.04 to \$68.71 a barrel on the NYMEX on concerns that a hurricane forecast in Louisiana may disrupt production and refining along the US Gulf Coast.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Sep 9	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Sep 9	Sep 6
Monthly Inflation (CPI)	3.54% (Jul-24)	4.83% (Apr-24)	7.44% (Jul-23)	London Brent	71.84	71.06	80.02	90.65	USD	83.95	83.94
IIP	4.2% (Jun-24)	5% (Apr-24)	4% (Jun-23)	Crude Oil (\$/bbl)	68.71	67.67	75.53	87.51	GBP	109.90	110.60
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	71378	71931	71913	59171	Euro	92.84	93.30
GST Collection (in Rs cr)	174,962 (Aug-24)	172,739 (May-24)	159,069 (Aug-23)	Gold (Rs / 10 gm)#					100 Yen	58.50	58.81
				# ibjarates spot prices					Forex Reserve (\$ bn)*	683.99	681.69
				Source: Financial Websites, IBJA					Dollar Index	101.67	101.18

Source: CRISIL, Mospil, Financial Websites

*Data pertains to Aug 30 and to Aug 23 respectively

Source: RBI, Financial Websites

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