

Indian Indices	Mar 10	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74115	-0.29	-9.07	-0.01	20.63
Nifty 50	22460	-0.41	-8.74	-0.15	19.96
BSE Mid cap	39307	-1.46	-18.06	-1.37	31.16
Nifty Midcap	48440	-1.53	-18.09	-1.07	32.85
Nifty Smallcap	15198	-1.97	-22.39	-3.25	26.04
BSE SmallCap	44645	-2.11	-22.36	-0.02	27.41

Source: BSE, NSE

Indian Indices	Mar 10	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	46525	-1.21	-13.52	-3.85
BSE Bankex	55232	-0.48	-9.39	1.54
BSE CD	52876	-2.04	-20.01	0.39
BSE CG	57698	-2.06	-21.34	-2.98
BSE FMCG	18857	0.11	-9.40	-3.57
BSE Healthcare	39189	-0.93	-11.53	12.30
BSE IT	37000	-0.53	-17.75	-1.97
BSE Metal	29936	-0.95	-6.38	4.17
BSE Oil & Gas	23314	-2.18	-14.20	-18.10
BSE Power	6127	-0.41	-19.47	-10.28
BSE Realty	6210	-1.94	-27.03	-14.18

Source: BSE, NSE

Global Indices	Mar 10	1D % Chg	3M % Chg	1Y % Chg
DJIA	41912	-2.08	-5.28	8.24
Nasdaq	17468	-4.00	-11.27	8.60
FTSE 100	8600	-0.92	3.86	12.28
Nikkei 225	37028	0.38	-5.94	-6.70
Hang Seng	23783	-1.85	17.09	45.43

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 7	MF Inv Mar 7	DII Inv Mar 10
Buy	9790	7477	9591
Sell	13005	6748	9328
Net	-3215	729	264
Net (YTD)	-135218	119070	165389

Source: NSDL, NSE

Debt Market Indicators	Mar 10	1D Ago
Repo Rate	6.25%	6.25%
Call Rate	6.25%	5.80%
10 Yr Gilt^	6.70%	6.69%
91-day T-bill^	6.48%	6.48%
182-day T Bill^	6.57%	6.57%
364-day T Bill^	6.55%	6.54%
3-mth CP rate	7.84%	7.81%
6-mth CP rate	7.91%	7.88%
1-yr CP rate	7.93%	7.90%
3-mth CD rate	7.57%	7.56%
6-mth CD rate	7.65%	7.66%
12-mth CD rate	7.59%	7.66%
5 yr Corp Bond	7.34%	7.34%
Net LAF o/s (Rs Cr)*	-63953	-62913
M3 supply (Rs lakh Cr)**	268.52	268.81
G-sec Volume (Rs Cr)	21790	23260
SDF*	63953	62913
1 Year OIS	6.19%	6.19%
US 10-year Treasury Yield	4.22%	4.32%

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

** Feb 21 and Feb 7 respectively

Indian Equity

- Indian equity benchmarks ended lower on Monday on weak global cues amid lingering worries about US trade tariffs.
- The top losers were ONGC, Trent, IndusInd Bank, Bajaj Auto and Eicher Motors, down 2.16-4.17%.
- The top gainers were Power Grid Corporation, HUL, Infosys, SBI Life Insurance and Nestle, up 0.44-3.04%.

Global Equity

- Wall Street stocks ended lower on Monday amid fear that relentless tariff conflicts may cause recession.
- FTSE index closed lower on Monday, weighed down by growth fears and US tariff uncertainties.
- Straits Times Index closed lower on Monday due to escalating worries over US-China trade conflicts.
- Nikkei Index closed higher on Monday, buoyed by gains in semiconductor-related stocks.
- Hang Seng Index closed lower on Monday, as weak consumer prices index data from China triggered deflation worries.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended higher at 6.25% on Monday compared to 5.80% on Friday.
- Government bond prices declined on Monday, ahead of state supplies and key inflation data from India and U.S.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended higher at 6.70% on Monday compared to 6.69% on Friday.

Capital Market

- Tata Capital plans to ring in up to \$750 million through external commercial borrowing (ECB) as part of its \$2 billion medium-term note (MTN) programme.
- Hindustan Zinc to raise capital by the issuance of unsecured, redeemable, rated, listed, nonconvertible debentures (NCDs) worth up to Rs 500 crore.
- NLC India received board's in-principle approved external commercial borrowings up to \$200 million, with an equivalent green shoe option.
- Gensol Engineering's Promoters will infuse Rs 28.99-crore liquidity in the company, through the conversion of warrants into equity.

Regulatory

- Sebi notified a stricter regulatory framework for small and medium enterprise (SME) IPOs by introducing a profitability requirement and imposing a 20% limit on offer-for-sale (OFS).
- Sebi said it has launched a certification course to foster knowledge about the concepts of Anti-Money Laundering (AML) and Combating the Financing of Terrorism (CFT) among the securities market intermediaries.

Economy and Government

- The government has sought approval from Parliament for a gross additional expenditure of Rs 6.79 lakh crore, involving a net cash outgo of Rs 51,463 crore, through the second supplementary demand for grants.
- Parliament passed a bill aimed at streamlining and modernizing railway operations in India with Railway Minister Ashwini Vaishnaw stating that the government was laying thrust on infrastructure development, safety and technology.
- The Maharashtra government has allocated Rs 36,000 crore for the Ladki Bahin scheme and proposed a 1% increase in the Motor Vehicle Tax on CNG and LPG vehicles, presenting a Rs 7,00,020 crore budget for 2025-26.
- The Maharashtra government proposed a 6% tax on electric vehicles priced more than Rs 30 lakh in the budget for the fiscal 2025-26.
- The Rajasthan government has drawn out a plan to boost tourism in the state.

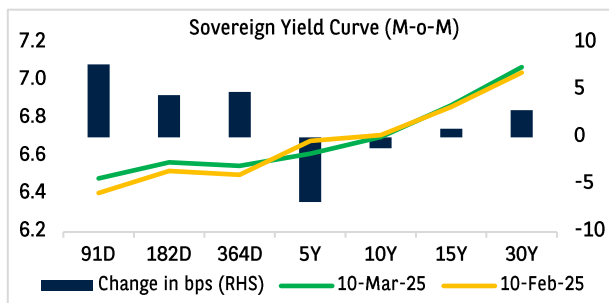
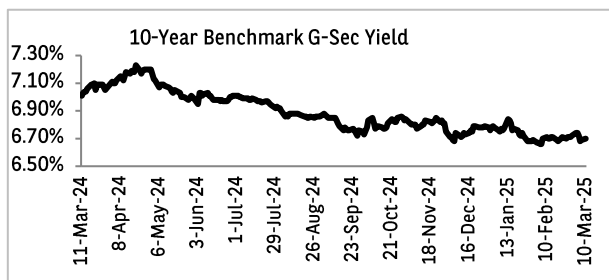
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	6,61,000	NA

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.57	7.80	8.57	8.59	9.84	10.31
1-Yr	6.59	7.57	8.34	8.36	9.61	10.08
3-Yr	6.58	7.38	8.15	8.17	9.42	9.89
5-Yr	6.61	7.34	8.23	8.24	9.50	9.97
10-Yr	6.70	7.34	8.23	8.24	9.50	9.97

G-sec and corporate bonds data as of Mar 10

* Weighted average yields; Source: CRISIL



International

- US Consumer Inflation Expectations rose 3.1% in February compared to 3% in January.
- The Japanese economy expanded by 2.2% on an annualized basis in Q4 2024, accelerating from an upwardly revised 1.4% growth in Q3.
- Japan's loan growth accelerated in February 2025 to 3.1% compared to 2.9% in January.
- Japan index of coincident economic indicators edged up to 116.2 in January 2025 compared to a downwardly revised 116.1 in December 2024 while the leading economic indicators index, rose to 108.0 from a downwardly revised 107.9.
- Japan Economy Watchers Survey declined to 45.6 in February 2025 compared to 48.6 in January 2025 while the Economy Watchers Survey Outlook decreased to 46.60 from 48.
- Japan Household spending increased by 0.8% on-year in January 2025 from a 27% rise in December 2024.

Commodities

- Crude oil prices fell \$1.01 to \$66.03 a barrel on the NYMEX on US tariff uncertainty and rising OPEC+ output.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Mar 10	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Mar 10	Mar 7
Monthly Inflation (CPI)	4.31% (Jan-25)	6.21% (Oct-24)	5.1% (Jan-24)	London Brent	69.28	70.36	72.19	82.08	USD	87.24	87.06
IIP	3.2% (Dec-24)	3.1% (Nov-24)	4.4% (Dec-23)	Crude Oil (\$/bbl)	66.03	67.04	68.59	78.01	GBP	112.67	112.22
GDP	6.2% (Oct-Dec FY25)	5.4% (Jul-Sep FY25)	8.6% (Oct-Dec FY24)	NYMEX Crude Oil (\$/bbl)	66.03	67.04	68.59	78.01	Euro	94.55	94.20
GST Collection (in Rs cr)	183,646 (Feb-25)	182,269 (Nov-24)	168,337 (Feb-24)	Gold (Rs / 10 gm)#	85932	86059	77175	64955	100 Yen	59.06	59.02
				# ibjirates spot prices					Forex Reserve (\$ bn)*	638.70	640.48
				Source: Financial Websites, IBJA					Dollar Index	103.73	103.84

Source: CRISIL, Mospi, Financial Websites

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