

Indian Indices	Sep 10	1D % Chg	3M % Chg	1Y % Chg	PE
S&P BSE Sensex	81921	0.44	7.10	23.01	24.03
Nifty 50	25041	0.42	7.66	26.34	23.29
BSE Mid cap	48625	0.53	9.62	48.83	33.19
Nifty Midcap	59039	1.19	10.90	44.08	44.07
Nifty Smallcap	19317	1.15	10.54	50.77	30.29
BSE SmallCap	56468	1.53	14.68	47.56	35.88

Source: BSE, NSE

Indian Indices	Sep 10	1D % Chg	3M % Chg	1Y % Chg
S&P BSE Auto	57710	0.30	1.96	58.19
S&P BSE Bankex	58095	0.25	2.27	14.87
S&P BSE CD	64974	0.98	13.19	40.62
S&P BSE CG	71558	1.07	3.93	50.32
S&P BSE FMCG	23560	0.35	12.65	25.70
S&P BSE Healthcare	43836	1.10	19.84	55.00
S&P BSE IT	43231	1.52	22.22	32.21
S&P BSE Metal	31134	0.16	-6.13	33.55
S&P BSE Oil & Gas	31061	-0.42	8.84	59.41
S&P BSE Power	8092	1.74	5.16	72.87
S&P BSE Realty	8115	0.92	-4.25	71.47

Source: BSE, NSE

Global Indices	Sep 10	1D % Chg	3M % Chg	1Y % Chg
DJIA	40737	-0.23	4.81	17.85
Nasdaq	17026	0.84	-0.97	23.72
FTSE 100	8206	-0.78	-0.27	9.73
Nikkei 225	36159	-0.16	-7.37	10.89
Hang Seng	17234	0.22	-6.17	-5.32

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Sep 9	MF Inv Sep 6	DII Inv Sep 10
Buy	15087	11433	12154
Sell	13952	10705	12429
Net	1134	728	-275
Net (YTD)	54849	247326	319126

Source: NSDL, NSE

Debt Market Indicators	Sep 10	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.40%	6.40%
10 Yr Gilt^	6.85%	6.85%
91-day T-bill^	6.63%	6.63%
182-day T Bill^	6.72%	6.71%
364-day T Bill^	6.71%	6.72%
3-mth CP rate	7.65%	7.60%
6-mth CP rate	7.82%	7.82%
1-yr CP rate	7.85%	7.90%
3-mth CD rate	7.28%	7.26%
6-mth CD rate	7.50%	7.49%
12-mth CD rate	7.65%	7.66%
5 yr Corp Bond	7.48%	7.48%
Net LAF o/s (Rs Cr)*	-142291	-173258
M3 supply (Rs lakh Cr)**	257.03	257.27
G-sec Volume (Rs Cr)	32990	23925
SDF*	81653	112620
1 Year OIS	6.44%	6.46%
US 10-year Treasury Yield	3.65%	3.70%

*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 higher on Tuesday as pharma stocks rallied on the government's decision to lower goods and services tax on select cancer drugs. Investors await key US inflation data and the Federal Reserve's policy decision for further cues.
- The top gainers were Divi's Laboratories, LTIMindtree, Bharti Airtel, Wipro and HCLTech, up 1.85-4.89%.
- The top losers were HDFC Life, SBI Life Insurance, Bajaj Finserv, Shriram Finance and Bajaj Finance, down 1.44-4.47%.

Global Equity

- Wall Street stocks ended mixed on Tuesday with Nasdaq ending higher as tech stocks gained while Dow Jones fell as banking and energy stocks declined after warnings of quarterly weakness.
- FTSE index ended lower on Tuesday dragged down by healthcare and energy stocks.
- Straits Times index closed higher on Tuesday, driven by an overnight rally on Wall Street.
- Nikkei 225 index ended lower on Tuesday as investors remained cautious ahead of the closely tracked US inflation report and the Federal Reserve's policy decision.
- Hang Seng index closed higher on Tuesday, boosted by a rally in the Alibaba stock and stronger-than-expected export data from China.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended flat at 6.40% on Tuesday.
- Government bond prices ended flat on Tuesday due to lack of fresh cues and as investors await for the US inflation data.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended flat at 6.85% on Tuesday.

Capital Market

- Swiggy plans to raise Rs 5,000 cr from its upcoming initial public offering (IPO) via fresh issue of shares.
- Sona BLW Precision Forgings Ltd garnered Rs 2,400 cr through a Qualified Institutional Placement (QIP) of equity shares.
- Ventive Hospitality filed preliminary papers with Sebi to raise Rs 2,000 cr through an IPO.
- Playbook Partners has raised \$130 mn from a clutch of investors under its maiden \$250-million growth capital fund.
- Northern Arc Capital Ltd looks to launch its Rs 500 cr IPO, from September 16 to 19.
- Western Carriers (India) Ltd fixed a price band of Rs 163 -172 per share for its Rs 493 cr IPO.
- Mrs Bectors Food Specialities Ltd raised Rs 400 cr through a Qualified Institutional Placement (QIP) of equity shares.

Regulatory

- The Department of Telecommunications (DoT) has simplified the approval process for issuance of experimental and demonstration licenses with the introduction of fixed timelines.
- The Competition Commission of India approved the merger of Tata Motor Finance with Tata Capital.

Economy and Government

- Revenue Secretary Sanjay Malhotra clarified that the newly introduced Section 11A of the GST Act 2017, through an amendment, will be used in "rarest of the rare cases" to offer retrospective Goods and Services Tax (GST) relief.
- Union heavy industries minister H D Kumaraswamy said The government has received investment proposals worth around Rs 75,000 cr under the auto PLI scheme of which close to Rs 18,000 cr has already been invested.

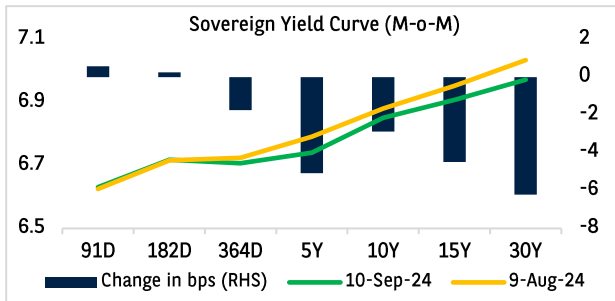
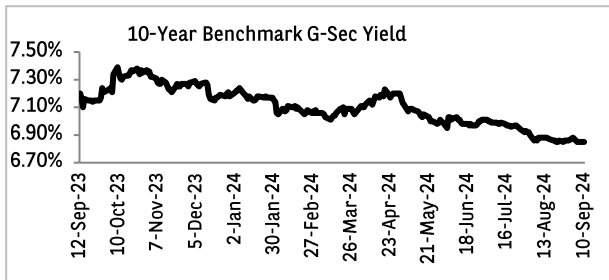
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	7,50,000	6,85,000	65,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.72	7.65	8.39	8.44	9.73	10.13
1-Yr	6.74	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	6.74	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 10

* Weighted average yields; Source: CRISIL



International

- US NFIB Small Business Optimism Index decreased to 91.2 in August, the lowest in three months, compared to 93.7 in July.
- UK unemployment rate fell to 4.1% in July compared to 4.2% in June.
- China Trade surplus surged to \$91.02 bn in July compared with \$84.65 bn in June with exports rising 8.7% compared with 7% growth, while imports declined 0.5% compared with a 7.2% rise.

Commodities

- Crude oil prices plunged \$2.96 to \$65.75 a barrel on the NYMEX after OPEC trimmed demand forecast.
- EIA said Global oil demand is expected to average around 103.1 million barrels per day this year, some 200,000 bpd higher than its previous forecast of 102.9 million bpd.
- OPEC in a monthly report said world oil demand will rise by 2.03 mn barrels per day (bpd) in 2024, down from growth of 2.11 mn bpd it expected last month.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Sep 10	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Sep 10	Sep 9
Monthly Inflation (CPI)	3.54% (Jul-24)	4.83% (Apr-24)	7.44% (Jul-23)	London Brent	69.19	71.84	81.63	90.65	USD	83.97	83.95
IIP	4.2% (Jun-24)	5% (Apr-24)	4% (Jun-23)	Crude Oil (\$/bbl)	65.75	68.71	77.74	87.51	GBP	109.99	109.90
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	71590	71378	71176	59171	Euro	92.71	92.84
GST Collection (in Rs cr)	174,962 (Aug-24)	172,739 (May-24)	159,069 (Aug-23)	Gold (Rs / 10 gm)#					100 Yen	58.65	58.50
				# ibjarates spot prices					Forex Reserve (\$ bn)*	683.99	681.69
				Source: Financial Websites, IBJA					Dollar Index	101.44	101.55

Source: CRISIL, Mospil, Financial Websites

*Data pertains to Aug 30 and to Aug 23 respectively

Source: RBI, Financial Websites

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