

Indian Indices	Mar 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74102	-0.02	-9.11	0.82	20.63
Nifty 50	22498	0.17	-8.70	0.74	20.00
BSE Mid cap	39590	0.72	-17.67	-0.43	31.39
Nifty Midcap	48763	0.67	-17.76	-0.02	33.07
Nifty Smallcap	15076	-0.80	-23.31	-2.08	25.83
BSE SmallCap	44330	-0.70	-23.18	1.32	27.22

Source: BSE, NSE

Indian Indices	Mar 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	46481	-0.09	-13.92	-3.37
BSE Bankex	55034	-0.36	-9.44	2.32
BSE CD	53130	0.48	-20.10	1.73
BSE CG	57969	0.47	-21.15	-1.97
BSE FMCG	18828	-0.15	-9.84	-3.04
BSE Healthcare	39326	0.35	-11.49	12.59
BSE IT	36678	-0.87	-18.75	-2.26
BSE Metal	30121	0.62	-5.92	6.30
BSE Oil & Gas	23683	1.58	-12.98	-16.17
BSE Power	6134	0.11	-19.10	-9.20
BSE Realty	6453	3.92	-24.21	-9.77

Source: BSE, NSE

Global Indices	Mar 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	41433	-1.14	-6.15	6.87
Nasdaq	17436	-0.18	-12.97	8.84
FTSE 100	8496	-1.21	2.34	10.78
Nikkei 225	36793	-0.64	-6.55	-5.22
Hang Seng	23782	-0.01	18.00	43.37

Source: Financial websites

Rs. Cr (Equity)	FII Inv Mar 10	MF Inv Mar 7	DII Inv Mar 11
Buy	12337	7477	10896
Sell	12835	6748	8894
Net	-498	729	2002
Net (YTD)	-135716	119070	167390

Source: NSDL, NSE

Debt Market Indicators	Mar 11	1D Ago
Repo Rate	6.25%	6.25%
Call Rate	5.80%	6.25%
10 Yr Gilt^	6.69%	6.70%
91-day T-bill^	6.49%	6.48%
182-day T Bill^	6.57%	6.57%
364-day T Bill^	6.53%	6.55%
3-mth CP rate	7.87%	7.84%
6-mth CP rate	7.93%	7.91%
1-yr CP rate	7.95%	7.93%
3-mth CD rate	7.57%	7.57%
6-mth CD rate	7.66%	7.65%
12-mth CD rate	7.59%	7.59%
5 yr Corp Bond	7.34%	7.34%
Net LAF o/s (Rs Cr)*	-85688	-63953
M3 supply (Rs lakh Cr)**	268.52	268.81
G-sec Volume (Rs Cr)	31560	21790
SDF*	85688	63953
1 Year OIS	6.17%	6.19%
US 10-year Treasury Yield	4.28%	4.22%

*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 closed mixed on Tuesday as realty gains offset losses in the IT and banking stocks amid fears of recession in the US.
- The top gainers were Trent, BPCL, Sun Pharma, ICICI Bank and Shriram Finance, which were up 2.02-4.08%.
- The top losers were IndusInd Bank, Infosys, Mahindra & Mahindra, Bajaj Finserv and Power Grid Corporation, which were down 1.47-27.16%.

Global Equity

- Wall Street stocks ended lower on Tuesday as US President escalated the trade concerns by doubling tariffs on Canadian steel and aluminum.
- FTSE index closed lower on Tuesday weighed down by travel stocks and fresh US tariff concerns.
- Strait Times Index closed lower on Tuesday as investors remained cautious about risks of recession in the US.
- Nikkei Index closed lower on Tuesday, owing to Wall Street's sharp losses overnight amid relentless concerns over tariff conflict.
- Hang Seng Index closed marginally lower on Tuesday amid concerns that escalating US trade policies could hinder economic growth and increase recession risk.
- At 8.30 AM in the morning, Asian Markets were trading mixed.

Indian Debt

- The interbank call money rate ended lower at 5.80% on Tuesday compared to 6.25% on Monday.
- Government bond prices were little changed on Tuesday as investors awaited inflation data from India and the US.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.69% on Tuesday compared to 6.70% on Monday.

Capital Market

- TCS' board approved to acquire Darshita Southern India Happy Homes Private Limited for Rs 2,250 crore.
- Godrej Agrovet received the board's approval for the acquisition of the remaining 48.06% equity stake in Creamline Dairy Products Limited (CDPL), making it a wholly owned subsidiary of the company. The cost of the acquisition is Rs 930 crore.
- Zydus Lifesciences received board of directors' approval for the acquisition of 85.6% equity shares of orthopaedic technology firm Amplitude Surgical SA, France, for €256.8 million (or Rs 2,430 crore).
- Bessemer raised \$350 million in India fund to back new-age companies.
- Zolve announced that it had secured \$251 million in a Series B round of fundraising.

Regulatory

- The RBI said with the normalisation of post-pandemic pent-up demand conditions, the growth in net sales of select FDI companies moderated to 9.3% during 2023-24 from the high of 20.3% in the previous year.
- SEBI made it mandatory to complete the rights issue within 23 working days from the date of its approval by the company's board of directors.

Economy and Government

- India and Qatar have signed an agreement to promote and develop mutual collaboration in public-private partnership framework and investment, use of financing tools, as well as economic policies.
- Prime Minister Narendra Modi announced the issuance of OCI cards to Mauritian leaders during his visit, emphasizing India's commitment to its diaspora and bilateral relations.
- Finance Minister Nirmala Sitharaman announced on Tuesday a Rs 500 crore corpus for Manipur to establish a contingency fund.
- Maharashtra State Road Development Corporation secured funding commitments of Rs 21,500 crore from lenders for a road project near Mumbai.

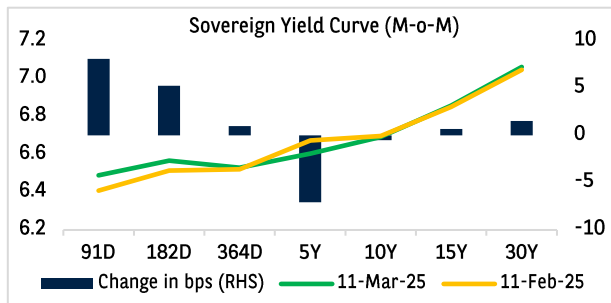
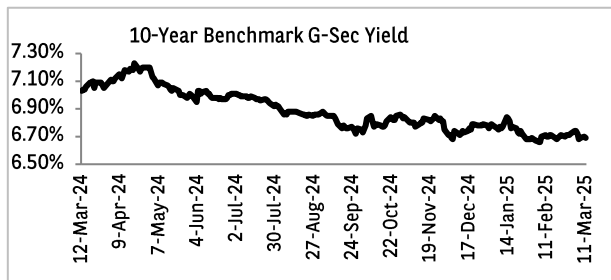
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	6,61,000	NA

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.57	7.83	8.60	8.62	9.87	10.34
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	6.60	7.34	8.23	8.24	9.50	9.97
10-Yr	6.69	7.34	8.23	8.24	9.50	9.97

G-sec and corporate bonds data as of Mar 11

* Weighted average yields; Source: CRISIL



International

- US JOLTs Job Openings increased to 7.74 million in January 2025, up from a revised 7.51 million in December.
- US NFIB Small Business Optimism Index dropped 2.1 points to 100.7 in February 2025 compared to 102.8 in January 2025.
- Japan machine tool orders rose by 3.5% on-year in February 2025 compared to 4.7% growth in January 2025.

Commodities

- Crude oil prices rose 22 cents to \$66.25 a barrel on the NYMEX due to weaker dollar index.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Mar 11	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Mar 11	Mar 10
Monthly Inflation (CPI)	4.31% (Jan-25)	6.21% (Oct-24)	5.1% (Jan-24)	London Brent	69.56	69.28	73.52	82.21	USD	87.33	87.24
IIP	3.2% (Dec-24)	3.1% (Nov-24)	4.4% (Dec-23)	Crude Oil (\$/bbl)	66.25	66.03	70.29	77.93	GBP	112.63	112.67
GDP	6.2% (Oct-Dec FY25)	5.4% (Jul-Sep FY25)	8.6% (Oct-Dec FY24)	NYMEX Crude Oil (\$/bbl)	86024	85932	77666	65646	Euro	94.90	94.55
GST Collection (in Rs cr)	183,646 (Feb-25)	182,269 (Nov-24)	168,337 (Feb-24)	Gold (Rs / 10 gm)#					100 Yen	59.30	59.06
				# ibjirates spot prices					Forex Reserve (\$ bn)*	638.70	640.48
				Source: Financial Websites, IBIA					Dollar Index	103.49	103.91

Source: CRISIL, Mospi, Financial Websites

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