

Indian Indices	Sep 11	1D % Chg	3M % Chg	1Y % Chg	PE
S&P BSE Sensex	81523	-0.49	6.63	21.45	23.92
Nifty 50	24918	-0.49	7.11	24.61	23.17
BSE Mid cap	48372	-0.52	8.25	46.29	33.02
Nifty Midcap	58938	-0.17	9.82	42.21	43.99
Nifty Smallcap	19162	-0.81	9.05	47.60	30.05
BSE SmallCap	56148	-0.57	12.96	45.71	35.66

Source: BSE, NSE

Indian Indices	Sep 11	1D % Chg	3M % Chg	1Y % Chg
S&P BSE Auto	57036	-1.17	-0.12	53.90
S&P BSE Bankex	57851	-0.42	2.10	13.20
S&P BSE CD	65081	0.16	13.42	40.38
S&P BSE CG	71434	-0.17	2.33	49.61
S&P BSE FMCG	23595	0.15	13.13	24.80
S&P BSE Healthcare	43805	-0.07	20.02	54.04
S&P BSE IT	43107	-0.29	21.87	31.04
S&P BSE Metal	30714	-1.35	-7.32	30.54
S&P BSE Oil & Gas	30361	-2.25	4.47	55.07
S&P BSE Power	8072	-0.24	4.45	69.01
S&P BSE Realty	8016	-1.22	-6.40	67.89

Source: BSE, NSE

Global Indices	Sep 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	40862	0.31	5.46	17.88
Nasdaq	17396	2.17	0.30	24.99
FTSE 100	8194	-0.15	0.57	9.30
Nikkei 225	35620	-1.49	-8.98	9.71
Hang Seng	17109	-0.73	-5.87	-5.46

Source: Financial websites

Rs. Cr (Equity)	Fill Inv Sep 10	MF Inv Sep 9	DII Inv Sep 11
Buy	17619	11433	11402
Sell	14657	10705	11171
Net	2962	728	231
Net (YTD)	57811	247326	319357

Source: NSDL, NSE

Debt Market Indicators	Sep 11	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	5.75%	6.40%
10 Yr Gilt^	6.83%	6.85%
91-day T-bill^	6.64%	6.63%
182-day T Bill^	6.70%	6.72%
364-day T Bill^	6.70%	6.71%
3-mth CP rate	7.70%	7.65%
6-mth CP rate	7.85%	7.82%
1-yr CP rate	7.90%	7.85%
3-mth CD rate	7.28%	7.28%
6-mth CD rate	7.49%	7.50%
12-mth CD rate	7.65%	7.65%
5 yr Corp Bond	7.48%	7.48%
Net LAF o/s (Rs Cr)*	-116623	-142291
M3 supply (Rs lakh Cr)**	257.03	257.27
G-sec Volume (Rs Cr)	74445	32990
SDF*	104380	81653
1 Year OIS	6.37%	6.44%
US 10-year Treasury Yield	3.65%	3.65%

*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 Wednesday as investors awaited key US inflation data, which could impact Federal Reserve's interest policy decision.
- The top losers were Tata Motors, ONGC, Wipro, SBI and Hindalco, down 1.79-5.74%.
- The top gainers were Bajaj Auto, Asian Paints, Bajaj Finance, Britannia and Shriram Finance, up 0.61-3.94%.

Global Equity

- Wall Street stocks ended higher on Wednesday as gains in the technology sector.
- FTSE index closed lower on Wednesday weighed down by a drop in Rentokil shares, while investors evaluated the latest US inflation data.
- Straits Times index closed higher on Wednesday on stock-specific gains.
- Nikkei index ended lower on Wednesday as the yen hit its strongest level against the dollar this year.
- Hang Seng index closed lower on Wednesday as a drop in crude oil prices reignited concerns over global growth.
- At 8.30 AM in the morning, Asian Markets were trading higher.

Indian Debt

- The interbank call money rate ended lower at 5.75% on Wednesday compared to 6.40% on Tuesday.
- Government bond prices ended higher on Wednesday due to a sharp fall in the US treasury yield and global crude oil prices.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended lower at 6.83% on Wednesday compared to 6.85% on Tuesday.

Capital Market

- Vedanta Resources secured \$900 mn in its first dollar bond issue in more than two years at a coupon of 10.875%.
- Tata Steel secured funding of GBP 500 mn from the UK government for building a low-carbon electric arc furnace (EAF) in Port Talbot.
- Northern Arc Capital fixed a price band of Rs 249-263 per share for its upcoming Rs 777 cr initial public offering (IPO).
- InMobi raised \$100 mn in debt financing from Mars Growth Capital.
- Ramkrishna Forgings sold its 100% equity stake in Globe All India Services Limited to Yatra Online Limited for Rs 128 cr.

Regulatory

- The Reserve Bank of India plans to maintain a 5% run-off factor on digitally linked deposits.
- Sebi allowed securities funded through cash collateral to be considered as maintenance margin for margin trading facility (MTF).

Economy and Government

- Chief Economic Advisor V Anantha Nageswaran said artificial intelligence (AI) can both augment and displace labour, and there is a need to choose the right balance between the two. The onus is as much on the government as on the private sector to think about the medium-term consequences of AI.
- PM Narendra Modi said India is one the first counties amongst the G20 nations to fulfill Paris commitments on Green Energy, nine years ahead of the 2030 target.
- The union cabinet approved the fourth phase of the flagship rural roads program called the Pradhan Mantri Gram Sadak Yojana (PMGSY) with an estimated outlay of around Rs 70,125 cr spread over the next five years starting from Fy-25
- The Union Cabinet approved a Rs 12,461 cr outlay to support the development of 31,350 MW hydropower projects to be implemented over the next eight years.
- India and the UAE signed a Memorandum of Understanding to collaborate on the operation and maintenance of nuclear plants.

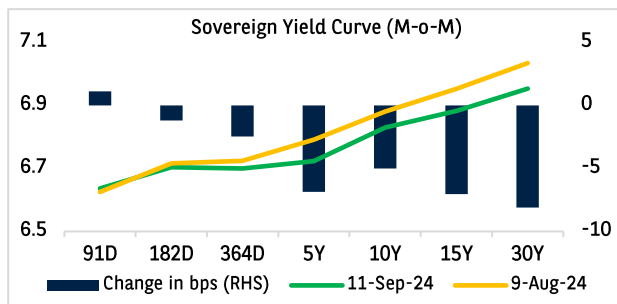
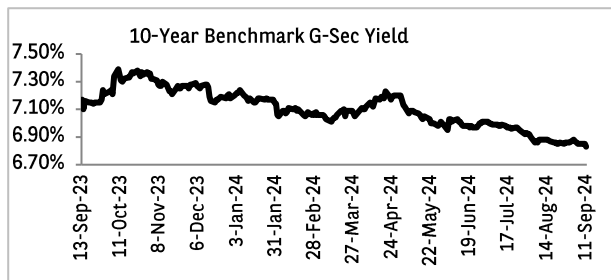
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	7,50,000	6,85,000	65,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.70	7.67	8.41	8.46	9.75	10.15
1-Yr	6.74	7.65	8.39	8.44	9.73	10.13
3-Yr	6.72	7.58	8.32	8.37	9.66	10.06
5-Yr	6.72	7.48	8.33	8.38	9.67	10.07
10-Yr	6.83	7.37	8.22	8.27	9.56	9.96

G-sec and corporate bonds data as of Sep 11

* Weighted average yields; Source: CRISIL



International

- US inflation rate slowed for a fifth consecutive month to 2.5% in August, the lowest since February 2021, from 2.9% in July while core consumer price inflation rate stood at an over three-year low of 3.2%.
- UK economy expanded 1.2% on year in July, higher than 0.7% in June.
- UK industrial production fell 1.2% on year in July compared to a 1.4% decline in June while manufacturing production decreased 1.3% from a 1.5% fall.
- UK trade deficit surged to GBP 7.51 bn in July compared to GBP 5.32 bn in June.
- UK construction output declined 1.6% on-year in July from a 1.7% decline in the previous month.
- Japan Producer prices increased by 2.5% on year in August compared to a 3.0% growth in July.

Commodities

- Crude oil prices rose \$1.56 to \$67.31 a barrel on the NYMEX on supply concerns following fear of Hurricane Francine.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Sep 11	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Sep 11	Sep 10
Monthly Inflation (CPI)	3.54% (Jul-24)	4.83% (Apr-24)	7.44% (Jul-23)	London Brent	70.61	69.19	81.92	90.64	USD	83.97	83.97
IIP	4.2% (Jun-24)	5% (Apr-24)	4% (Jun-23)	Crude Oil (\$/bbl)	67.31	65.75	77.9	87.29	GBP	109.90	109.99
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	NYMEX Crude Oil (\$/bbl)	67.31	65.75	77.9	87.29	Euro	92.73	92.71
GST Collection (in Rs cr)	174,962 (Aug-24)	172,739 (May-24)	159,069 (Aug-23)	Gold (Rs / 10 gm)#	71994	71590	71445	59199	100 Yen	59.29	58.65
				# ibjارات spot prices					Forex Reserve (\$ bn)*	683.99	681.69
				Source: Financial Websites, IBJA					Dollar Index	101.79	101.63

Source: CRISIL, Mospi, Financial Websites

*Data pertains to Aug 30 and to Aug 23 respectively

Source: RBI, Financial Websites

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