

Indian Indices	Dec 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81526	0.02	0.00	16.58	23.28
Nifty 50	24642	0.13	-1.11	17.36	22.68
BSE Mid cap	48085	0.25	-0.59	35.03	41.23
Nifty Midcap	59293	0.27	0.60	32.56	43.43
Nifty Smallcap	19657	0.38	2.59	35.33	36.41
BSE SmallCap	57703	0.35	2.77	39.40	34.66

Source: BSE, NSE

Indian Indices	Dec 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53996	0.37	-5.33	32.70
BSE Bankex	60768	-0.31	5.04	13.70
BSE CD	66495	0.59	2.17	35.83
BSE CG	73519	0.24	2.92	37.15
BSE FMCG	20882	0.34	-11.50	7.10
BSE Healthcare	44433	0.30	1.43	47.03
BSE IT	45140	0.35	4.72	32.28
BSE Metal	32016	0.12	4.24	28.03
BSE Oil & Gas	27217	0.16	-10.36	22.63
BSE Power	7582	-0.34	-6.07	33.38
BSE Realty	8515	0.06	6.23	44.14

Source: BSE, NSE

Global Indices	Dec 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	44149	-0.22	8.04	21.27
Nasdaq	20035	1.77	15.17	38.82
FTSE 100	8302	0.26	1.31	10.03
Nikkei 225	39372	0.01	10.53	20.07
Hang Seng	20155	-0.77	17.81	24.40

Source: Financial websites

Rs. Cr (Equity)	FII Inv Dec 10	MF Inv Dec 9	DII Inv Dec 11
Buy	20920	8427	11396
Sell	19053	9643	9388
Net	1867	-1215	2008
Net (YTD)	9019	396462	496559

Source: NSDL, NSE

Debt Market Indicators	Dec 11	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.75%	6.74%
10 Yr Gilt^	6.72%	6.71%
91-day T-bill^	6.43%	6.44%
182-day T Bill^	6.59%	6.55%
364-day T Bill^	6.55%	6.53%
3-mth CP rate	7.40%	7.40%
6-mth CP rate	7.65%	7.65%
1-yr CP rate	7.80%	7.80%
3-mth CD rate	7.14%	7.15%
6-mth CD rate	7.41%	7.40%
12-mth CD rate	7.47%	7.47%
5 yr Corp Bond	7.24%	7.24%
Net LAF o/s (Rs Cr)*	-52720	-73007
M3 supply (Rs lakh Cr)**	262.90	264.77
G-sec Volume (Rs Cr)	34455	60180
SDF*	53024	73311
1 Year OIS	6.37%	6.37%
US 10-year Treasury Yield	4.26%	4.22%

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

\*\* Nov 15 and Nov 1 respectively

## Indian Equity

- Indian equities ended flat on Wednesday, with gains in consumer durables and IT stocks offset by losses in bank stocks, as investors awaited US and India's inflation data for insights into the trajectory of interest rates.
- The top gainers were Trent, Bajaj Finance, Britannia, Shriram Finance and Bajaj Finserv, up 1.39-2.69%.
- The top losers were JSW Steel, Adani Ports, NTPC, SBI and Axis Bank, down 0.55-1.26%.

## Global Equity

- Wall Street stocks ended lower on Wednesday as technology stocks fell amid concerns the Fed may delay rate cuts following strong US inflation data.
- FTSE index ended marginally higher on Wednesday as lower bond yields boosted housing and real estate stocks.
- Strait Times Index closed lower on Wednesday, primarily because of losses in bank stocks.
- Nikkei index closed marginally higher on Wednesday on short covering, with investors exercising caution ahead of key US inflation data that could dictate the US Federal Reserve's rate cut decision.
- Hang Seng Index ended lower on Wednesday, on cautious investor sentiment with regard to China's policy measures.
- At 8.30 AM in the morning, Asian Markets were trading lower.

## Indian Debt

- The interbank call money rate closed higher at 6.75% on Wednesday compared to 6.74% on Tuesday.
- Government bond prices ended lower on Wednesday, as traders awaited the inflation data from the world's largest economy and India for further cues on interest rates.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended higher at 6.72% on Wednesday compared to 6.71% on Tuesday.

## Capital Market

- CarDekho's South Asia business unit (SEA) has raised USD 60 million (around Rs 510 crore) in a funding round led by Navis Capital Partners and Dragon Fund.
- LambdaTest raised \$38 million funding in a new round led by growth-stage venture capital firm Avataar Ventures to expand its artificial intelligence (AI) offerings to enterprise users.
- Travel Food Services filed draft papers with markets regulator Sebi to float a Rs 2,000 crore initial public offering (IPO).

## Regulatory

- Governor of the Reserve Bank of India (RBI) Sanjay Malhotra emphasized the need for the central bank to remain alert and agile while maintaining continuity and stability.
- SEBI plans a pan-India survey to boost capital market participation, enhance risk awareness, and address ecosystem gaps.
- The Telecom Regulatory Authority of India (Trai) is set to enforce its new message traceability norms from December 11.

## Economy and Government

- The Asian Development Bank lowered India's growth forecast for this fiscal to 6.5% from 7% it had projected earlier after the economy slowed down in the second quarter.
- Prime Minister Modi emphasized the importance of India's digital advancement for economic growth.
- Union Minister Jitendra Singh said India's atomic power capacity has almost doubled in the past decade from 4,780 megawatts to 8,081 megawatts and it would be tripled by 2031.

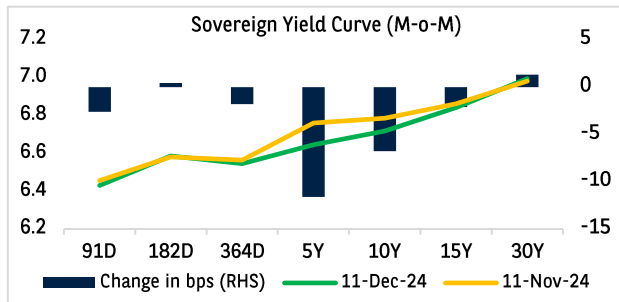
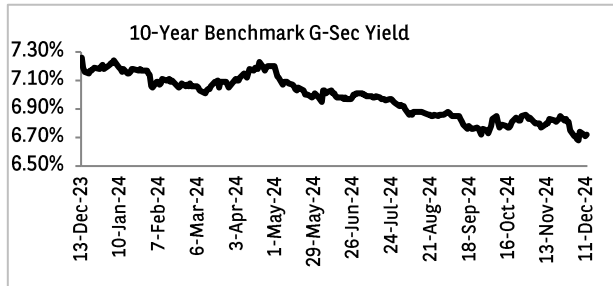
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	284,000	3,77,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.59	7.48	8.26	8.27	9.53	9.98
1-Yr	6.62	7.53	8.31	8.32	9.58	10.03
3-Yr	6.66	7.29	8.07	8.08	9.34	9.79
5-Yr	6.64	7.24	8.13	8.15	9.40	9.85
10-Yr	6.72	7.12	8.01	8.03	9.28	9.73

G-sec and corporate bonds data as of Dec 11

\* Weighted average yields; Source: CRISIL



## International

- US annual inflation rate rose for a 2nd consecutive month to 2.7% in November compared to 2.6% in October, while the core inflation stood at 3.3% in November, unchanged from October and September.

## Commodities

- Crude oil prices rose \$1.70 to \$70.29 a barrel on the NYMEX as EU imposed new sanctions over Russia, tightening global supply.
- OPEC chopped projections for consumption growth in 2024 by 210,000 barrels a day to 1.6 million barrels a day.

## Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Dec 11	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Dec 11	Dec 10
Monthly Inflation (CPI)	6.21% (Oct-24)	3.54% (Jul-24)	4.87% (Oct-23)	London Brent Crude Oil (\$/bbl)	73.52	72.19	70.61	76.03	USD	84.83	84.85
IIP	3.1% (Sep-24)	4.2% (Jun-24)	5.8% (Sep-23)	NYMEX Crude Oil (\$/bbl)	70.29	68.59	67.31	71.32	GBP	108.01	108.23
GDP	6.7% (Apr-Jun FY25)	7.8% (Jan-Mar FY24)	8.2% (Apr-Jun FY24)	Gold (Rs / 10 gm)#	77666	77175	71994	61452	Euro	89.09	89.37
GST Collection (in Rs cr)	187,346 (Oct-24)	182,075 (Jul-24)	172,003 (Oct-23)	# ibjarates spot prices				100 Yen	55.58	55.99	
				Source: Financial Websites, IBJA				Forex Reserve (\$ bn)*	658.09	656.58	
								Dollar Index	106.51	106.40	

Source: CRISIL, Mospi, Financial Websites

\*Data pertains to Nov 22 and to Nov 15 respectively

Source: RBI, Financial Websites

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