

Indian Indices	Dec 16	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81749	-0.47	-1.49	14.36	23.35
Nifty 50	24668	-0.40	-2.82	14.97	22.71
BSE Mid cap	48127	0.73	-2.28	32.95	41.26
Nifty Midcap	59443	0.77	-0.98	30.40	43.54
Nifty Smallcap	19531	0.64	0.13	31.21	43.54
BSE SmallCap	57228	0.47	-0.10	35.99	34.37

Source: BSE, NSE

Indian Indices	Dec 16	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53952	0.17	-7.47	31.19
BSE Bankex	60987	-0.02	3.03	12.24
BSE CD	67174	0.50	0.15	38.35
BSE CG	73345	0.38	0.39	34.60
BSE FMCG	20809	-0.26	-11.71	6.31
BSE Healthcare	44145	0.22	-0.50	45.13
BSE IT	45408	-0.61	3.40	24.83
BSE Metal	31439	-0.95	-2.04	21.64
BSE Oil & Gas	26878	-0.75	-12.59	20.32
BSE Power	7562	-0.17	-9.67	30.79
BSE Realty	8717	3.17	5.34	43.83

Source: BSE, NSE

Global Indices	Dec 16	1D % Chg	3M % Chg	1Y % Chg
DJIA	43717	-0.25	5.03	17.19
Nasdaq	20174	1.24	14.68	36.18
FTSE 100	8262	-0.46	-0.20	9.05
Nikkei 225	39457	-0.03	7.86	19.67
Hang Seng	19795	-0.88	13.62	17.89

Source: Financial websites

Rs. Cr (Equity)	FII Inv Dec 13	MF Inv Dec 12	DII Inv Dec 16
Buy	16588	10508	8637
Sell	13651	7863	8871
Net	2937	2646	-234
Net (YTD)	8587	402437	498239

Source: NSDL, NSE

Debt Market Indicators	Dec 16	1D Ago
Repo Rate	6.50%	6.50%
Call Rate	6.70%	6.80%
10 Yr Gilt^	6.74%	6.73%
91-day T-bill^	6.47%	6.45%
182-day T Bill^	6.61%	6.59%
364-day T Bill^	6.58%	6.56%
3-mth CP rate	7.45%	7.44%
6-mth CP rate	7.70%	7.70%
1-yr CP rate	7.85%	7.85%
3-mth CD rate	7.20%	7.20%
6-mth CD rate	7.45%	7.51%
12-mth CD rate	7.58%	7.58%
5 yr Corp Bond	7.24%	7.24%
Net LAF o/s (Rs Cr)*	-72385	-56525
M3 supply (Rs lakh Cr)**	264.48	262.90
G-sec Volume (Rs Cr)	21635	46765
SDF*	150019	134159
1 Year OIS	6.43%	6.40%
US 10-year Treasury Yield	4.39%	4.40%

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

** Nov 29 and Nov 15 respectively

Indian Equity

- Indian equities ended lower on Monday, dragged down by metal and IT stocks amid weak global commodity prices and caution ahead of the US Federal Reserve's interest rate decision.
- The top losers were Titan Company, Adani Ports, TCS, Hindalco and BPCL, down 1.24-2.01%.
- The top gainers were Dr Reddy's Labs, IndusInd Bank, HDFC Life, Bajaj Finance and Power Grid Corporation, up 0.34-1.89%.

Global Equity

- Wall Street stocks ended mixed on Monday with Nasdaq gaining driven by positive economic data while Dow Jones ended marginally lower ahead of the anticipated Federal Reserve Rate cut.
- FTSE index ended lower on Monday ahead of the Bank of England's rate cut decision.
- Strait Times Index closed slightly higher on Monday, buoyed by gains in bank shares.
- Nikkei Index closed marginally lower on Monday, owing to a fall in chip-related stocks, on investor caution ahead of the FOMC and BoJ policy meets due this week.
- Hang Seng Index closed lower on Monday, after data indicated slowdown in consumption growth and investment in properties.
- At 8.30 AM in the morning, Asian Markets were trading mixed.

Indian Debt

- The interbank call money rate closed lower on Monday at 6.70% compared to 6.80% on Friday.
- Government Bond prices ended lower on Monday following a rise in the US treasury yields, while the focus remained on Fed's monetary policy decision.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended higher at 6.74% on Monday compared to 6.73% on Friday.

Capital Market

- Aaradhya Disposal Industries, filed its Draft Red Herring Prospectus (DRHP) with NSE Emerge for an initial public offering (IPO).
- Sanathan Textiles fixed a price band of Rs 305-321 per share for its Rs 550-crore initial public offering (IPO).
- GK Energy Ltd filed preliminary papers with markets regulator Sebi to garner funds through an initial public offering (IPO).

Regulatory

- Sebi proposed using DigiLocker, a government digital storage system, to make it easier to manage and transfer financial assets when someone passes away.
- The Competition Commission of India (CCI) approved global investment firm KKR's proposal to acquire a stake in home-grown food-tech company Rebel Foods.
- The Telecom Regulatory Authority of India plans to launch an updated and more user-friendly 'do not disturb' (DND) app soon to provide mobile phone users some respite from spam.

Economy and Government

- India wholesale prices eased by 1.89% in November, compared to a 2.36% gain in October.
- India HSBC Manufacturing Flash PMI rose to 57.4 in December from a final 56.5 in November while Services Flash PMI edged up to 60.8 from 58.4 and composite flash PMI increased to 60.7 compared to a final 58.6.
- India's merchandise trade deficit in November widened to an all-time high of \$37.84 billion from \$27.1 billion in October.
- Union food minister Pralhad Joshi launched a Rs 1,000 crore credit guarantee scheme to help farmers easily access post-harvest loans by leveraging electronic warehouse receipts.
- The Maharashtra government tabled supplementary demands of Rs 33,788.40 crore, with a provision of Rs 1,400 crore for the Mukhyamantri Majhi Ladki Bahin scheme.

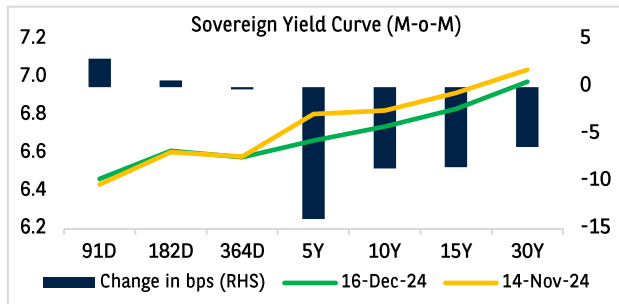
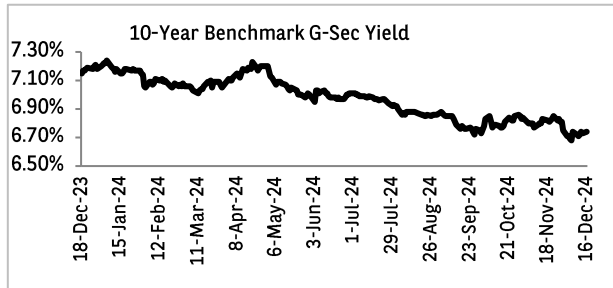
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	321,000	3,40,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.61	7.56	8.34	8.35	9.61	10.06
1-Yr	6.67	7.53	8.31	8.32	9.58	10.03
3-Yr	6.68	7.29	8.07	8.08	9.34	9.79
5-Yr	6.67	7.24	8.13	8.15	9.40	9.85
10-Yr	6.74	7.12	8.01	8.03	9.28	9.73

G-sec and corporate bonds data as of Dec 16

* Weighted average yields; Source: CRISIL



International

- US S&P Global Manufacturing PMI flash declined to 48.3 in December from 49.7 in November, while services PMI Flash rose to 58.5 from 56.1 and composite PMI Flash increased to 56.6 from 54.9.
- Eurozone HCOB Manufacturing Flash PMI was at 45.2 in December, unchanged from November, while HCOB Services Flash PMI rose to 51.4 from 49.5 and HCOB Composite Flash PMI increased to 49.50 in December from 48.30 in November.
- UK S&P Global Flash Manufacturing PMI fell to 47.3 in December compared to 48 in November while S&P Global Services Flash PMI rose to 51.4 compared to 50.8 and S&P Global Composite Flash PMI was at 50.5, unchanged from November.

Commodities

- Crude oil prices fell 58 cents to \$70.71 a barrel on the NYMEX due to weak consumer spending in China and investor caution ahead of the Fed's interest rate decision.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Dec 16	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Dec 16	Dec 13
Monthly Inflation (CPI)	5.48% (Nov-24)	3.65% (Aug-24)	5.55% (Nov-23)	London Brent Crude Oil (\$/bbl)	73.91	74.49	72.75	76.55	USD	84.87	84.79
IIP	3.5% (Oct-24)	4.8% (Jul-24)	11.9% (Oct-23)	NYMEX Crude Oil (\$/bbl)	70.71	71.29	70.09	71.43	GBP	107.39	107.18
GDP	5.4% (Jul-Sep FY25)	6.7% (Apr-Jun FY24)	8.1% (Jul-Sep FY24)	Gold (Rs / 10 gm)#	76908	76922	73489	62367	Euro	89.15	88.93
GST Collection (in Rs cr)	182,269 (Nov-24)	174,962 (Aug-24)	167,929 (Nov-23)	# ibjارات spot prices				Forex Reserve (\$ bn)*	654.86	658.09	
				Source: Financial Websites, IBJA				Dollar Index	106.78	107.00	

Source: CRISIL, Mospi, Financial Websites

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