

Indian Indices	Feb 24	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74454	-1.14	-5.89	1.79	20.73
Nifty 50	22553	-1.06	-5.66	1.53	20.05
BSE Mid cap	40058	-0.78	-11.04	0.31	31.76
Nifty Midcap	50013	-0.94	-9.09	1.49	33.92
Nifty Smallcap	15477	-1.02	-12.83	-4.31	26.52
BSE SmallCap	45254	-1.31	-13.99	-1.69	28.02

Source: BSE, NSE

Indian Indices	Feb 24	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	48239	0.22	-9.26	1.66
BSE Bankex	55431	-0.52	-4.93	4.20
BSE CD	54457	-0.15	-12.21	5.87
BSE CG	57758	-1.10	-14.33	1.81
BSE FMCG	18973	0.16	-8.69	-3.23
BSE Healthcare	39436	-0.47	-8.22	10.30
BSE IT	38729	-2.60	-9.61	0.26
BSE Metal	28567	-2.16	-5.46	4.27
BSE Oil & Gas	23638	-1.10	-8.11	-16.65
BSE Power	6020	-1.16	-17.44	-8.96
BSE Realty	6502	-0.91	-17.21	-10.38

Source: BSE, NSE

Global Indices	Feb 24	1D % Chg	3M % Chg	1Y % Chg
DJIA	43461	0.08	-1.89	11.06
Nasdaq	19287	-1.21	1.49	20.57
FTSE 100	8659	0.00	4.80	12.36
Nikkei 225	Closed	NA	NA	NA
Hang Seng	23342	-0.58	21.38	39.55

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 21	MF Inv Feb 20	DII Inv Feb 24
Buy	10971	10087	12552
Sell	14402	7461	7366
Net	-3431	2626	5186
Net (YTD)	-99817	83576	127108

Source: NSDL, NSE

Debt Market Indicators	Feb 24	1D Ago
Repo Rate	6.25%	6.25%
Call Rate	5.80%	6.25%
10 Yr Gilt^	6.70%	6.71%
91-day T-bill^	6.40%	6.41%
182-day T Bill^	6.53%	6.54%
364-day T Bill^	6.52%	6.54%
3-mth CP rate	7.73%	7.79%
6-mth CP rate	7.83%	7.83%
1-yr CP rate	7.82%	7.86%
3-mth CD rate	7.42%	7.44%
6-mth CD rate	7.57%	7.59%
12-mth CD rate	7.52%	7.57%
5 yr Corp Bond	7.26%	7.26%
Net LAF o/s (Rs Cr)*	-90573	-90436
M3 supply (Rs lakh Cr)**	268.81	266.31
G-sec Volume (Rs Cr)	28195	25190
SDF*	90573	90436
1 Year OIS	6.27%	6.30%
US 10-year Treasury Yield	4.40%	4.42%

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

** Feb 7 and Jan 24 respectively

Indian Equity

- Indian equity benchmarks ended lower on Monday, dragged down by financial and IT stocks amid escalating concerns over slowing growth in the United States.
- The top losers were Wipro, HCL Technologies, TCS, Infosys and Bharti Airtel, down 2.32-3.69%.
- The top gainers were Mahindra & Mahindra, Dr Reddys Labs, Eicher Motors, Hero Motocorp and Kotak Mahindra, up 0.67-1.49%.

Global Equity

- Wall Street stocks ended mixed on Monday, with the Dow edging up on sector-specific gains while the Nasdaq fell, weighed down by tech stocks as investors awaited Nvidia's earnings.
- FTSE index closed flat on Monday as investors awaited Bank of England's comments for interest rate clues.
- Singapore's Strait Times Index closed marginally lower on Monday due to stock-specific losses after the Monetary Authority of Singapore (MAS) unveiled measures to boost the stock market.
- Japan's Nikkei Index was closed on Monday.
- Hong Kong's Hang Seng Index ended lower on Monday due to the ongoing tariff conflict between the United States and China.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended lower at 5.80% on Monday compared to 6.25% on Friday.
- Government bond prices were little changed on Monday following RBI's longer-term liquidity infusion plan and after minutes of the latest MPC policy meeting indicated dovish stance.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.70% on Monday compared to 6.71% on Friday.

Capital Market

- Ireda received shareholder approval to raise up to Rs 5,000 cr through the issuance of equity shares to qualified institutional buyers.
- Tata Communications issued commercial papers to raise Rs 465 cr.
- Dipna Pharmachem received board's approval to raise funds up to Rs 100 crore via the issuance of convertible warrants.
- Geniemode raised over \$50 million in a Series C funding round to fuel its global expansion and to enhance its technology-driven supply chain solutions.
- Adani Power received approval from the committee of creditors for acquiring Vidarbha Industries Power Ltd (VIPL).

Regulatory

- The Reserve Bank of India (RBI) launched the tenth edition of Financial Literacy Week (FLW) 2025, with the theme "Financial Literacy: Women's Prosperity".

Economy and Government

- Prime Minister Narendra Modi said the World Bank has expressed confidence that India will continue to be the world's fastest growing economy in the coming years.
- Ministry of Commerce and Industry said India and the United Kingdom have resumed negotiations towards a trade deal between the two countries.
- Union Minister Nitin Gadkari announced that road projects worth Rs 3 lakh crore will be completed in Kerala during his tenure, including Rs 50,000 crore worth of upcoming projects.
- The Income Tax Department has introduced an online self-help tool to assist taxpayers in understanding the changes proposed in the Income Tax Bill 2025.

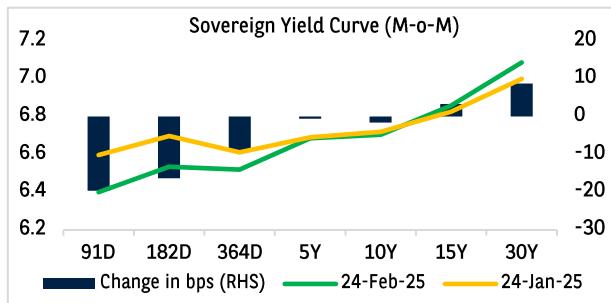
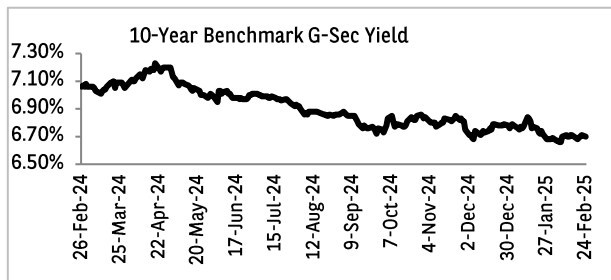
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	6,29,000	32,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.53	7.70	8.47	8.49	9.74	10.21
1-Yr	6.57	7.49	8.26	8.28	9.53	10.00
3-Yr	6.60	7.30	8.07	8.09	9.34	9.81
5-Yr	6.69	7.26	8.15	8.16	9.42	9.89
10-Yr	6.70	7.26	8.15	8.16	9.42	9.89

G-sec and corporate bonds data as of Feb 18

* Weighted average yields; Source: CRISIL



International

- US Chicago Fed National Activity Index fell to -0.03 in January 2025 compared to an upwardly revised 0.18 in December 2024.
- US Dallas Fed's Texas manufacturing activity index dropped 22 points to -8.3 in February from 14.1 in January.
- Eurozone annual inflation rose at 2.5% in January 2025 from 2.4% in December 2024 while annual core inflation rate remained unchanged at 2.7% for the fifth consecutive.
- Eurozone Consumer Price Index CPI decreased to 126.72 points in January from 127.07 points in December.

Commodities

- Crude oil prices rose 30 cents to \$70.70 a barrel on the NYMEX as new US sanctions on Iran and Iraq's output cuts fueled supply concerns.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Feb 24	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Feb 24	Feb 21
Monthly Inflation (CPI)	4.31% (Jan-25)	6.21% (Oct-24)	5.1% (Jan-24)	London Brent Crude Oil (\$/bbl)	74.78	74.43	75.17	81.62	USD	86.69	86.65
IIP	3.2% (Dec-24)	3.1% (Nov-24)	4.4% (Dec-23)	NYMEX Crude Oil (\$/bbl)	70.7	70.4	71.24	76.49	GBP	109.82	109.70
GDP	5.4% (Jul-Sep FY25)	6.7% (Apr-Jun FY24)	8.1% (Jul-Sep FY24)	Gold (Rs / 10 gm)#	86400	86092	77787	62008	Euro	91.11	90.91
GST Collection (in Rs cr)	195,506 (Jan-25)	187,346 (Oct-24)	172,129 (Jan-24)	# ibjirates spot prices				Forex Reserve (\$ bn)*	635.72	638.26	
Source: CRISIL, Mospi, Financial Websites				Source: Financial Websites, IBJA				*Data pertains to Feb 14 and to Feb 7 respectively Source: RBI, Financial Websites			

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