

Indian Indices	Feb 27	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74612	0.01	-7.01	2.08	20.77
Nifty 50	22545	-0.01	-7.13	1.56	20.04
BSE Mid cap	39446	-0.97	-14.17	-0.75	31.28
Nifty Midcap	49137	-1.14	-12.68	0.19	33.32
Nifty Smallcap	15157	-1.64	-18.09	-6.31	25.97
BSE SmallCap	44112	-2.09	-19.15	-3.87	27.17

Source: BSE, NSE

Indian Indices	Feb 27	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	47689	-1.57	-10.27	0.04
BSE Bankex	55389	-0.09	-7.02	4.72
BSE CD	54202	-0.83	-13.47	5.64
BSE CG	56493	-1.58	-19.68	-2.03
BSE FMCG	18869	-0.81	-11.01	-3.63
BSE Healthcare	39067	-0.72	-9.16	9.51
BSE IT	38260	-0.63	-12.33	-0.65
BSE Metal	28282	0.70	-7.20	4.19
BSE Oil & Gas	23179	-0.60	-12.66	-17.96
BSE Power	5898	-1.80	-20.85	-11.71
BSE Realty	6287	-2.06	-21.41	-14.32

Source: BSE, NSE

Global Indices	Feb 27	1D % Chg	3M % Chg	1Y % Chg
DJIA	43240	-0.45	-3.32	10.95
Nasdaq	18544	-2.78	-2.71	15.65
FTSE 100	8756	0.28	5.82	13.97
Nikkei 225	38256	0.30	0.32	-2.51
Hang Seng	23718	-0.29	20.99	41.26

Source: Financial websites

Rs. Cr (Equity)	FII Inv Feb 25	MF Inv Feb 24	DII Inv Feb 27
Buy	12714	10776	13530
Sell	15548	5093	11803
Net	-2834	5683	1727
Net (YTD)	-108370	91736	131866

Source: NSDL, NSE

Debt Market Indicators	Feb 27	1D Ago
Repo Rate	6.25%	6.25%
Call Rate	5.85%	5.90%
10 Yr Gilt^	6.71%	6.71%
91-day T-bill^	6.41%	6.38%
182-day T Bill^	6.57%	6.53%
364-day T Bill^	6.53%	6.51%
3-mth CP rate	7.76%	7.73%
6-mth CP rate	7.83%	7.83%
1-yr CP rate	7.80%	7.80%
3-mth CD rate	7.48%	7.45%
6-mth CD rate	7.61%	7.58%
12-mth CD rate	7.56%	7.55%
5 yr Corp Bond	7.29%	7.26%
Net LAF o/s (Rs Cr)*	-111994	-112841
M3 supply (Rs lakh Cr)**	268.81	266.31
G-sec Volume (Rs Cr)	29355	38215
SDF*	111994	112841
1 Year OIS	6.27%	6.26%
US 10-year Treasury Yield	4.29%	4.25%

*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 flat on Thursday as gains in financial shares following the Reserve Bank of India's decision to ease lending norms for microfinance firms and non-banking finance companies were offset by auto sector losses amid mixed global cues.
- The top gainers were Shriram Finance, Bajaj Finserv, Bajaj Finance, Sun Pharmaceuticals and Hindalco, up 2.02-5.67%.
- The top losers were UltraTech Cement, Trent, Bajaj Auto, Jio Financial and Tata Motors, down 1.97-4.71%.

Global Equity

- Wall Street stocks ended lower on Thursday, dragged down by disappointing earnings reports from Nvidia and softer-than-expected economic data.
- FTSE index closed higher on Thursday boosted by strong quarterly earnings from Rolls-Royce.
- Strait Times Index closed higher on Thursday on better corporate earnings.
- Nikkei Index closed higher on Thursday owing to buying at lower levels.
- Hang Seng Index closed lower on Thursday because of profit booking.
- At 8.30 AM in the morning, Asian Markets were trading lower.

Indian Debt

- The interbank call money rate ended lower at 5.85% on Thursday compared to 5.90% on Tuesday.
- Government bond prices were flat on Thursday ahead of the release of RBI weekly auction results, with focus on central bank's upcoming foreign exchange swap.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended flat at 6.71% on Thursday.

Capital Market

- Power Finance Corporation inked an initial pact to provide Rs 26,800 crore finance to power utilities of Madhya Pradesh.
- Akzo Nobel India received a binding offer from its parent company to acquire its powder coatings business and international research centre for a total of Rs 2,143 crore.
- Transrail Lighting secured new orders worth Rs 2,752 crore, primarily in the transmission and distribution business.
- Varanasi Aurangabad NH-2 Tollway Private Limited (VAH) raised \$316.3 million through a dollar-denominated bond issuance, marking its debut in the international bond market.

Regulatory

- The RBI has rolled back the excess 25% risk weights on the exposures of banks to non-banking financial companies (NBFCs) and Micro-Finance Institutions (MFIs) that were raised in November 2023.
- SEBI market regulator said it will allow asset managers with more than a three-year track record to offer a range of investment strategies under its newly created 'specialised investment fund' (SIF) category, aimed at wealthier investors.
- Sebi introduced a new regulatory framework for Specialized Investment Funds (SIFs) effective from April 1, 2025 which offers greater portfolio flexibility compared to mutual funds while bridging the gap with Portfolio Management Services (PMS).

Economy and Government

- House Price Index increased 3.1 % in the third quarter of 2024-25 as compared to 4.3% growth in the preceding three months and 3.8% growth in the year-ago period.
- Finance Minister Nirmala Sitharaman said India needs to ramp up its bilateral relations for trade and investment, as the world is witnessing a churn, and bilateralism seems to be the new catalyst tool.
- Union Mines Minister G Kishan Reddy urged state governments to refrain from imposing higher taxes on minerals, as it would increase the cost of steel and cement for consumers.

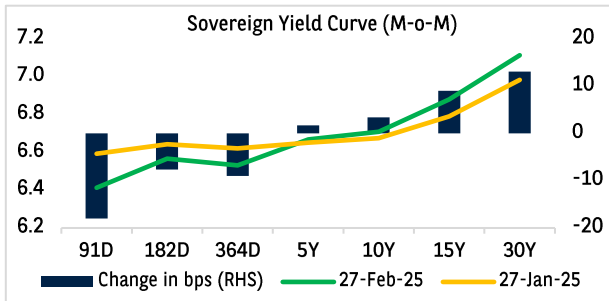
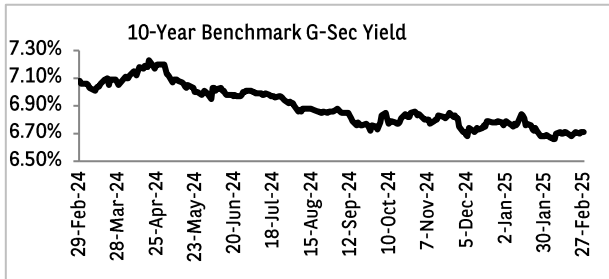
Borrowing (in Rs cr)	Total	Completed	Balance
FY 2025	6,61,000	6,29,000	32,000

Source: RBI

Yields (%)	G-sec*	AAA	AA+	AA	AA-	A+
6-mth	6.57	7.70	8.47	8.49	9.74	10.21
1-Yr	6.57	7.52	8.29	8.31	9.56	10.03
3-Yr	6.58	7.33	8.10	8.12	9.37	9.84
5-Yr	6.67	7.29	8.18	8.19	9.45	9.92
10-Yr	6.71	7.29	8.18	8.19	9.45	9.92

G-sec and corporate bonds data as of Feb 27

* Weighted average yields; Source: CRISIL



International

- US economy expanded an annualized 2.3% in Q4 2024 compared to 3.1% in Q3 2024.
- US personal consumption expenditure price index rose 2.4% in Q4 2024, compared to 1.5% Q3 2024.
- Eurozone Economic Sentiment Indicator increased to 96.3 in February 2025, the highest level in five months, compared to an upwardly revised 95.3 in January 2025.
- Eurozone consumer confidence indicator rose by 0.6 points to -13.6 in February 2025 compared to -14.2 in January 2025.
- Japan Retail sales rose by 3.9% on-year in January 2025, compared to a downwardly revised 3.5% growth in December 2024.
- Japan Industrial Production increased 2.60% in January 2025 compared to a 1.1% decline in December 2024.

Commodities

- Crude oil prices rose \$1.73 to \$70.35 a barrel on the NYMEX as supply fears grew after US President revoked Chevron's Venezuela license.

Economic Indicators

YoY (%)	Current	Quarter Ago	Year Ago	Commodity Prices	Feb 27	1D Ago	3M Ago	1Y Ago	Currencies Vs INR	Feb 27	Feb 25
Monthly Inflation (CPI)	4.31% (Jan-25)	6.21% (Oct-24)	5.1% (Jan-24)	London Brent Crude Oil (\$/bbl)	74.04	72.53	72.83	83.65	USD	87.21	87.00
IIP	3.2% (Dec-24)	3.1% (Nov-24)	4.4% (Dec-23)	NYMEX Crude Oil (\$/bbl)	70.35	68.62	68.72	78.87	GBP	110.41	109.93
GDP	5.4% (Jul-Sep FY25)	6.7% (Apr-Jun FY24)	8.1% (Jul-Sep FY24)	Gold (Rs / 10 gm)#	85593	86647	76175	62271	Euro	91.31	91.16
GST Collection (in Rs cr)	195,506 (Jan-25)	187,346 (Oct-24)	172,129 (Jan-24)	# ibjirates spot prices				100 Yen	58.39	58.09	
				Source: Financial Websites, IBIA				Forex Reserve (\$ bn)*	635.72	638.26	
								Dollar Index	107.28	106.42	

Source: CRISIL, Mospi, Financial Websites

*Data pertains to Feb 14 and to Feb 7 respectively
Source: RBI, Financial Websites

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