

Broad Indices	Nov 8	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	79486	-0.07	0.76	22.33	22.77
Nifty 50	24148	-0.21	0.13	24.20	22.27
BSE Mid cap	46080	-1.18	-1.17	42.04	39.73
Nifty Midcap 100	56352	-1.33	-0.58	39.32	42.20

Sectoral Indices	Nov 8	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54041	0.14	-4.16	46.39
BSE Bankex	58858	-0.65	3.20	19.14
BSE CD	61649	0.70	6.51	35.73
BSE CG	69479	-0.90	-2.89	46.42
BSE FMCG	21409	0.08	-4.70	12.87
BSE Healthcare	44051	-0.11	7.64	53.78
BSE IT	41976	0.54	7.02	33.00
BSE Metal	30983	-1.05	0.70	35.65
BSE Oil & Gas	27324	-2.08	-13.34	41.18
BSE Power	7703	-1.51	-5.82	69.90
BSE Realty	7554	-2.98	-3.92	46.00

Nifty			
Top Out performers	% Change	Top Under performers	% Change
M&M	2.89	Trent	-3.18
Titan Company	2.10	Coal India	-2.60
Tech Mahindra	1.84	Asian Paints	-2.58
Infosys	1.49	Tata Steel	-2.24
Nestle	1.45	Shriram Finance	-2.03

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Nov 7	MF Inv Nov 6	DII Inv Nov 8
Buy	11632	12319	11247
Sell	17268	8381	9499
Net	-5635	3938	1748
Net (YTD)	-15497	367794	463331

Policy rates	Nov 8	1W Ago	M Ago	3M Ago
Repo (%)	6.50	6.50	6.50	6.50
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.50	4.50	4.50	4.50

Overnight rates	Nov 8	1W Ago	M Ago	3M Ago
Call (%)	6.55	5.75	6.40	6.75
10 Yr Gilt(%)^	6.77	6.84	6.81	6.88
TREP (%)	6.75	6.27	6.23	6.88

Short-term debt	Nov 8	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.48	7.50	7.55	7.63
6-month CPs (%)	7.75	7.75	7.75	7.83
3-month CDs (%)	7.16	7.17	7.10	7.16
6-month CDs (%)	7.38	7.40	7.44	7.43
182-day T-bill (%)^	6.58	6.62	6.52	6.71
364-day T-bill (%)^	6.55	6.60	6.55	6.71

Long-term debt	Nov 8	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.71	6.74	6.68	6.78
5-Y G-sec (%)	6.75	6.77	6.73	6.79
10-Y G-sec (%)	6.77	6.84	6.81	6.88

^Weighted average yield

Indian Equity

- Indian equities ended lower on Friday, led by realty and oil and gas stocks after the 25-basis point rate cut by the US Federal Reserve (Fed) to ease pressure on the US economy.
- The top losers were Trent, Coal India, Asian Paints, Tata Steel and Shriram Finance, down 2.03-3.18%.
- The top gainers were Mahindra & Mahindra, Titan Company, Tech Mahindra, Infosys and Nestle, up 1.45-2.89%.

Indian Debt

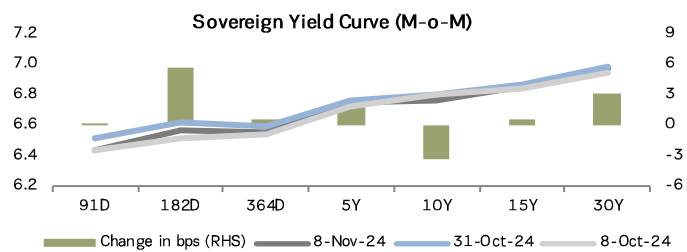
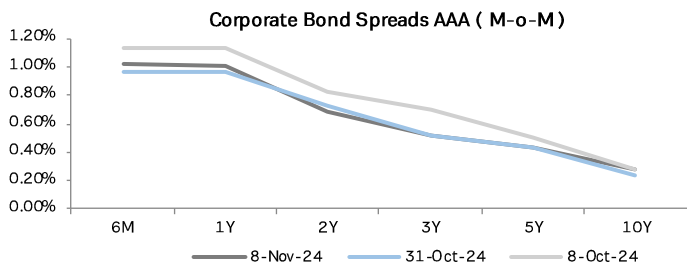
- The interbank call money rate closed higher at 6.55% on Friday compared to 5.75% on Thursday.
- Government bond marginally higher on Friday due to fall in the US treasury yield after the US Federal Reserve decided to trim the key policy rate by 25bps.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed marginally lower at 6.81% on Friday compared to 6.82% on Thursday.
- Meanwhile, the new 10-year benchmark 06.79% GS 2034 paper closed at 6.78% on Friday.

Economy and Government

- India Foreign exchange reserves fell to \$682.1 billion as of November 1st, since the record high of \$704.9 billion in the last week of September.
- Prime Minister Narendra Modi is scheduled to visit Bihar on November 13 to lay the foundation stone for AIIMS Darbhanga.
- The Employees' Provident Fund Organisation witnessed a 7.6% jump in number of contributing members in 2023-24 at 73.7 mn compared to 68.5 mn in the preceding years.
- Government generated Rs 2,364 cr in revenue over three years by selling scrap from government offices.
- The government raised Rs 3,449 crore by selling a 1.6% stake in Hindustan Zinc Ltd (HZL) through a two-day offer-for-sale.
- The Centre procured 120.67 lakh tonnes of paddy so far from Punjab, or 65 per cent of the estimated target.
- The government plans to integrate the e-Shram portal database of over 300 million unorganised workers with the Gati Shakti portal to improve logistics planning and increase employment opportunities for the locals.
- Finance Minister Nirmala Sitharaman urged regional rural banks in South India to boost lending under government schemes like Mudra and PM Vishwakarma.
- Union Finance Minister Nirmala Sitharaman said that the Rs 100 crore credit guarantee scheme for MSMEs which was announced in the budget this year will soon be placed before the Union Cabinet for approval.
- Ministry of External Affairs (MEA) Secretary (East) Jaideep Mazumder and Bimstec (Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation) Secretary General Indramani Pandey signed an agreement to establish the Bimstec Energy Centre in Karnataka's Bengaluru.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.70	7.57	8.31	8.36	9.65
3-Yr	6.71	7.35	8.09	8.14	9.43
5-Yr	6.75	7.30	8.15	8.20	9.49
10-Yr	6.77	7.17	8.02	8.07	9.36

* Weighted average yields



Global Indices	Nov 8	1D % Chg	3M % Chg	1Y % Chg
DJIA	43989	0.59	11.52	28.95
Nasdaq	19287	0.09	15.77	41.29
FTSE 100	8072	-0.84	-0.89	9.06
DAX	19215	-0.76	8.68	26.17
Nikkei 225	39500	0.30	13.41	22.80
Hang Seng	20728	-1.07	22.71	17.99
KOSPI	2561	-0.14	0.17	5.76

Global 10 yr Sov. Yields (%)	Nov 8	1D Ago	3M Ago	1Y Ago
US	4.3	4.31	3.99	4.52
UK	4.43	4.50	3.98	4.28
German	2.36	2.44	2.27	2.61
Japan	0.99	0.99	0.87	0.83

Commodity Prices	Nov 8	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	73.87	75.63	79.16	79.54
NYMEX Crude Oil (\$/bbl)	70.35	72.36	76.19	75.33
Gold (Rs / 10 gm)#	77382	76780	69205	60540

ibjarates spot prices

Currencies Vs INR	Nov 8	1D Ago	M Ago	3M Ago
USD	84.37	84.37	83.96	83.96
GBP	109.35	108.91	109.96	106.40
Euro	90.95	90.68	92.30	91.75
100 Yen	55.40	54.80	56.80	57.47
Forex Reserve (\$ bn)*	682.13	684.81	704.89	667.39

* Data pertains to Oct 25 and to Oct 18 respectively Source: CRISIL

Key Macro Indicators	
CPI	5.49% (September-2024)
WPI	1.84% (September -2024)
IIP	-0.1% (August -2024)
GDP Growth Rate	6.7% (April-June FY25)

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Capital Market

- Paramesu Biotech Ltd filed preliminary papers with SEBI to raise Rs 600 crore through an IPO.
- Ecozen plans to raise \$75 million to fuel its expansion plan in the domestic and international markets.

Global Equity

- Wall Street ended higher on Friday driven by optimism over potential business-friendly policies with a Republican-controlled congress.
- 10-year US bond yield ended higher at 3.65% following Federal reserve interest rate decision.
- FTSE index ended lower on Friday pressured by Vistry's profit warning and weak stimulus news from Shanghai affecting China-linked stocks.
- Asian markets were trading lower at 8.30 AM.

International

- US Michigan Consumer Sentiment increased to 73 in November, the highest in seven months, compared to 70.5 in October.
- US Michigan Consumer Expectations increased to 78.5 points in November, from 74.1 in October.
- China's annual inflation rate stood at 0.3% in October, compared with September's figure of 0.4%.
- China's producer prices fell by 2.9% on-year in October, following a 2.8% drop in the previous month.
- Japan coincident economic indicators increased to 115.7 in September from 114.0 in August while leading economic indicators index increased to 109.4 in from 106.9.
- Japan loan growth remain unchanged at 2.7% in October.

Upcoming market indicators

- UK Unemployment Rate, September (November 11)
- India Industrial Production YoY, September ((November 11)
- India Inflation Rate YoY, October (November 11)
- India Manufacturing Production YoY, September (November 11)
- US Inflation Rate YoY, October (November 12)
- US Core Inflation Rate YoY, October (November 12)
- Japan PPI YoY, October, (November 12)
- Eurozone GDP Growth Rate YoY 2nd Est, Q3 (November 13)
- Eurozone Industrial Production YoY, September (November 13)
- US PPI YoY, October (November 13)
- US Core PPI YoY, October (November 13)
- UK GDP Growth Rate YoY Prel, Q3 (November 13)
- UK Balance of Trade, September (November 13)
- UK GDP YoY, September (November 13)
- UK Industrial Production YoY, September (November 13)
- UK Manufacturing Production YoY, September (November 13)
- India WPI Inflation YoY, October (November 13)