

Broad Indices	Dec 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81766	1.00	-0.53	17.99	23.35
Nifty 50	24708	0.98	-1.74	18.48	22.74
BSE Mid cap	47501	0.27	-3.45	35.52	40.73
Nifty Midcap 100	58442	0.57	-1.69	32.45	42.80

Sectoral Indices	Dec 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53670	0.59	-8.13	32.35
BSE Bankex	60942	0.68	4.32	14.60
BSE CD	64929	0.66	0.83	35.28
BSE CG	72613	0.53	0.33	38.40
BSE FMCG	21102	0.47	-9.30	7.83
BSE Healthcare	44544	0.25	2.18	45.81
BSE IT	44555	1.81	2.90	34.10
BSE Metal	31321	0.55	-0.64	26.60
BSE Oil & Gas	27274	0.53	-15.86	25.01
BSE Power	7613	0.20	-5.99	39.41
BSE Realty	8391	-0.30	3.12	44.39

Nifty			
Top Out performers	% Change	Top Under performers	% Change
TCS	2.52	SBI Life Insura	-1.43
Infosys	2.41	Bajaj Auto	-1.19
Titan Company	2.28	HDFC Life	-1.09
Trent	2.14	NTPC	-0.97
Dr Reddys Labs	2.00	Grasim	-0.39

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Dec 4	MF Inv Dec 3	DII Inv Dec 5
Buy	20801	11376	13396
Sell	17937	11788	15699
Net	2864	-412	-2304
Net (YTD)	-2151	399812	493935

Policy rates	Dec 5	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	Dec 5	1W Ago	M Ago	3M Ago
Call (%)	6.70	6.70	5.95	6.24
10 Yr Gilt(%)^	6.68	6.81	6.80	6.85
TREP (%)	6.55	6.48	6.25	6.37

Short-term debt	Dec 5	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.48	7.52	7.55	7.64
6-month CPs (%)	7.65	7.72	7.80	7.88
3-month CDs (%)	7.16	7.17	7.14	7.25
6-month CDs (%)	7.38	7.43	7.38	7.49
182-day T-bill (%)^	6.51	6.64	6.58	6.71
364-day T-bill (%)^	6.53	6.63	6.56	6.72

Long-term debt	Dec 5	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.62	6.73	6.73	6.74
5-Y G-sec (%)	6.61	6.77	6.76	6.76
10-Y G-sec (%)	6.68	6.81	6.80	6.85

^Weighted average yield

## Indian Equity

- Indian equities ended higher on Thursday as investors waited for the Reserve Bank of India's (RBI) policy decision amid positive global cues.
- The top gainers were TCS, Infosys, Titan Company, Trent and Dr Reddy's Laboratories, up 2.00-2.52%.
- The top losers were SBI Life Insurance, Bajaj Auto, HDFC Life, NTPC and Grasim, down 0.39-1.43%.

## Indian Debt

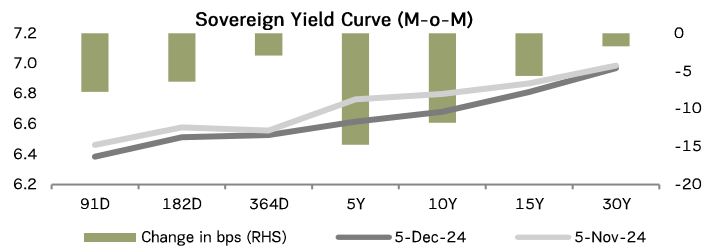
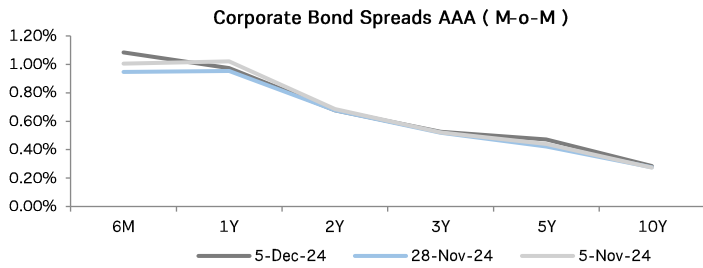
- The interbank call money rate closed higher at 6.70% on Thursday compared to 6.40% on Wednesday.
- Government bond prices closed flat on Thursday as investors remained on the edges ahead of RBI policy meet outcome due tomorrow.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended flat at 6.68% on Thursday.

## Economy and Government

- The Economic Survey 2024-25 will emphasize deregulation as a key strategy to boost job creation and enhance female workforce participation.
- Commerce and Industry Minister Piyush Goyal announced that the government is open to exploring alternative financing models to support micro, small, and medium enterprises (MSMEs) and may allocate specific areas for them in industrial townships.
- The National Highways Authority of India to issue Rs 1000 crore green bonds in the second week of December to raise funds for the implementation of environment friendly measures on the Delhi-Mumbai Expressway (DEM) project.
- Finance Minister Nirmala Sitharaman to start pre-Budget consultations with various stakeholders beginning Friday as part of Budget making exercise.
- The Centre has allowed state governments to include non-mineralised areas in the existing mining leases for dumping mine waste and overburden, a move aimed at streamlining mining operations and addressing industry challenges.
- Food and Consumer Affairs Minister Pralhad Joshi launched 'Anna Chakra', a groundbreaking supply chain optimization tool for the Public Distribution System (PDS).
- SEBI cautioned investors against using unregistered online platforms offering unlisted debt securities.
- SEBI proposed a framework to convert 'in the money' (ITM) single stock option contracts into futures a day before expiry.
- SEBI is considering introducing separate call auction session (CAS) after-market hours to determine the closing price of stocks in the equity cash market—on the lines of mechanisms followed globally.
- SEBI introduced an online document repository platform to facilitate efficient maintenance of records and documents by merchant (investment) bankers.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.64	7.49	8.27	8.28	9.54
3-Yr	6.62	7.25	8.03	8.04	9.30
5-Yr	6.61	7.20	8.09	8.11	9.36
10-Yr	6.68	7.08	7.97	7.99	9.24

\* Weighted average yields



Global Indices	Dec 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	44766	-0.55	9.84	23.92
Nasdaq	19701	-0.17	15.02	38.45
FTSE 100	8349	0.16	1.31	11.48
DAX	20359	0.63	9.59	23.14
Nikkei 225	39396	0.30	7.47	20.20
Hang Seng	19560	-0.92	12.13	19.80
KOSPI	2442	-0.90	-5.19	-2.10

Global 10 yr Sov. Yields (%)	Dec 5	1D Ago	3M Ago	1Y Ago
US	4.17	4.19	3.73	4.17
UK	4.28	4.25	3.92	4.05
German	2.10	2.05	2.21	2.38
Japan	1.06	1.05	0.88	0.63

Commodity Prices	Dec 5	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	72.09	72.31	72.69	77.2
NYMEX Crude Oil (\$/bbl)	68.3	68.54	69.15	72.32
Gold (Rs / 10 gm)#	76453	76392	71875	62287

# ibjarates spot prices

Currencies Vs INR	Dec 5	1D Ago	M Ago	3M Ago
USD	84.73	84.74	84.10	83.98
GBP	107.87	107.42	109.20	110.52
Euro	89.28	88.99	91.62	93.18
100 Yen	56.51	56.23	55.26	58.49
Forex Reserve (\$ bn)*	656.58	657.89	684.81	681.69

\* Data pertains to Nov 15 and to Nov 8 respectively Source: CRISIL

Key Macro Indicators	
CPI	6.21% (October-2024)
WPI	2.36% (October -2024)
IIP	3.1% (September -2024)
GDP Growth Rate	5.4% (Jul-Sep FY25)

Disclaimer: SAV has taken due care and caution in preparing this Report based on the information obtained from sources which it considers reliable (Data). However, SAV does not guarantee the accuracy, adequacy or completeness of the Data / Report and is not responsible for any errors or omissions or for the results obtained from the use of Data / Report. This Report is not a recommendation to invest / disinvest in any entity covered in the Report and no part of this report should be construed as an investment advice. SAV especially states that it has no financial liability whatsoever to the subscribers/ users/ transmitters/ distributors of this Report. No part of this Report may be published / reproduced in any form without SAV's prior written approval.

SAV brand is owned by La Crème De La Crème Services LLP

## Capital Market

- Star Agriwarehousing and Collateral Management Ltd filed preliminary papers with capital markets regulator Sebi to raise funds through an IPO.
- Axis Mutual Fund launched a new product that offers investors an opportunity in high-quality debt securities of nonbanking financial companies (NBFC) and housing finance companies (HFC).
- Vishal Mega Mart plans to launch its Rs 8,000 crore initial share-sale on December 11 for public subscription.
- Canara Bank received approval from the RBI to divest its shareholding in Canara Robeco Asset Management Company Ltd and Canara HSBC Life Insurance Company by 13% and 14.5% respectively through IPO.

## Global Equity

- Wall Street stocks ended lower on Thursday as investors awaited upcoming jobs data.
- US 10-year treasury yield declined 4.17% due to weak jobs data.
- FTSE index closed flat on Thursday as gains in personal goods stocks were offset by losses in the real estate sector.
- Asian markets were trading lower at 8.30 AM.

## International

- US trade deficit narrowed to \$73.8 billion in October from an upwardly revised \$83.8 billion in September.
- US initial jobless claims rose to 224,000 for the week ending November 30, from 213,000 in the previous week.
- Eurozone HCOB Construction PMI edged down to 42.7 in November compared to 43 in October.
- Eurozone Retail Sales increased 1.9% in October, following an upwardly revised 3% rise in September.
- UK S&P Global Construction PMI rose to 55.2 in November, up from 54.3 in October.
- Japan's household spending fell by 1.3% on-year in October, compared to a 1.1% decline in September.

## Upcoming market indicators

- US Non Farm Payrolls, November (December 6)
- Euro Area GDP Growth Rate, 3rd Est Q3 (December 6)
- India RBI Interest Rate Decision (December 6)