

Broad Indices	Jan 14	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76500	0.22	-6.68	5.42	22.15
Nifty 50	23176	0.39	-7.77	5.85	21.34
BSE Mid cap	43298	2.13	-10.86	14.32	37.31
Nifty Midcap 100	53677	2.45	-8.21	12.97	40.25

Sectoral Indices	Jan 14	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	51534	2.07	-13.84	21.09
BSE Bankex	55284	1.22	-6.09	2.76
BSE CD	60366	0.82	-8.62	17.63
BSE CG	62952	1.65	-12.64	11.58
BSE FMCG	20245	-1.01	-10.87	-0.63
BSE Healthcare	43009	1.05	-3.63	31.78
BSE IT	42787	-1.70	-1.09	15.26
BSE Metal	27747	3.51	-17.42	4.93
BSE Oil & Gas	25625	2.03	-14.98	5.78
BSE Power	6425	4.50	-23.69	5.62
BSE Realty	7148	0.82	-13.37	2.60

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Adani Enterpris	6.98	HCL Tech	-8.84
Hindalco	4.82	HUL	-3.39
Adani Ports	4.73	Apollo Hospital	-1.94
Shriram Finance	4.41	Titan Company	-1.78
NTPC	4.09	TCS	-1.35

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Jan 13	MF Inv Jan 10	DII Inv Jan 14
Buy	12074	12546	17837
Sell	16351	8373	9935
Net	-4276	4173	7901
Net (YTD)	-29560	15664	40183

Policy rates	Jan 14	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 (%)	4.00	4.00	4.50	4.50
Overnight rates	Jan 14	1W Ago	M Ago	3M Ago
Call (%)	6.50	6.25	6.80	5.75
10 Yr Gilt(%)^	6.83	6.75	6.73	6.78
TREP (%)	6.25	6.70	6.80	6.26
Short-term debt	Jan 14	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.90	7.73	7.44	7.43
6-month CPs (%)	7.98	7.80	7.70	7.70
3-month CDs (%)	7.53	7.45	7.20	7.10
6-month CDs (%)	7.65	7.58	7.51	7.40
182-day T-bill (%)^	6.65	6.61	6.59	6.53
364-day T-bill (%)^	6.69	6.64	6.56	6.50
Long-term debt	Jan 14	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.79	6.67	6.68	6.64
5-Y G-sec (%)	6.83	6.73	6.66	6.69
10-Y G-sec (%)	6.83	6.75	6.73	6.78

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed marginally higher on Tuesday after government data showed retail inflation eased in December.
- The top gainers were Adani Enterprises, Hindalco, Adani Ports, Shriram Finance and NTPC, up 4.09-6.98%.
- The top losers were HCLTech, HUL, Apollo Hospitals, Titan Company and TCS, down 1.35-8.84%.

Indian Debt

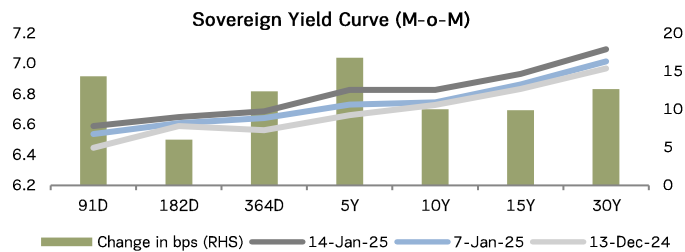
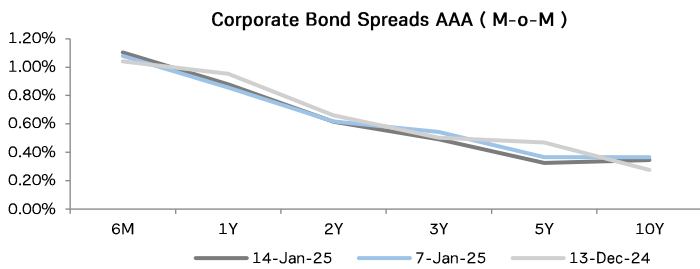
- The interbank call money rate ended higher at 6.50% on Tuesday compared to 5.90% on Monday.
- Government bond prices rose on Tuesday due to short covering at a lower level.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.82% on Tuesday compared to 6.85% on Monday.

Economy and Government

- India's wholesale prices increased by 2.37% in December, accelerating from a 1.89% rise in November.
- The Ministry of New and Renewable Energy introduced guidelines for implementing Payment Security Mechanism and Central Financial Assistance for rooftop solar installations under PM-Surya Ghar: Muft Bijli Yojana.
- The Ministry of Home Affairs (MHA) approved the creation of two new battalions for the Central Industrial Security Force (CISF), giving a major boost to India's security infrastructure.
- The labour ministry has asked states to extend social security benefits to ensure 100 per cent coverage like health, insurance, accidental benefits for all workers, besides leveraging technology to enhance the functioning of welfare boards.
- Rajnath Singh announces doorstep medical delivery for ex-servicemen.
- Sebi proposed mandating listed companies to issue securities only in demat form following stock split, consolidation of face value of shares, and merger or demerger.
- IRDAI updated the regulatory sandbox framework to stimulate innovation, improve efficiency, and ease of business.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.70	7.56	8.34	8.35	9.61
3-Yr	6.79	7.40	8.18	8.19	9.45
5-Yr	6.83	7.29	8.18	8.20	9.45
10-Yr	6.83	7.30	8.19	8.21	9.46

* Weighted average yields



Global Indices	Jan 14	1D % Chg	3M % Chg	1Y % Chg
DJIA	42518	0.52	-1.27	13.10
Nasdaq	19044	-0.23	2.93	27.19
FTSE 100	8202	-0.28	-1.10	7.56
DAX	20271	0.69	3.91	21.35
Nikkei 225	38474	-1.83	-2.86	8.14
Hang Seng	19220	1.83	-8.88	18.32
KOSPI	2497	0.31	-4.80	-1.10

Global 10 yr Sov. Yields (%)	Jan 14	1D Ago	3M Ago	1Y Ago
US	4.78	4.79	4.10	3.94
UK	4.88	4.89	4.24	3.80
German	2.62	2.59	2.28	2.14
Japan	1.24	1.24	0.95	0.58

Commodity Prices	Jan 14	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	79.92	81.01	77.46	78.29
NYMEX Crude Oil (\$/bbl)	77.50	78.82	73.83	72.68
Gold (Rs / 10 gm)#	78028	78308	76001	62515

ibjarates spot prices

Currencies Vs INR	Jan 14	1D Ago	M Ago	3M Ago
USD	86.55	86.44	84.79	84.05
GBP	105.65	105.05	107.18	109.73
Euro	88.70	88.36	88.93	91.87
100 Yen	54.90	54.88	55.26	56.26
Forex Reserve (\$ bn)*	634.59	640.28	654.86	701.18

* Data pertains to Jan 3 and to Dec 27 respectively Source: CRISIL

Key Macro Indicators	
CPI	5.22% (December-2024)
WPI	2.37% (December -2024)
IIP	5.2% (October -2024)
GDP Growth Rate	5.4% (Jul-Sep FY25)

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Capital Market

- IRFC emerged as the lowest bidder (L1) to finance Rs 3167 crore for the development of the Banhardih coal block in Latehar District, Jharkhand.
- Premier Energies received and accepted multiple orders aggregating to Rs 1,460 crore from two large independent power producers (IPP) and others.
- AIG Hospitals plans to invest Rs 800 crore in a new dedicated oncology centre in Hyderabad, featuring the cutting-edge Proton Beam Therapy system from Belgium-based IBA.
- Tata Group has partnered with the Indian Institute of Science (IISc) to establish Tata IISc Medical School at the institute's Bengaluru campus and will make a contribution of Rs 500 crore for support.
- EET Fuel, the trading name of Essar Oil (UK) Ltd, on Tuesday announced securing \$ 350 million finance as investors reposed confidence in its decarbonisation strategy and market positioning.
- Vedanta Resources plans to raise \$1-billion in dual tranche bonds.
- Tata Capital has raised \$400 million by selling dollar bonds maturing in three-and-a-half years to investors in Asia and Europe.

Global Equity

- Wall Street stocks ended mixed on Tuesday as Dow Jones gained after a smaller than expected rise in the producer price index while Nasdaq declined as investors were cautious about inflation data and earnings reports.
- 10-year US bond yield ended lower at 4.78% as investors remained cautious ahead of inflation data.
- FTSE index ended lower on Tuesday as investors awaited key inflation data.
- Asian markets were trading higher at 8.30 AM.

International

- US Producer Prices Index increased 3.3 % in December compared to 3% in November.
- Japan Economy Watchers Survey rose to 49.9 in December, up from 49.4 in November while Economy Watchers Survey Outlook decreased to 48.80 from 49.40.

Upcoming market indicators

- US NY Empire State Manufacturing Index, January (January 15)
- Eurozone Industrial Production, November (January 15)
- UK Inflation Rate, December (January 15)
- UK PPI Input/Output, December (January 15)
- UK Retail Price Index, December (January 15)
- India Balance of Trade, December (January 15)
- India Exports/ Imports, December (January 15)
- US Export/Import Prices, December (January 16)
- US Retail Sales, December (January 16)
- Eurozone Balance of Trade, November (January 16)
- UK GDP, November (January 16)
- UK Balance of Trade, November (January 16)
- UK Industrial/ Manufacturing Production, November (January 16)
- Japan PPI, December (January 16)