

Broad Indices	Apr 1	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	76025	-1.80	-3.16	2.72	21.19
Nifty 50	23166	-1.50	-2.43	3.13	21.05
BSE Mid cap	41100	-1.04	-11.94	2.83	33.26
Nifty Midcap 100	51230	-0.86	-10.83	4.74	32.21

Sectoral Indices	Apr 1	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	47568	-0.29	-9.05	-2.96
BSE Bankex	58650	-1.50	1.27	8.82
BSE CD	53019	-2.51	-18.03	1.47
BSE CG	61803	-1.47	-9.91	-0.31
BSE FMCG	19302	-0.75	-7.46	-0.28
BSE Healthcare	40835	-1.42	-10.19	15.11
BSE IT	35315	-2.24	-18.36	-1.38
BSE Metal	30549	-0.89	5.86	4.80
BSE Oil & Gas	25290	0.62	-3.13	-9.01
BSE Power	6504	-1.28	-7.50	-4.90
BSE Realty	6400	-3.05	-21.38	-13.58

Nifty			
Top Out performers	% Change	Top Under performers	% Change
IndusInd Bank	5.06	HCL Tech	-3.90
Trent	4.72	Bajaj Finserv	-3.50
Bajaj Auto	1.45	HDFC Bank	-3.30
Jio Financial	1.28	Bharat Electronics	-3.09
Hero Motocorp	1.05	Shriram Finance	-2.83

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Mar 27	MF Inv Mar 27	DII Inv Apr 1
Buy	28676	44443	12700
Sell	20555	47012	8377
Net	8121	-2568	4323
Net (YTD)	-111223	111470	186083

Policy rates	Mar 28	1W Ago	M Ago	3M Ago
Repo (%)	6.25	6.25	6.25	6.50
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.00	4.00	4.00	4.25
Overnight rates	Mar 28	1W Ago	M Ago	3M Ago
Call (%)	7.00	5.80	6.50	6.80
10 Yr Gilt(%)^	6.58	6.63	6.72	6.79
TREP (%)	5.70	6.60	6.80	7.07
Short-term debt	Mar 28	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.25	7.87	7.73	7.65
6-month CPs (%)	7.55	7.85	7.83	7.75
3-month CDs (%)	7.00	7.53	7.48	7.41
6-month CDs (%)	7.25	7.52	7.61	7.58
182-day T-bill (%)^	6.47	6.54	6.54	6.67
364-day T-bill (%)^	6.40	6.47	6.53	6.67
Long-term debt	Mar 28	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.44	6.49	6.59	6.73
5-Y G-sec (%)	6.45	6.50	6.68	6.75
10-Y G-sec (%)	6.58	6.63	6.72	6.79

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended lower on Tuesday owing to weakness in IT and banking stocks, as investor sentiment remained cautious over the US President's reciprocal tariffs that become effective Tuesday.
- Top losers were HCL Technologies, Bajaj Finserv, HDFC Bank, Bharat Electronics and Shriram Finance, down 2.83-3.90%.
- Top gainers were IndusInd Bank, Trent, Bajaj Auto, Jio Financial and Hero MotoCorp, up 1.05-5.06%.

Indian Debt

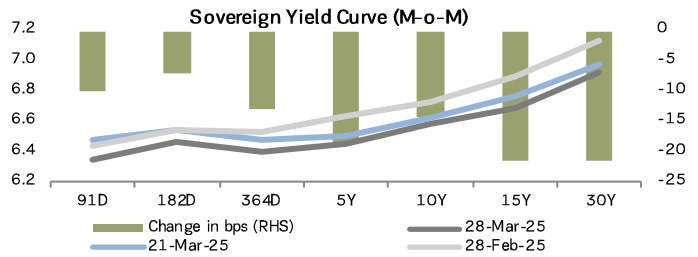
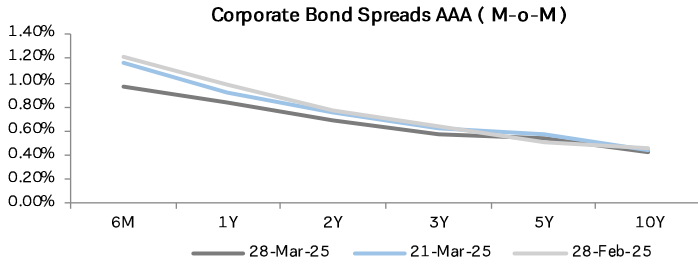
- The interbank call money rate ended higher at 7.00% on Friday compared to 6.35% on Thursday.
- Government bond prices rose on Friday as aggressive liquidity infusion boosted hopes for RBI rate cut.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.58% on Friday compared to 6.60% on Thursday.

Economy and Government

- According to the government data, gross GST collection in March grew 9.9% to over Rs 1.96 lakh crore.
- Global credit rating agency Moody's said that India's growth, despite slowing to 6.5% in FY26 from 6.7% in FY25, will remain the highest among the advanced and emerging G20 countries due to support from tax measures and continued monetary easing.
- Finance Minister Nirmala Sitharaman said that the Centre had released Rs 1.46 trillion to states in special assistance for capital expenditure, which is over 95% of the budget allocation till March 26.
- Finance Minister (FM) Nirmala Sitharaman said raising money is as important as managing debt, and while borrowing may be tempting, it must align with present realities.
- The Madhya Pradesh Cabinet approved the proposal for the 'Mukhyamantri Sugam Parivahan Sewa', a new public transport service under the public-private partnership (PPP) model.
- The CBIC to introduce electronic processing of import/ export through personal carriage by air passengers from May 1 at specified airports.
- The Reserve Bank of India (RBI) said the joint account in banks can be continued after the death of a central government pensioner if the spouse, who is authorised to receive family pension, is the survivor.
- The Reserve bank of India has announced an open market operation (OMO) purchase for an aggregate amount of Rs 80,000 crore in four tranches of Rs 20,000 crore on April 3, April 8, April, April 22 and April 29 each.
- The Reserve Bank of India (RBI) Governor Sanjay Malhotra said the bank is working to improve the financial system by expanding access, improving efficiency, and strengthening resilience in a changing economic landscape.
- SEBI granted extension till July 31 for NSDL to launch its Rs 3,000 crore initial public offer (IPO).

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.40	7.29	8.06	8.08	9.33
3-Yr	6.44	7.11	7.88	7.90	9.15
5-Yr	6.45	7.11	8.00	8.01	9.27
10-Yr	6.58	7.11	8.00	8.01	9.27

* Weighted average yields



Global Indices	Apr 1	1D % Chg	3M % Chg	1Y % Chg
DJIA	41990	-0.03	-1.30	6.12
Nasdaq	17450	0.87	-9.64	6.42
FTSE 100	8635	0.61	5.65	8.86
DAX	22540	1.70	13.21	21.99
Nikkei 225	35624	0.02	-10.70	-10.50
Hang Seng	23207	0.38	15.69	41.57
KOSPI	2521	1.62	5.08	-8.24

Global 10 yr Sov. Yields (%)	Apr 1	1D Ago	3M Ago	1Y Ago
US	4.17	4.23	4.58	4.31
UK	4.63	4.68	4.57	3.98
German	2.68	2.73	2.36	2.30
Japan	1.50	1.49	1.07	0.73

Commodity Prices	Apr 1	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	74.49	74.77	74.64	87.42
NYMEX Crude Oil (\$/bbl)	71.2	71.48	71.72	83.71
Gold (Rs / 10 gm)#	91115	89164	76583	68663

ibjarates spot prices

Currencies Vs INR	Mar 28	1D Ago	M Ago	3M Ago
USD	85.58	85.76	87.40	85.52
GBP	110.74	110.86	109.98	106.22
Euro	92.32	92.45	90.78	88.25
100 Yen	56.75	57.01	58.30	54.23
Forex Reserve (\$ bn)*	658.80	654.27	640.48	644.39

* Data pertains to Mar 21 and Mar 14 respectively Source: CRISIL

Key Macro Indicators	
CPI	3.61% (February-2025)
WPI	2.38% (February-2025)
IIP	5.0% (January -2025)
GDP Growth Rate	6.2% (Oct-Dec FY25)

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Capital Market

- Runwal Enterprises has filed draft papers with markets regulator Sebi seeking its approval to garner Rs 1,000 crore through an Initial Public Offering (IPO).
- IndiQube got approval from markets regulator Securities and Exchange Board of India (Sebi) to raise Rs 850 crore through an initial public offer.
- ESDS Software Solution Ltd has filed preliminary papers with capital markets regulator Sebi to mop up Rs 600 crore through an initial public offering (IPO).
- Anand Rathi Share and Stockbrokers, refiled its Draft Red Herring Prospectus (DRHP) with the Securities and Exchange Board of India (Sebi), for its Initial Public Offering (IPO).
- Jain Resource Recycling filed the Draft red herring prospectus (DRHP) with the Securities and Exchange Board of India (Sebi), for its Initial Public Offering (IPO).

Global Equity

- Wall Street stocks ended mixed on Tuesday with Nasdaq gaining led by rebounds in tech stocks while Dow Jones declined due to losses in healthcare stocks amid uncertainty over tariff announcements.
- 10-year US bond yield ended lower at 4.17% as slow weak economic data and tariff announcements boosted safe haven demand for bond.
- FTSE index closed higher on Tuesday supported by gains in energy and financial stocks.
- Asian markets were trading higher at 8.30 AM.

International

- US JOLTs Job Openings stood at 75,68,000 in February compared to 774,000 in January.
- US S&P Global Manufacturing PMI eased to 50.20 points in March 2025 compared to 52.70 points in February 2025.
- US ISM Manufacturing Prices in March stood at 69.4 compared to 62.4 in February.
- Eurozone annual flash inflation eased to 2.2% in March 2025 compared to 2.3% in February 2025 while the annual flash core inflation declined 2.4% from 2.6%.
- Eurozone HCOB Manufacturing PMI rose to 48.6 in March 2025, compared to 47.6 in February 2025.

Upcoming market indicators

- US ADP Employment Change, March (April 2)
- US Factory Orders, February (April 2)
- Eurozone ECB Consumer Inflation Expectations, February (April 2)
- US Balance of Trade, February (April 3)
- US S&P Global services/composite PMI Final, March (April 3)
- US ISM Services PMI, March (April 3)
- US Manufacturing Payrolls, March (April 4)
- US Nonfarm Payrolls Private, March (April 4)
- Eurozone HCOB Construction PMI, March (April 4)
- UK S&P Global Construction PMI, March (April 4)
- Japan Household Spending, February (April 4)