

Broad Indices	Apr 24	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	79801	-0.39	4.74	8.05	22.24
Nifty 50	24247	-0.34	5.00	8.23	21.91
BSE Mid cap	43590	-0.16	2.05	6.43	35.20
Nifty Midcap 100	54970	-0.13	3.20	9.96	34.48

Sectoral Indices	Apr 24	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	50112	-0.22	0.29	0.62
BSE Bankex	63007	-0.31	15.14	15.39
BSE CD	58076	-0.19	-0.17	6.72
BSE CG	62803	-0.04	0.92	0.16
BSE FMCG	20714	-0.82	1.70	6.42
BSE Healthcare	42930	0.55	1.72	22.86
BSE IT	34803	-0.11	-18.52	1.54
BSE Metal	29557	0.26	3.69	-4.83
BSE Oil & Gas	26231	-0.17	4.17	-8.28
BSE Power	6880	-0.22	6.49	-1.80
BSE Realty	6858	-1.39	2.10	-9.50

Nifty			
Top Out performers	% Change	Top Under performers	% Change
IndusInd Bank	3.22	HUL	-4.06
UltraTechCement	1.76	Bharti Airtel	-1.91
Grasim	1.62	Eicher Motors	-1.56
Tata Motors	1.28	ICICI Bank	-1.52
Dr Reddys Labs	1.22	Eternal	-1.20

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Apr 23	MF Inv Apr 22	DII Inv Apr 24
Buy	17857	10830	13452
Sell	13890	12802	13987
Net	3967	-1972	-535
Net (YTD)	-122326	131465	200470

Policy rates	Apr 24	1W Ago	M Ago	3M Ago
Repo (%)	6.00	6.00	6.25	6.50
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.00	4.00	4.00	4.00
Overnight rates	Apr 24	1W Ago	M Ago	3M Ago
Call (%)	5.50	5.75	5.80	6.40
10 Yr Gilt(%)^	6.32	6.37	6.63	6.72
TREP (%)	5.75	5.60	6.11	6.60
Short-term debt	Apr 24	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.80	6.77	7.75	7.93
6-month CPs (%)	6.99	7.08	7.80	7.97
3-month CDs (%)	6.45	6.47	7.35	7.53
6-month CDs (%)	6.64	6.72	7.45	7.66
182-day T-bill (%)^	5.94	5.96	6.51	6.70
364-day T-bill (%)^	5.94	6.00	6.47	6.61
Long-term debt	Apr 24	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.05	6.05	6.49	6.64
5-Y G-sec (%)	6.10	6.10	6.51	6.69
10-Y G-sec (%)	6.32	6.37	6.63	6.72

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended lower on Thursday, dragged down by profit booking in financial stocks and heightened geopolitical tensions between India and Pakistan.
- Top losers were HUL, Bharti Airtel, Eicher Motors, ICICI Bank and Eternal, down 1.20-4.06%.
- Top gainers were IndusInd Bank, UltraTech Cement, Grasim, Tata Motors and Dr Reddy's Labs, up 1.22-3.22%.

Indian Debt

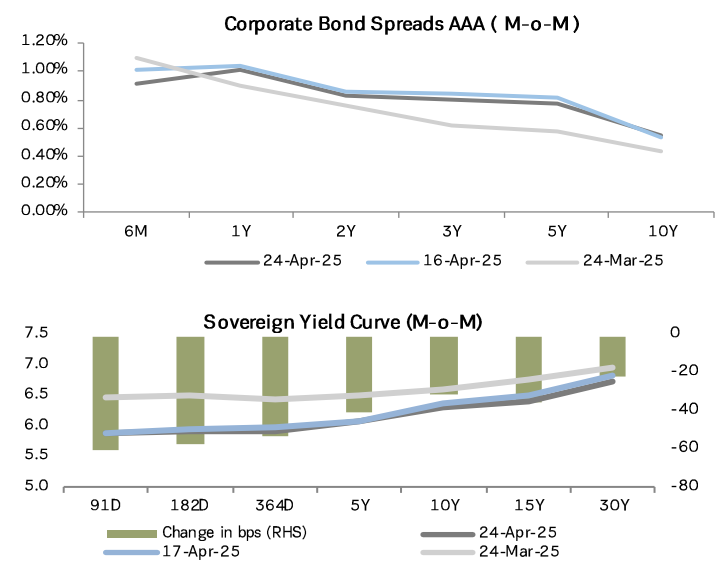
- The interbank call money rate ended lower at 5.50% on Thursday compared to 5.95% on Wednesday.
- Government bond prices ended higher on Thursday, due to escalating geopolitical tensions.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.32% on Thursday compared to 6.33% on Wednesday.

Economy and Government

- Prime Minister Narendra Modi inaugurated and laid the foundation stones for multiple development projects worth over Rs 13,480 crore in Bihar's Madhubani.
- Nitin Gadkari announced plans for a safety assessment rating system for trucks and heavy commercial vehicles, mirroring the Bharat NCAP.
- According to recent Monetary Policy Committee (MPC) minutes, the Reserve Bank of India (RBI) signals a shift towards prioritizing economic growth.
- The Securities and Exchange Board of India (Sebi) has clarified norms on the appointment and tenure of secretarial auditors for listed companies.
- SEBI tweaked the framework for ESG Rating Providers (ERPs), especially for those using a subscriber-pays model, requiring them to share ESG (Environmental, Social, and Governance) rating reports with both subscribers and the rated issuer simultaneously.
- SEBI has standardised disclosures in draft scheme offer document and simplified public issue processes to facilitate ease of doing business for Small and Medium REITs (SM REITs), markets regulator.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.99	6.95	7.68	7.71	8.95
3-Yr	6.05	6.96	7.69	7.72	8.96
5-Yr	6.10	6.97	7.80	7.83	9.08
10-Yr	6.32	6.98	7.81	7.84	9.09

* Weighted average yields



Global Indices	Apr 24	1D % Chg	3M % Chg	1Y % Chg
DJIA	40093	1.23	-9.75	4.24
Nasdaq	17166	2.74	-13.97	9.25
FTSE 100	8407	0.05	-1.12	4.57
DAX	22065	0.47	3.13	21.98
Nikkei 225	35039	0.49	-12.25	-8.89
Hang Seng	21910	-0.74	9.19	27.37
KOSPI	2522	-0.13	-0.57	-5.73

Global 10 yr Sov. Yields (%)	Apr 24	1D Ago	3M Ago	1Y Ago
US	4.32	4.40	4.63	4.65
UK	4.50	4.56	4.63	4.37
German	2.44	2.49	2.54	2.59
Japan	1.34	1.36	1.23	0.88

Commodity Prices	Apr 24	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.55	66.12	78.5	88.02
NYMEX Crude Oil (\$/bbl)	62.79	62.27	74.66	82.81
Gold (Rs / 10 gm)#	96286	96085	80348	71826

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Currencies Vs INR	Apr 24	1D Ago	M Ago	3M Ago
USD	85.51	85.44	85.83	86.29
GBP	113.53	113.69	111.02	107.09
Euro	97.05	97.30	93.02	90.21
100 Yen	59.90	60.20	57.35	55.59
Forex Reserve (\$ bn)*	677.84	676.27	654.27	623.83

* Data pertains to Apr 4 and Mar 28 respectively Source: CRISIL

Key Macro Indicators	
CPI	3.34% (March-2025)
WPI	2.05% (March -2025)
IIP	2.9% (February -2025)
GDP Growth Rate	6.2% (Oct-Dec FY25)

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Capital Market

- Prestige Hospitality Ventures Ltd filed its draft red herring prospectus (DRHP) with SEBI to raise up to Rs 2,700 crore through an initial public offering (IPO).
- Nexus Select Trust approved a plan to raise up to Rs 550 crore through the issuance of listed, rated, redeemable, non-convertible debentures (NCDs).
- Max India plans to raise up to Rs 125 crore through a rights issue.
- PB Fintech received an approval from board for an investment of Rs 696 cr in in the subsidiary through the subscription or purchase of equity shares during FY26.
- GreenGrahi raised Rs 32 crore (\$3.73 million) in a seed funding round led by Avaana Capital.
- Jaypee Infratech plans to invest around Rs 6,000 crore over the next three years to complete stalled housing projects, comprising 20,000 units.

Global Equity

- Wall Street stocks ended higher on Thursday, driven by gains in technology stocks as investors digested a mixed bag of corporate earnings and remained focused on US-China trade negotiations.
- 10-year US bond yield ended higher at 4.32% amid lingering worries around global trade war.
- FTSE index closed flat on Thursday, as investors weighed corporate earnings and US trade policy shifts.
- Asian markets were trading higher at 8.30 AM.

International

- US Chicago Fed National Activity Index fell to -0.03 in March 2025 compared to 0.24 in February 2025.
- US Kansas Fed Composite Index narrowed to -4 in April compared to -2 in March 2025.
- US New orders for manufactured durable goods surged 9.2% over-month to \$315.7 billion in March 2025 compared to 0.9% in February 2025.
- US Initial jobless claims rose by 6,000 from the previous week to 222,000 on the third week of April compared to 216,000.
- UK Business Confidence fell to -33 points in the second quarter of 2025 compared to -47 points in the first quarter of 2025.
- UK GfK Consumer Confidence Index fell 4 points to -23 in April 2025 compared to -19 in March 2025.

Upcoming market indicators

- US Dallas Fed Manufacturing Index, April (April 28)
- US House Price Index, February (April 29)
- US JOLTs Job Openings, March (April 29)
- US Dallas Fed Services Index, April (April 29)
- US GDP Growth Rate QoQ Adv Q1 (April 30)
- US PCE Price Index, March (April 30)
- US Core PCE Price Index, March (April 30)