

Broad Indices	May 13	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81148	-1.55	6.58	11.50	22.62
Nifty 50	24578	-1.39	6.72	11.19	22.08
BSE Mid cap	43807	0.17	7.40	6.39	35.38
Nifty Midcap 100	55521	0.19	9.12	11.63	32.93

Sectoral Indices	May 13	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	51905	-0.96	3.77	1.33
BSE Bankex	62581	-0.87	11.52	14.81
BSE CD	58529	0.14	4.47	12.76
BSE CG	65953	1.04	11.82	6.71
BSE FMCG	20513	-1.07	6.18	3.23
BSE Healthcare	41999	0.96	2.38	19.67
BSE IT	36698	-2.21	-9.63	8.61
BSE Metal	29835	-0.95	6.32	-3.52
BSE Oil & Gas	26588	-0.95	11.93	-3.79
BSE Power	6609	-1.00	10.43	-7.76
BSE Realty	6713	-0.83	1.44	-9.47

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Bharat Electronics	4.01	Infosys	-3.58
Hero Motocorp	1.97	Power Grid Corp	-3.43
Jio Financial	1.71	Eternal	-3.28
Dr Reddys Labs	0.96	HCL Tech	-3.04
Sun Pharma	0.82	TCS	-2.91

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv May 12	MF Inv May 8	DII Inv May 13
Buy	24263	9678	16552
Sell	26651	9910	12278
Net	-2388	-232	4274
Net (YTD)	-95221	143149	229452

Policy rates	May 13	1W Ago	M Ago	3M Ago
Repo (%)	6.00	6.00	6.00	6.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.00	4.00	4.00	4.00
Overnight rates	May 13	1W Ago	M Ago	3M Ago
Call (%)	5.45	5.85	5.62	5.80
10 Yr Gilt(%)^	6.33	6.35	6.44	6.71
TREP (%)	5.00	5.85	5.52	6.44
Short-term debt	May 13	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.80	6.74	6.85	7.75
6-month CPs (%)	7.04	6.96	7.06	7.90
3-month CDs (%)	6.53	6.50	6.50	7.41
6-month CDs (%)	6.73	6.64	6.75	7.60
182-day T-bill (%)^	5.87	5.90	6.04	6.53
364-day T-bill (%)^	5.86	5.88	6.02	6.53
Long-term debt	May 13	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.99	6.02	6.17	6.64
5-Y G-sec (%)	6.02	6.08	6.23	6.69
10-Y G-sec (%)	6.33	6.35	6.44	6.71

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended lower on Tuesday due to losses in auto and financial services sectors amid escalated geopolitical tensions, ahead of domestic and US inflation data.
- The top gainers were Bharat Electronics Ltd, Hero MotoCorp, Jio Financial, Dr Reddy's Laboratories and Sun Pharmaceutical Industries, rising 0.82-4.01%.
- The top losers were Infosys, Power Grid Corp, Eternal, HCL Technologies and TCS, down 2.91-3.58%.

Indian Debt

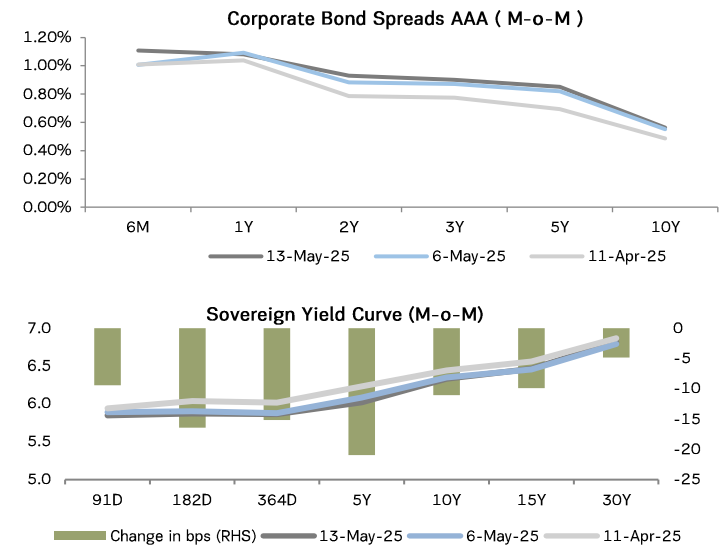
- The interbank call money rate ended lower at 5.45% on Tuesday compared to 5.85% on Friday.
- Government bond prices ended higher on Tuesday, as better-than-expected domestic inflation data boosted rate cut hopes.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.33% on Tuesday compared to 6.37% on Friday.

Economy and Government

- India retail inflation rate eased to 3.16% in April 2025 compared to 3.34% in March 2025.
- Finance Minister Nirmala Sitharaman reviewed the progress of the government's financial inclusion schemes.
- The Securities and Exchange Board of India (Sebi) proposed regulatory relaxations for foreign portfolio investors (FPIs) investing solely in Indian government bonds under the Voluntary Retention Route (VRR) and Fully Accessible Route (FAR).
- Sebi extended the deadline to July 31 for the certification requirement for Alternative Investment Fund (AIF) managers.
- The Telecom Regulatory Authority of India (Trai) floated a draft manual for rating properties based on the quality of digital connectivity available on their premises.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.90	6.95	7.68	7.71	8.95
3-Yr	5.99	6.98	7.71	7.74	8.98
5-Yr	6.02	6.98	7.81	7.84	9.09
10-Yr	6.33	7.00	7.83	7.86	9.11

* Weighted average yields



Global Indices	May 13	1D % Chg	3M % Chg	1Y % Chg
DJIA	42140	-0.64	-5.75	6.87
Nasdaq	19010	1.61	-4.69	16.00
FTSE 100	8603	-0.02	-1.85	2.23
DAX	23639	0.31	4.54	26.12
Nikkei 225	38183	1.43	-3.24	0.01
Hang Seng	23108	-1.87	5.93	20.89
KOSPI	2608	0.04	0.98	-4.36

Global 10 yr Sov. Yields (%)	May 13	1D Ago	3M Ago	1Y Ago
US	4.49	4.45	4.52	4.48
UK	4.67	4.64	4.49	4.21
German	2.68	2.64	2.42	2.51
Japan	1.45	1.47	1.34	0.94

Commodity Prices	May 13	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.63	64.96	75.02	83.36
NYMEX Crude Oil (\$/bbl)	63.67	61.95	71.29	79.12
Gold (Rs / 10 gm)#	94344	93076	85748	72164

ibjarrates spot prices

Currencies Vs INR	May 13	1D Ago	M Ago	3M Ago
USD	84.89	85.64	86.14	86.88
GBP	112.03	113.40	112.01	108.56
Euro	94.30	96.29	97.11	90.67
100 Yen	57.40	58.92	59.82	56.40
Forex Reserve (\$ bn)*	686.06	688.13	676.27	630.61

* Data pertains to May 2 and Apr 25 respectively Source: CRISIL

Key Macro Indicators	
CPI	3.16% (April-2025)
WPI	2.05% (March -2025)
IIP	3.0% (March -2025)
GDP Growth Rate	6.2% (Oct-Dec FY25)

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Capital Market

- JSW One Platforms announced a Rs 340-crore fundraise from Principal Asset Management and OneUp.
- Credit Saison (CS) India has secured an ECB funding of \$150 million from Mizuho Bank under a bilateral arrangement.
- Flam raised \$14 million in its Series A round led by RTP Global, with participation from Dovetail and other strategic investors.
- Agentic AI startup Adopt AI raised \$6 million in round led by Elevation Capital.
- Biryani Blues raised \$5 million (over Rs 40 crore) in a funding round led by Carpediem Capital's new fund Yugadi Capital with participation of other investors.
- Greaves Electric Mobility Ltd received approval for an initial public offering (IPO) from SEBI.
- PayU has received final approval from the Reserve Bank of India (RBI) to operate as an online payment aggregator.

Global Equity

- Wall Street stocks ended mixed on Tuesday as Nasdaq rose lifted by softer inflation data and trade truce optimism while the Dow Jones was weighed down by losses in the healthcare sector.
- 10-year US bond yield ended higher at 4.49% following softer than expected inflation data
- FTSE index closed flat on Tuesday as US inflation concerns and UK jobs data raised rate cut hopes.
- Asian markets were trading mixed at 8.30 AM.

International

- US annual inflation rate eased to 2.3% in April 2025 compared to 2.4% in March 2025 while the annual core consumer price inflation rate stood at 2.8% in April 2025, unchanged from March.
- UK unemployment rate edged higher to 4.5% from January to March 2025, compared to 4.4% for last four consecutive periods.
- Japan Producer prices rose by 4.0% in April 2025 compared to a marginally revised 4.2% in March 2025.

Upcoming market indicators

- Japan PPI, April (May 14)
- India WPI Inflation, April (May 14)
- US PPI, April (May 15)
- US Industrial Production, April (May 15)
- US Manufacturing Production, April (May 15)
- US Retail Sales, April (May 15)
- US NAHB Housing Market Index, May (May 15)
- US Housing Starts, April (May 16)
- US Michigan Consumer Expectations/Sentiment Prel, May (May 16)
- Eurozone Balance of Trade, March (May 16)