

Broad Indices	Aug 6	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80544	-0.21	-0.12	2.48	22.55
Nifty 50	24574	-0.31	0.80	2.42	21.75
BSE Mid cap	45142	-1.00	6.49	-1.07	33.93
Nifty Midcap 100	56750	-0.80	6.20	2.22	31.56

Sectoral Indices	Aug 6	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53082	-0.52	4.28	-4.43
BSE Bankex	61684	0.10	0.20	9.16
BSE CD	59930	-0.14	6.58	3.67
BSE CG	68131	-0.83	9.68	-2.89
BSE FMCG	20360	-0.80	-1.19	-8.46
BSE Healthcare	43412	-1.72	3.33	8.47
BSE IT	33907	-1.64	-3.55	-13.72
BSE Metal	30974	-0.38	7.73	2.04
BSE Oil & Gas	26102	-0.18	-1.97	-15.36
BSE Power	6654	-0.61	2.36	-17.72
BSE Realty	6941	-1.55	4.69	-11.23

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Asian Paints	2.23	Wipro	-2.42
HDFC Life	1.90	Sun Pharma	-2.26
Bharat Electronics	0.79	IndusInd Bank	-1.93
Trent	0.73	Jio Financial	-1.89
Adani Ports	0.66	Tech Mahindra	-1.78

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 5	MF Inv Aug 4	DII Inv Aug 6
Buy	16759	10405	15289
Sell	15197	7140	9335
Net	1561	3265	5955
Net (YTD)	-98295	287399	416913

Policy rates	Aug 6	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.50	5.50	6.00
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.00	4.00	4.00	4.00
Overnight rates	Aug 6	1W Ago	M Ago	3M Ago
Call (%)	4.90	5.36	4.75	5.85
10 Yr Gilt(%)^	6.41	6.37	6.30	6.35
TREP (%)	5.00	5.37	5.00	5.85
Short-term debt	Aug 6	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.18	6.18	6.20	6.74
6-month CPs (%)	6.36	6.36	6.40	6.96
3-month CDs (%)	5.80	5.75	5.78	6.50
6-month CDs (%)	6.03	6.03	6.00	6.64
182-day T-bill (%)^	5.50	5.50	5.48	5.90
364-day T-bill (%)^	5.55	5.54	5.53	5.88
Long-term debt	Aug 6	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.90	5.88	5.83	6.02
5-Y G-sec (%)	6.15	6.11	6.06	6.08
10-Y G-sec (%)	6.41	6.37	6.30	6.35

^Weighted average yield

## Indian Equity

- Indian equity benchmarks ended lower on Wednesday due to persistent worries over US trade tariffs and after the RBI kept its policy repo rate and stance unchanged, dampening hopes for a more dovish signal amid global trade headwinds.
- The top losers were, Wipro, Sun Pharma, IndusInd Bank, Jio Financial Services and Tech Mahindra, down 1.78-2.42%.
- The top gainers were, Asian Paints, HDFC Life, Bharat Electronics, Trent and Adani Ports, up 0.66-2.23%.

## Indian Debt

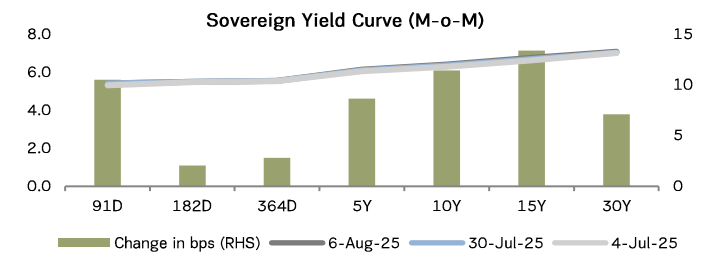
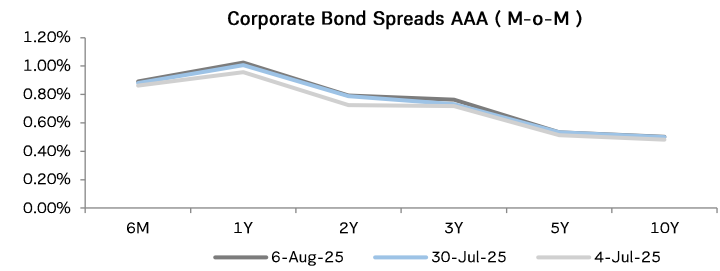
- The interbank call money rate ended flat at 4.90% on Wednesday.
- Government bond prices ended lower on Wednesday after the RBI held rates steady and trimmed FY26 inflation forecast to 3.1%, defying rate cut hopes.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.41% on Wednesday compared to 6.33% on Tuesday.

## Economy and Government

- The Monetary Policy Committee (MPC) of the Reserve Bank of India (RBI) voted unanimously to hold the policy repo rate at 5.50%.
- Accordingly, the standing deposit facility, marginal standing facility and bank rates remained unchanged at 5.25%, 5.27% and 6.75%, respectively. The MPC wants to assess the full impact of past actions on inflation and growth by maintaining a neutral policy stance, signalling policy continuity and stability.
- US President has signed an executive order imposing an additional 25% tariff on India in response to its continued purchase of Russian oil.
- Prime Minister Narendra Modi inaugurated the Kartavya bhavan at Kartavya Path in Delhi.
- The government approved over 700 additional CISF personnel to secure the Common Central Secretariat (CCS), including the newly inaugurated Kartavya Bhavan.
- The government proposed 2022-23 as new base year for the Gross Domestic Product (GDP) and Index of Industrial Production (IIP), and 2024 for Consumer Price Index (CPI).
- The Uttar Pradesh government plans to provide subsidised agricultural equipment to farmers through an e-lottery system.
- RBI Governor Sanjay Malhotra announced, that the process for legal heirs to access bank accounts and lockers of deceased individuals will soon be simplified.
- The Reserve Bank of India has introduced three customer-centric measures, including simplified KYC procedures via panchayat-level camps, streamlined claims for deceased account holders, and enhanced features on the Retail Direct platform for government securities.
- Reserve Bank of India (RBI) Governor Sanjay Malhotra clarified that the Unified Payments Interface (UPI), though free for users, comes with a cost and someone in the system must absorb it.
- Reserve Bank of India (RBI) Governor Sanjay Malhotra said the Indian economy is contributing more to global growth than the United States.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.63	6.55	7.26	7.30	8.53
3-Yr	5.90	6.73	7.44	7.48	8.71
5-Yr	6.15	6.77	7.58	7.61	8.85
10-Yr	6.41	7.00	7.81	7.84	9.08

\* Weighted average yields



Global Indices	Aug 6	1D % Chg	3M % Chg	1Y % Chg
DJIA	44193	0.18	8.24	13.32
Nasdaq	21169	1.21	19.67	29.34
FTSE 100	9164	0.24	6.59	14.17
DAX	23924	0.33	2.90	37.86
Nikkei 225	40795	0.60	10.76	17.65
Hang Seng	24911	0.03	9.92	49.64
KOSPI	3198	0.00	24.94	26.80

Global 10 yr Sov. Yields (%)	Aug 6	1D Ago	3M Ago	1Y Ago
US	4.22	4.22	4.30	3.90
UK	4.52	4.52	4.51	3.92
German	2.64	2.62	2.53	2.18
Japan	1.50	1.47	1.29	0.89

Commodity Prices	Aug 6	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.89	67.64	62.15	76.48
NYMEX Crude Oil (\$/bbl)	64.35	65.16	59.09	73.2
Gold (Rs / 10 gm)#	100452	100076	96888	69182

# ibjارات spot prices

Currencies Vs INR	Aug 6	1D Ago	M Ago	3M Ago
USD	87.70	87.79	85.39	84.54
GBP	116.69	116.62	116.78	112.36
Euro	101.60	101.42	100.60	95.69
100 Yen	59.47	59.68	59.18	58.77
Forex Reserve (\$ bn)*	698.19	695.49	702.78	688.13

\* Data pertains to July 25 and July 18 respectively Source: CRISIL

Key Macro Indicators	
CPI	2.10% (Jun-2025)
WPI	-0.13% (Jun-2025)
IIP	1.5% (Jun -2025)
GDP Growth Rate	7.4% (Jan-Mar FY25)

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## Capital Market

- NHPC and NTPC Green Energy plan to raise a combined Rs 4,500 crore through short-term bond sales this month.
- Prestige Hospitality Ventures Limited secured regulatory approval from the Securities and Exchange Board of India (SEBI) for its proposed Rs 2,700 crore initial public offering (IPO).
- Core Energy Systems announced a Rs 200 crore fund raise from a clutch of investors.
- All Time Plastics garnered Rs 120 crore from anchor investors ahead of its initial share-sale opening for public subscription.
- Rillet raised \$70 million in a fundraise co-led by venture capital firms Andreessen Horowitz and Iconiq in a bid to disrupt an industry dominated by tools from Oracle and Microsoft.
- SuperGaming raised \$15 million in funding round led by Skycatcher, Steadview Capital at \$100 million valuation.

## Global Equity

- Wall Street stocks closed higher on Wednesday boosted by upbeat corporate earnings and gains in Apple stocks on domestic manufacturing plans.
- 10-year US bond yield ended flat at 4.22% as investors remained on the edge due to tariff uncertainty.
- FTSE index closed higher on Wednesday as investors assessed corporate earnings and awaited a potential Bank of England rate cut.
- Asian markets were trading mixed at 8.30 AM.

## International

- Eurozone HCOB Construction PMI edged down to 44.7 in July 2025 compared to 45.2 in June 2025.
- Eurozone Retail Sales increased 3.1% in June 2025 compared to a 1.9% gain in May 2025.
- UK S&P Global Construction PMI fell to 44.3 in July 2025 compared to 48.8 in June 2025.

## Upcoming market indicators

- US Initial Jobless Claims, Aug/02 (Aug 7)
- US Nonfarm Productivity QoQ Prel Q2 (Aug 7)
- UK Halifax House Price Index, July (Aug 7)
- UK BoE Interest Rate Decision (Aug 7)
- China Inflation Rate, Jul (Aug 9)
- China PPI, Jul (Aug 9)
- US Inflation Rate, Jul (Aug 12)
- US CPI Jul (Aug 12)
- Uk Unemployment Rate, Jun (Aug 12)
- India Inflation Rate, Jul (Aug 12)
- Japan PPI, July (Aug 13)
- UK PPI, Jul (Aug 14)
- US Initial Jobless Claims, Aug/09 (Aug 14)