

Broad Indices	Aug 7	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80623	0.10	-0.15	1.45	22.57
Nifty 50	24596	0.09	0.74	1.23	21.71
BSE Mid cap	45279	0.30	5.37	-3.31	33.93
Nifty Midcap 100	56938	0.33	4.88	0.11	31.62

Sectoral Indices	Aug 7	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53216	0.25	2.76	-5.95
BSE Bankex	61770	0.14	-0.20	8.31
BSE CD	60040	0.18	5.66	2.52
BSE CG	67849	-0.41	8.76	-6.01
BSE FMCG	20351	-0.05	-0.83	-9.75
BSE Healthcare	43644	0.53	3.96	6.88
BSE IT	34154	0.73	-3.04	-14.51
BSE Metal	31025	0.16	6.64	-1.20
BSE Oil & Gas	26057	-0.17	-2.57	-18.56
BSE Power	6630	-0.36	1.03	-19.68
BSE Realty	6936	-0.07	3.46	-12.86

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Hero Motocorp	4.15	Adani Enterpris	-2.20
Tech Mahindra	1.58	Adani Ports	-1.59
JSW Steel	1.16	Trent	-0.99
Wipro	0.98	Tata Motors	-0.97
Eternal	0.97	Grasim	-0.80

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 6	MF Inv Aug 4	DII Inv Aug 7
Buy	11690	10405	19116
Sell	16088	7140	8356
Net	-4399	3265	10760
Net (YTD)	-102693	287399	427674

Policy rates	Aug 7	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 7	1W Ago	M Ago	3M Ago
Call (%)	5.80	4.95	4.90	5.50
10 Yr Gilt(%)^	6.39	6.38	6.30	6.34
TREP (%)	5.80	5.40	5.26	5.73
Short-term debt	Aug 7	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.18	6.18	6.20	6.80
6-month CPs (%)	6.36	6.36	6.40	6.96
3-month CDs (%)	5.77	5.75	5.73	6.50
6-month CDs (%)	6.03	6.03	6.00	6.65
182-day T-bill (%)^	5.51	5.50	5.41	5.87
364-day T-bill (%)^	5.51	5.52	5.52	5.84
Long-term debt	Aug 7	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.92	5.87	5.81	6.00
5-Y G-sec (%)	6.14	6.11	6.05	6.04
10-Y G-sec (%)	6.39	6.38	6.30	6.34

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended higher on Thursday due to short covering at lower level.
- The top gainers were Hero MotoCorp, Tech Mahindra, JSW Steel, Wipro and Eternal, up 0.97-4.15%.
- The top losers were, Adani Enterprises, Adani Ports, Trent, Tata Motors and Grasim, down 0.80-2.20%.

Indian Debt

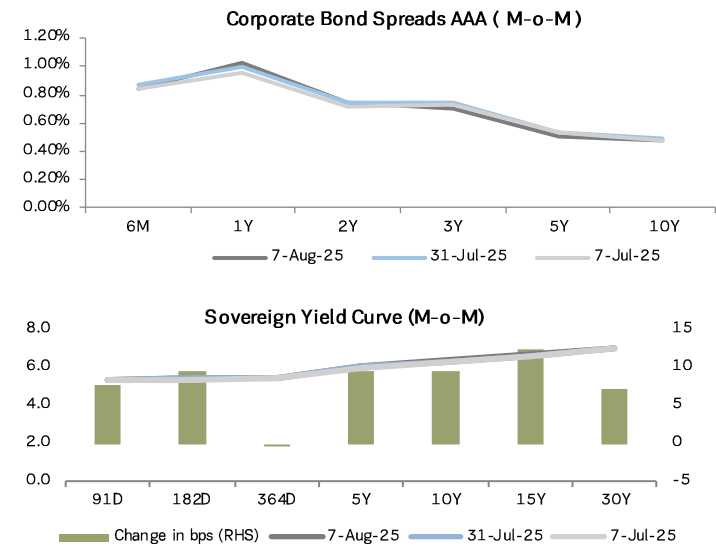
- The interbank call money rate ended higher at 5.80% on Thursday compared to 4.90% on Wednesday.
- Government bond prices ended higher on Thursday due to short covering at lower levels.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.39% on Thursday compared to 6.41% on Wednesday.

Economy and Government

- The Rajasthan government signed 1,600 memoranda of understanding (MoUs) with a proposed investment of over Rs 1.37 trillion in the tourism sector
- The power ministry planned to develop an additional 97 GW coal and lignite-based electricity generation capacity to achieve the required 307 GW of thermal installed capacity by 2034-35.
- The Reserve Bank of India (RBI) has directed banks not to insist on the production of legal documents where an account was opened with a survivorship clause and has nominees or survivors.
- According to a latest survey by RBI, India's merchandise imports to grow by 2 times more than exports in the current financial year.
- The Reserve Bank of India (RBI) plans to conduct two Variable Rate Reverse Repo (VRRR) auctions on Friday—of six-day and three-day tenures—to withdraw a total of Rs 3 trillion from the banking system.
- Sebi mandated a unified annual inspection for stock brokers and depository participants to be conducted jointly by all relevant market infrastructure institutions, replacing the existing practice of separate assessments by each entity.
- Sebi proposed introducing activity-based regulation for Registrars and Transfer Agents (RTAs), whereby services provided to listed companies would fall within its regulatory ambit and those for unlisted firms would be overseen by the Ministry of Corporate Affairs (MCA).

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.64	6.53	7.24	7.28	8.51
3-Yr	5.92	6.71	7.42	7.46	8.69
5-Yr	6.14	6.75	7.56	7.59	8.83
10-Yr	6.39	6.98	7.79	7.82	9.06

* Weighted average yields



Global Indices	Aug 7	1D % Chg	3M % Chg	1Y % Chg
DJIA	43969	-0.51	6.94	13.43
Nasdaq	21243	0.35	19.76	31.16
FTSE 100	9101	-0.69	6.33	11.44
DAX	24193	1.12	4.66	37.34
Nikkei 225	41059	0.65	11.64	17.01
Hang Seng	25082	0.69	10.53	48.61
KOSPI	3228	0.92	25.41	25.67

Global 10 yr Sov. Yields (%)	Aug 7	1D Ago	3M Ago	1Y Ago
US	4.23	4.22	4.26	3.96
UK	4.556	4.52	4.46	3.95
German	2.6369	2.64	2.47	2.27
Japan	1.474	1.50	1.31	0.91

Commodity Prices	Aug 7	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.43	66.89	61.12	78.33
NYMEX Crude Oil (\$/bbl)	63.88	64.35	58.07	75.23
Gold (Rs / 10 gm)#	100703	100452	97426	68941

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Currencies Vs INR	Aug 7	1D Ago	M Ago	3M Ago
USD	87.69	87.70	85.82	84.57
GBP	117.27	116.69	116.76	112.97
Euro	102.38	101.60	100.86	96.13
100 Yen	59.59	59.47	59.15	59.13
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

- OppenheimerFunds sold shares of private sector lender Kotak Mahindra Bank for Rs 2,035 crore through an open market transaction.
- Xovian Aerospace raised \$2.5 million in a pre-seed funding round led by Piper Serica and Turbostart, with participation from Inflection Point Ventures (IPV) and Eaglewings Ventures.
- BLS Polymers filed preliminary papers with markets regulator Sebi to seek its approval for raising funds through an initial public offering (IPO).
- Adani Power received Letter of Intent (LoI) from Bihar State Power Generation Company Ltd. (BSPGCL) to supply 2,274 MW of power to North Bihar Power Distribution Company Ltd (NBPDCL) and South Bihar Power Distribution Company Ltd (SBPDCL).
- BNW Developments plans to launch projects worth Rs 20,000 crore next year.
- Sumadhura Group invested Rs 1,000 crore in Capitol Towers and has leased out five lakh square feet to marquee global office and retail tenants at its flagship commercial tech park.

Global Equity

- Wall Street stocks ended mixed on Thursday with Dow Jones declined due to stock specific losses while Nasdaq rose buoyed by technology stocks after US exempted domestic semiconductor manufacturers from the latest tariffs.
- 10-year US bond yield ended higher at 4.23% after US President said he will nominate Miran to Federal Reserve.
- FTSE index ended lower on Thursday after Bank of England cut interest rates by a quarter percentage points.
- Asian markets were trading mixed at 8.30 AM.

International

- US Initial jobless claims rose by 7,000 to 226,000 in the last week of July 2025 compared to 219,000 from the previous week.
- The Bank of England cut interest rates by 25 bps to 4%, in a rare two-round vote that underscored sharp divisions over how to tackle sticky inflation and a softening economy.
- UK Halifax House Price Index rose by 2.4% in July 2025, compared to 2.7% gain in June- 2025.
- China's trade surplus came in at USD 98.24 billion in July 2025, compared to USD 85.27 billion recorded in the same month a year earlier.
- Japan Coincident Index increased to 116.8 in June 2025 compared to 116.0 in May 2025 while the leading economic index rose to 106.1 from 104.8.

Upcoming market indicators

- 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)