

Broad Indices	Aug 8	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	79858	-0.95	-0.59	1.23	22.35
Nifty 50	24363	-0.95	0.37	1.02	21.48
BSE Mid cap	44571	-1.56	5.73	-4.41	32.81
Nifty Midcap 100	56002	-1.64	5.21	-1.20	31.10

Sectoral Indices	Aug 8	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	52473	-1.40	3.31	-6.94
BSE Bankex	61127	-1.04	-1.00	7.18
BSE CD	59029	-1.68	5.19	1.99
BSE CG	66751	-1.62	7.98	-6.70
BSE FMCG	20200	-0.74	-0.55	-10.08
BSE Healthcare	43161	-1.11	4.54	5.46
BSE IT	33816	-0.99	-4.11	-13.78
BSE Metal	30461	-1.82	6.61	-1.00
BSE Oil & Gas	26029	-0.11	-0.71	-17.44
BSE Power	6573	-0.86	2.06	-19.63
BSE Realty	6792	-2.09	4.01	-13.62

Nifty			
Top Out performers	% Change	Top Under performers	% Change
NTPC	1.52	Bharti Airtel	-3.33
Titan Company	1.30	Adani Enterpris	-3.19
Dr Reddys Labs	0.88	IndusInd Bank	-3.08
HDFC Life	0.77	Shriram Finance	-2.82
Bajaj Finserv	0.27	M&M	-2.08

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 7	MF Inv Aug 6	DII Inv Aug 8
Buy	10489	12964	15970
Sell	16008	7254	8533
Net	-5520	5710	7437
Net (YTD)	-108213	295210	435111

Policy rates	Aug 8	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 8	1W Ago	M Ago	3M Ago
Call (%)	5.00	5.35	4.90	5.85
10 Yr Gilt(%)^	6.40	6.37	6.31	6.40
TREP (%)	5.28	5.00	5.27	5.60
Short-term debt	Aug 8	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	7.00
3-month CDs (%)	5.78	5.73	5.72	6.56
6-month CDs (%)	6.03	6.03	6.00	6.67
182-day T-bill (%)^	5.50	5.50	5.43	5.87
364-day T-bill (%)^	5.54	5.52	5.52	5.86
Long-term debt	Aug 8	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.90	5.87	5.82	6.08
5-Y G-sec (%)	6.15	6.11	6.06	6.12
10-Y G-sec (%)	6.40	6.37	6.31	6.40

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended lower on Friday, dragged down by higher US tariffs, foreign fund outflows and weak earnings in the first quarter of fiscal 2026.
- The top losers were Bharti Airtel, Adani Enterprises, IndusInd Bank, Shriram Finance and Mahindra & Mahindra, down 2.08-3.33%.
- The top gainers were NTPC, Titan Company, Dr Reddys Labs, HDFC Life and Bajaj Finserv, up 0.27-1.52%.

Indian Debt

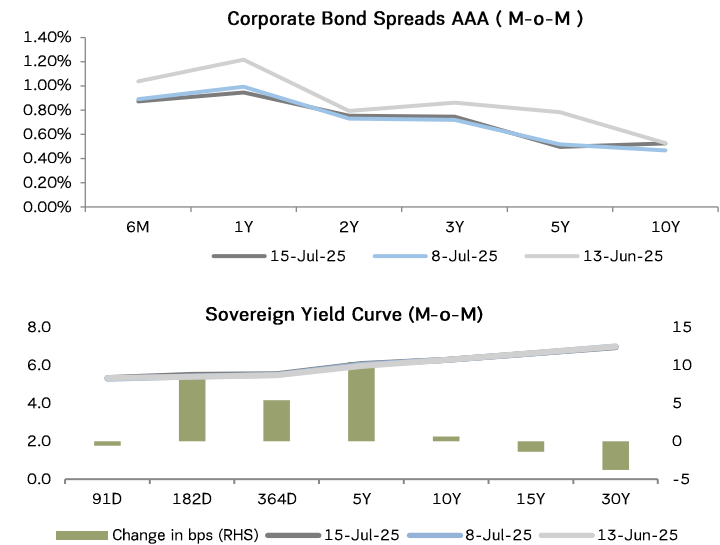
- The interbank call money rate ended lower at 5.00% on Friday compared to 5.80% on Thursday.
- Government bond prices ended lower on Friday as the sentiment was cautious after the RBI held rates and signalled higher inflation.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.41% on Friday compared to 6.39% on Thursday.

Economy and Government

- According to data published by the Reserve Bank of India (RBI), India's foreign exchange reserves registered a decrease of \$9.32 billion, reaching a total of \$688.87 billion for the week ending August 1.
- Moody's Ratings said India's GDP growth is likely to slow down by about 30 basis points to 6% in the current fiscal if the US implements 50% tariffs from August 27.
- Union minister Vaishnaw said that personal details that are subject to public disclosure under various laws will continue to be disclosed under the RTI Act after the implementation of the new data protection rule.
- The government reopened the portal for inviting fresh applications under the performance-linked incentive (PLI) scheme for textiles sector.
- The Union Cabinet approved significant proposals, including the MERITE scheme with a Rs 4,200 crore outlay to enhance technical education across 275 institutions.
- The Union cabinet approved a 46-kilometre (km) National Highway project in Tamil Nadu between Marakkanam and Puducherry at a cost of Rs 2,157 crore.
- Chhattisgarh government inked a deal with the National Hydroelectric Power Corporation (NHPC) for developing two pumped storage projects with a total capacity of 1800 MW in the state.
- The RBI plans to standardise forms to process claims on deceased customers' bank accounts and lockers within a 15-day timeframe and provide compensation to nominees for any settlement delays.
- Securities and Exchange Board of India (Sebi) proposed a single-window gateway for trusted foreign investors called SWAGAT-FI.
- Sebi chief urged redefining role of independent directors as stewards of accountability.
- Sebi has proposed a separate category of Alternative Investment Fund (AIF) schemes, consisting of accredited investors, which will enjoy a lighter-touch regulatory framework compared to regular AIFs.
- Sebi has modified the framework governing the transformation of private listed Infrastructure Investment Trusts (InvITs) to public InvITs, with updated sponsor holding requirements and harmonised disclosure norms.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.62	6.51	7.22	7.26	8.49
3-Yr	5.90	6.69	7.40	7.44	8.67
5-Yr	6.15	6.73	7.54	7.57	8.81
10-Yr	6.40	6.98	7.79	7.82	9.06

* Weighted average yields



Global Indices	Aug 8	1D % Chg	3M % Chg	1Y % Chg
DJIA	44176	0.47	6.79	11.99
Nasdaq	21450	0.98	19.64	28.75
FTSE 100	9096	-0.06	6.61	11.67
DAX	24163	-0.12	3.47	36.66
Nikkei 225	41820	1.85	13.25	20.07
Hang Seng	24859	-0.89	9.15	47.16
KOSPI	3210	-0.55	24.44	25.55

Global 10 yr Sov. Yields (%)	Aug 8	1D Ago	3M Ago	1Y Ago
US	4.27	4.23	4.37	3.99
UK	4.603	4.56	4.55	3.98
German	2.6874	2.64	2.52	2.27
Japan	1.488	1.47	1.37	0.87

Commodity Prices	Aug 8	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.59	66.43	62.84	79.16
NYMEX Crude Oil (\$/bbl)	63.88	63.88	59.91	76.19
Gold (Rs / 10 gm)#	100942	100703	97030	69205

ibjarates spot prices

Currencies Vs INR	Aug 8	1D Ago	M Ago	3M Ago
USD	87.62	87.69	85.72	84.86
GBP	117.66	117.27	116.82	112.76
Euro	102.05	102.38	100.61	95.76
100 Yen	59.48	59.59	58.65	58.80
Forex Reserve (\$ bn)*	688.87	698.19	702.78	688.13

* Data pertains to Aug 1 and July 25 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

- Silver Consumer Electricals Ltd (SCEL) filed preliminary papers with markets regulator Sebi, seeking its approval to raise Rs 1,400 crore through an Initial Public Offering (IPO).
- Technology solutions provider Transline Technologies filed its Draft Red Herring Prospectus (DRHP) with the capital markets regulator, the Securities and Exchange Board of India (Sebi), for its initial public offering (IPO).
- T&T Group plans to transform Raj Nagar Extension's housing market with a Rs 700 crore high-end residential project.
- DLF plans to invest Rs 23,500 cr in ongoing housing projects in NCR, Mumbai.
- DRA Group signed a pact with Philippines-based Balajadia Family office to jointly develop a commercial project with an estimated investment of \$100 million.
- Coromandel International announced the successful closure of the share purchase agreement (SPA) for the acquisition of 53% promoter shareholding in NACL Industries (NACLIND) for Rs 820 crore.

Global Equity

- Wall Street stocks ended higher on Friday driven by tech gains and optimism over potential rate cuts.
- 10-year US bond yield ended higher at 4.27% as investors weighed the effect of higher tariffs on the outlook for US economic growth and inflation.
- FTSE index closed lower on Friday as investors assessed the Bank of England's rate decision.
- Asian markets were trading mixed at 8.30 AM.

International

- China's consumer price inflation came in flat at 0.0% in July following 0.1% growth in the previous month.
- China's producer prices fell 3.6% year-on-year in July 2025 unchanged from the June month.
- Japan household spending rose 1.3% in June 2025, compared to a 4.7% increase in May 2025.
- Japan Economy Watchers Survey edged up to 45.2 in July 2025 compared to 45.0 in June 2025 while the Economy Watchers Survey Outlook increased to 47.30 from 45.90

Upcoming market indicators

- 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)