

Broad Indices	Aug 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80604	0.93	1.45	1.13	22.61
Nifty 50	24585	0.91	2.40	0.89	21.67
BSE Mid cap	44921	0.79	6.67	-4.81	33.12
Nifty Midcap 100	56479	0.85	6.12	-1.22	30.78

Sectoral Indices	Aug 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53015	1.03	4.57	-7.38
BSE Bankex	61818	1.13	1.17	7.59
BSE CD	58760	-0.46	3.38	0.64
BSE CG	66967	0.32	6.55	-7.67
BSE FMCG	20353	0.75	0.85	-9.70
BSE Healthcare	43643	1.12	5.87	6.24
BSE IT	33939	0.36	-3.45	-14.83
BSE Metal	30634	0.57	7.03	-1.29
BSE Oil & Gas	26185	0.60	0.35	-17.62
BSE Power	6629	0.85	4.09	-20.01
BSE Realty	6918	1.86	8.19	-13.37

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Adani Enterpris	4.83	Hero Motocorp	-0.82
Tata Motors	3.16	Bharat Electronics	-0.18
Eternal	2.82	Bharti Airtel	-0.06
Grasim	2.50	NA	NA
Apollo Hospital	2.46	NA	NA

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 8	MF Inv Aug 7	DII Inv Aug 11
Buy	18514	15766	14700
Sell	15687	6663	8748
Net	2826	9103	5951
Net (YTD)	-105387	304314	441062

Policy rates	Aug 11	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 11	1W Ago	M Ago	3M Ago
Call (%)	5.00	4.95	5.00	5.85
10 Yr Gilt(%)^	6.43	6.32	6.30	6.38
TREP (%)	5.20	5.10	5.10	5.77
Short-term debt	Aug 11	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.28	6.18	6.20	6.90
6-month CPs (%)	6.39	6.36	6.35	7.16
3-month CDs (%)	5.80	5.73	5.75	6.64
6-month CDs (%)	6.04	6.00	6.00	6.80
182-day T-bill (%)^	5.51	5.48	5.52	5.90
364-day T-bill (%)^	5.51	5.47	5.56	5.86
Long-term debt	Aug 11	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.95	5.84	5.82	6.04
5-Y G-sec (%)	6.21	6.07	6.08	6.08
10-Y G-sec (%)	6.43	6.32	6.30	6.38

^Weighted average yield

## Indian Equity

- Indian equity benchmarks ended higher on Monday, supported by strong earnings from banks and automobile companies, as well as short covering at lower levels on optimism with regard to the upcoming US-Russia talks.
- The top gainers were, Adani Enterprises, Tata Motors, Eternal, Grasim and Apollo Hospital, up 2.46-4.83%.
- The top losers were Hero MotoCorp, Bharat Electronics and Bharti Airtel, down 0.06-0.82%.

## Indian Debt

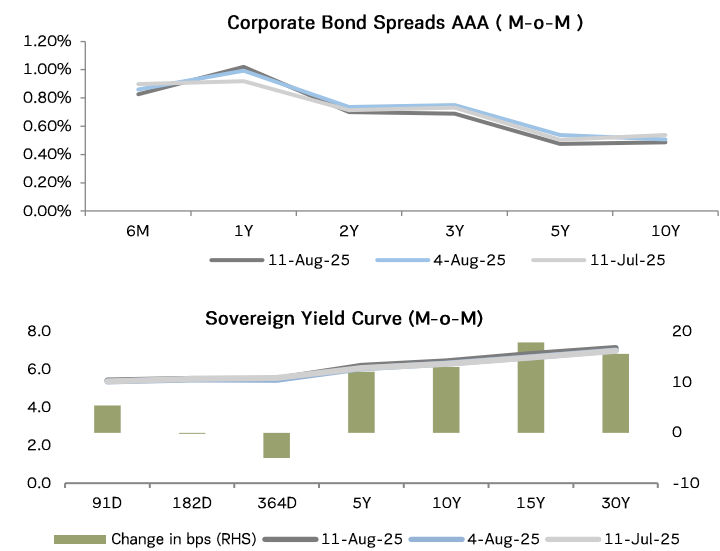
- The interbank call money rate ended flat at 5.00% on Monday.
- Government bond prices ended lower on Monday ahead of release of inflation numbers from India and US.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.44% on Monday compared to 6.41% on Friday.

## Economy and Government

- The Central government will release Rs 3,200 crore installment of Pradhan Mantri Fasal Bima Yojana on Monday.
- The Lok Sabha approved the Taxation Laws (Amendment) Bill, 2025, by extending tax exemptions to subscribers of the Unified Pension Scheme.
- Parliament approved the Merchant Shipping Bill, 2025, which focus to broaden the criteria for owning merchant shipping vessels.
- The Lok Sabha approved the National Sports Governance Bill. The bill aims to make sports federations work fairly and openly.
- Finance Minister Nirmala Sitharaman said there is no proposal under consideration for the restoration of the Old Pension Scheme (OPS) in respect of central government employees covered under the National Pension System (NPS).
- The Union government is proposing to increase contributions from mining proceeds to bolster exploration and development of critical mineral supply chains.
- The Delhi Jal Board (DJB) approved administrative sanctions for sewage treatment plant augmentation and upgradation projects worth Rs 917.33 crore across the city
- The Uttar Pradesh government allocated over Rs 6,000 crore for greenfield township projects across the state.
- Reserve Bank of India Governor Sanjay Malhotra said banks are free to decide the minimum balance for savings accounts and that it does not fall under the regulatory domain of the RBI.
- The IBBI has proposed making it mandatory for the committee of creditors (CoC) to formally record its deliberations on the eligibility of resolution applicants under Section 29A of the IBC Code aimed to enhance transparency in the corporate insolvency resolution process (CIRP).

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.62	6.54	7.25	7.29	8.52
3-Yr	5.95	6.72	7.43	7.47	8.70
5-Yr	6.21	6.76	7.57	7.60	8.84
10-Yr	6.43	7.01	7.82	7.85	9.09

\* Weighted average yields



Global Indices	Aug 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	43975	-0.45	6.61	11.34
Nasdaq	21385	-0.30	19.28	27.71
FTSE 100	9130	0.37	6.72	11.77
DAX	24081	-0.34	2.48	35.88
Nikkei 225	NA	NA	NA	NA
Hang Seng	24907	0.19	8.92	45.74
KOSPI	3207	-0.10	24.43	23.89

Global 10 yr Sov. Yields (%)	Aug 11	1D Ago	3M Ago	1Y Ago
US	4.27	4.27	4.37	3.94
UK	4.564	4.60	4.56	3.94
German	2.6966	2.69	2.55	2.22
Japan	4.564	1.49	1.37	0.85

Commodity Prices	Aug 11	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.63	66.59	63.91	79.66
NYMEX Crude Oil (\$/bbl)	63.96	63.88	61.02	76.84
Gold (Rs / 10 gm)#	99957	100942	96416	69663

# ibjarates spot prices

Currencies Vs INR	Aug 11	1D Ago	M Ago	3M Ago
USD	87.58	87.62	85.85	85.64
GBP	117.96	117.66	116.29	113.40
Euro	102.17	102.05	100.29	96.29
100 Yen	59.35	59.48	58.45	58.92
Forex Reserve (\$ bn)*	688.87	698.19	699.74	686.06

\* 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

- BSE raises bar for SME to mainboard migration with higher profit, shareholder requirements.
- Lodha Developers received board’s approval for raising Rs 5,000 crore through the issuance of non-convertible debentures (NCDs).
- Speciale Invest has closed its third fund at Rs 600 crore to invest in expansion project.
- Shreeji Shipping Global Ltd announced a price band of Rs 240 to Rs 252 per share for its Rs 411-crore initial public offering (IPO).
- DLF Ltd, will pump in Rs 23,500 crore to complete residential projects already launched across Delhi-NCR and Mumbai.
- Larsen & Toubro Ltd (L&T) has won an ultra-mega contract from Adani Power Ltd valued at Rs 15,000 cr.
- ONGC will be investing over Rs 4,600 crore to drill 10 development wells, to set up two unmanned platforms
- Regaal Resources doubling production capacity at its Bihar plant with an investment of Rs 430 crore
- Indian Hotels Company Limited (IHCL), acquired 51% equity stake in two companies that operate 135 hotels under the Clarks Hotels and Resorts brand for Rs 204 crore
- Adani Defence to acquire 100% stake in Indamer Technics in MRO growth bid.
- BSNL to offer AI, 5G networking course, sign MoU with global tech companies.

## Global Equity

- Wall Street stocks ended lower on Monday as investors were caution ahead of the release of the US inflation data.
- 10-year US bond yield ended flat at 4.27% as investors remained on the side ways ahead of the release of the US inflation data.
- FTSE index ended higher on Monday due to stock specific buying.
- Asian markets were trading mixed at 8.30 AM.

## International

- China Total Vehicle Sales rose by 14.7% YoY in July 2025, compared to a 13.8% rise in June 2025.

## Upcoming market indicators

- Japan PPI, July (Aug 13)
- UK PPI, Jul (Aug 14)
- US Initial Jobless Claims, Aug/09 (Aug 14)
- US Industrial Production, Jul (Aug 15)
- UK Industrial Production, Jun (Aug 15)
- Japan GDP Growth Rate QoQ Prel Q2 (Aug 15)
- Japan Industrial Production Final, Jun (Aug 15)
- Eurozone Balance of Trade, Jun (Aug 18)
- India Unemployment Rate, Jul (Aug 18)
- US Building Permits Prel, Jul (Aug 19)
- US FOMC Minutes (Aug 20)
- Eurozone Inflation Rate Final, Jul (Aug 20)
- UK Inflation Rate, Jul (Aug 20)