

Broad Indices	Aug 12	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80236	-0.46	-2.66	0.74	22.51
Nifty 50	24487	-0.40	-1.75	0.58	21.56
BSE Mid cap	44810	-0.25	2.47	-5.08	33.05
Nifty Midcap 100	56325	-0.27	1.64	-1.75	30.75

Sectoral Indices	Aug 12	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53321	0.58	1.74	-6.65
BSE Bankex	61308	-0.83	-2.89	6.34
BSE CD	58461	-0.51	0.02	-0.78
BSE CG	66461	-0.76	1.82	-8.41
BSE FMCG	20264	-0.44	-2.27	-9.49
BSE Healthcare	43825	0.42	5.35	6.77
BSE IT	34036	0.28	-9.30	-14.89
BSE Metal	30745	0.36	2.07	-1.47
BSE Oil & Gas	26342	0.60	-1.86	-17.86
BSE Power	6644	0.23	-0.47	-19.33
BSE Realty	6866	-0.75	1.42	-15.13

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Maruti Suzuki	1.93	Bajaj Finance	-2.83
Tech Mahindra	1.90	Trent	-1.43
Hero Motocorp	1.82	HUL	-1.37
M&M	1.58	HDFC Bank	-1.29
NTPC	1.18	Nestle	-1.26

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 11	MF Inv Aug 8	DII Inv Aug 12
Buy	10237	13101	11514
Sell	11202	7011	7988
Net	-965	6090	3526
Net (YTD)	-106352	310404	444588

Policy rates	Aug 12	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 12	1W Ago	M Ago	3M Ago
Call (%)	5.05	4.90	5.00	5.85
10 Yr Gilt(%)^	6.48	6.33	6.30	6.38
TREP (%)	5.16	5.00	5.10	5.77
Short-term debt	Aug 12	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.25	6.18	6.20	6.90
6-month CPs (%)	6.39	6.36	6.35	7.16
3-month CDs (%)	5.82	5.73	5.75	6.64
6-month CDs (%)	6.10	5.99	6.00	6.80
182-day T-bill (%)^	5.51	5.46	5.52	5.90
364-day T-bill (%)^	5.54	5.47	5.56	5.86
Long-term debt	Aug 12	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.96	5.81	5.82	6.04
5-Y G-sec (%)	6.27	6.08	6.08	6.08
10-Y G-sec (%)	6.48	6.33	6.30	6.38

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended lower on Tuesday, owing to a decline in banking sector stocks and as investors were cautious ahead of July's domestic and US inflation data.
- The top losers were Bajaj Finance, Trent, HUL, HDFC Bank and Nestle, down 1.26-2.83%.
- The top gainers were Maruti Suzuki, Tech Mahindra, Hero MotoCorp, Mahindra & Mahindra and NTPC, up 1.18-1.93%.

Indian Debt

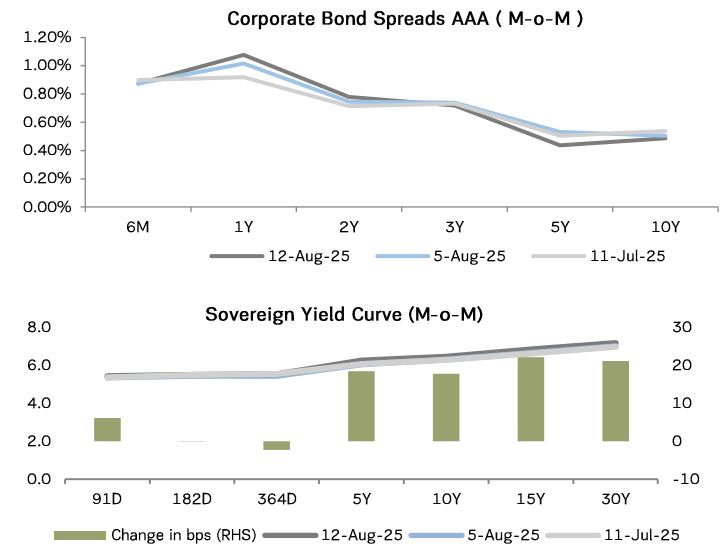
- The interbank call money rate ended higher at 5.05% on Tuesday compared to 5.00% on Monday.
- Government bond prices ended lower on Tuesday as weaker direct tax receipts and previously announced oil subsidies triggered fiscal concerns.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.49% on Tuesday compared to 6.44% on Monday.

Economy and Government

- India's retail inflation eased to an over 8-year low of 1.55% in July from 2.1% in June.
- Finance and corporate affairs minister Nirmala Sitharaman on Tuesday introduced a bill in the Lok Sabha for amendments to the Insolvency and Bankruptcy Code (IBC).
- Finance Minister Nirmala Sitharaman said the proposed raising of FDI limit in Indian insurance companies to 100% would bring more players into the market and generate employment opportunities.
- The finance ministry notified a corrigendum to the Income Tax Bill with regard to interest to be charged on short payment of advance tax by a taxpayer.
- The Union government approved an investment of Rs 8146.21 crore for the construction of a 700 MW Tato-II hydro-electric project in Shi Yomi District of Arunachal Pradesh.
- India's net direct tax collections declined 3.95% on year to Rs 6.64 trillion in the period from April 1 to August 11.
- The Indian Ports Bill, 2025 was passed by Lok Sabha.
- The Union Cabinet has approved an 11-kilometre extension to the first phase of the Lucknow Metro, featuring 12 new stations, at a cost of Rs 5,801 crore.
- The Union Cabinet approved four additional semiconductor manufacturing projects under the India Semiconductor Mission (ISM).
- The Ministry of Information and Broadcasting has established a task force to combat piracy.
- As per RBI data, In June 2025, Indian companies, including non-banking financial companies (NBFCs), filed proposals with the Reserve Bank of India (RBI) to raise \$3.48 billion through External Commercial Borrowings (ECBs).
- Sebi plans to simplify the offer document preparation process by introducing a template-based approach for relevant sections as it aims to reduce repetitive information and streamline disclosures.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.59	6.59	7.30	7.34	8.57
3-Yr	5.96	6.77	7.48	7.52	8.75
5-Yr	6.27	6.81	7.62	7.65	8.89
10-Yr	6.48	7.06	7.87	7.90	9.14

* Weighted average yields



Global Indices	Aug 12	1D % Chg	3M % Chg	1Y % Chg
DJIA	44459	1.10	4.83	12.96
Nasdaq	21682	1.39	15.89	29.21
FTSE 100	9148	0.20	6.31	11.42
DAX	24025	-0.23	1.94	35.53
Nikkei 225	42718	2.15	13.48	21.96
Hang Seng	24970	0.25	6.03	45.92
KOSPI	3190	-0.53	22.34	21.83

Global 10 yr Sov. Yields (%)	Aug 12	1D Ago	3M Ago	1Y Ago
US	4.29	4.27	4.45	3.90
UK	4.618	4.56	4.64	3.92
German	2.7431	2.70	2.64	2.23
Japan	1.508	4.56	1.47	0.85

Commodity Prices	Aug 12	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.12	66.63	64.96	82.3
NYMEX Crude Oil (\$/bbl)	63.17	63.96	61.95	80.06
Gold (Rs / 10 gm)#	99670	99957	93076	69890

ibjarates spot prices

Currencies Vs INR	Aug 12	1D Ago	M Ago	3M Ago
USD	87.67	87.58	85.85	85.64
GBP	117.79	117.96	116.29	113.40
Euro	101.81	102.17	100.29	96.29
100 Yen	59.13	59.35	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	1.55% (Jul-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

- Fractal Analytics filed for an initial public offering for \$560 million IPO.
- Medi Assist Healthcare Services block deal worth Rs 578 crore.
- Dashverse raises \$13 million from Peak XV Partners, Z47.
- Fairdeal Market, has raised \$3 million in a pre-series.
- Motilal Oswal Financial Services (MOFSL) invested Rs 400 crore in quick commerce unicorn Zetpo, acquiring 75.4 million compulsorily convertible preference shares (CCPS).
- SPJ True Realtyy will invest Rs 500 crore to develop a commercial project in Gurugram.
- HBL Engineering wins Rs 54-cr order from West Central Railway.
- Paytm Payment Services (PPSL) received in-principle approval from the Reserve Bank of India (RBI) to operate as an online payment aggregator under the Payment and Settlement Systems Act, 2007.

Global Equity

- Wall Street stocks closed higher on Tuesday as inflation reading for the July month boosted Fed rate cut hopes.
- 10-year US bond yield ended higher at 4.29% following the latest inflation figures.
- FTSE index rose on Tuesday buoyed by upbeat earnings reports of major companies and easing global trade tension after US extends its pause on higher tariffs for Chinese goods until November 10.
- Asian markets were trading higher at 8.30 AM.

International

- US annual inflation rate remained at 2.7% in in July 2025, the same as in June.
- The US budget deficit in July climbed 20% this fiscal year compared to the last despite the US taking in record income from President Donald Trump's tariffs.
- Eurozone ZEW Indicator of Economic Sentiment fell by 11 points from the prior month to 25.1 in August 2025.
- UK unemployment rate stood at 4.7% in the three months to June 2025, unchanged from the previous period as the market expected.
- Japan PPI rose 2.6% on year in July 2025, slowing from a 2.9% growth in the prior month.

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)