

Broad Indices	Aug 13	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80540	0.38	-0.75	2.01	22.59
Nifty 50	24619	0.54	0.17	1.99	21.68
BSE Mid cap	45060	0.56	2.86	-3.61	33.31
Nifty Midcap 100	56682	0.63	2.09	-0.35	30.96

Sectoral Indices	Aug 13	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	53948	1.18	3.94	-4.89
BSE Bankex	61484	0.29	-1.75	8.22
BSE CD	58579	0.20	0.09	-2.00
BSE CG	67133	1.01	1.79	-6.70
BSE FMCG	20258	-0.03	-1.24	-9.22
BSE Healthcare	44598	1.76	6.19	8.69
BSE IT	34048	0.04	-7.22	-14.64
BSE Metal	31121	1.22	4.31	1.12
BSE Oil & Gas	26335	-0.03	-0.95	-16.81
BSE Power	6645	0.01	0.55	-18.54
BSE Realty	6883	0.26	2.53	-14.25

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Apollo Hospital	7.90	IndusInd Bank	-1.23
Hindalco	5.01	Adani Ports	-0.82
Dr Reddys Labs	2.71	Titan Company	-0.57
Hero Motocorp	2.66	ITC	-0.54
Cipla	2.59	UltraTechCement	-0.39

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Aug 12	MF Inv Aug 11	DII Inv Aug 13
Buy	9976	11909	13465
Sell	12625	6437	7783
Net	-2649	5472	5682
Net (YTD)	-109000	315875	450270

Policy rates	Aug 13	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 13	1W Ago	M Ago	3M Ago
Call (%)	5.00	4.90	5.00	5.45
10 Yr Gilt(%)^	6.48	6.41	6.30	6.33
TREP (%)	5.12	5.00	5.10	5.00
Short-term debt	Aug 13	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.25	6.18	6.20	6.80
6-month CPs (%)	6.39	6.36	6.35	7.04
3-month CDs (%)	5.83	5.80	5.75	6.53
6-month CDs (%)	6.11	6.03	6.00	6.73
182-day T-bill (%)^	5.55	5.50	5.52	5.87
364-day T-bill (%)^	5.55	5.55	5.56	5.86
Long-term debt	Aug 13	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.98	5.90	5.82	5.99
5-Y G-sec (%)	6.29	6.15	6.08	6.02
10-Y G-sec (%)	6.48	6.41	6.30	6.33

^Weighted average yield

## Indian Equity

- Indian equity benchmarks closed higher on Wednesday, led by gains in auto and realty stocks as better-than-expected inflation data raised hopes of a rate cut by the Reserve Bank of India's Monetary Policy Committee. Markets also gained after the US inflation data raised expectations of a rate cut by the Federal Reserve (Fed).
- The top gainers were Apollo Hospital, Hindalco, Dr Reddy's Laboratories, Hero MotoCorp and Cipla, which were up 2.59-7.90%.
- The top losers were IndusInd Bank, Adani Ports, Titan Company, ITC and UltraTech Cement, which were down 0.39-1.23%.

## Indian Debt

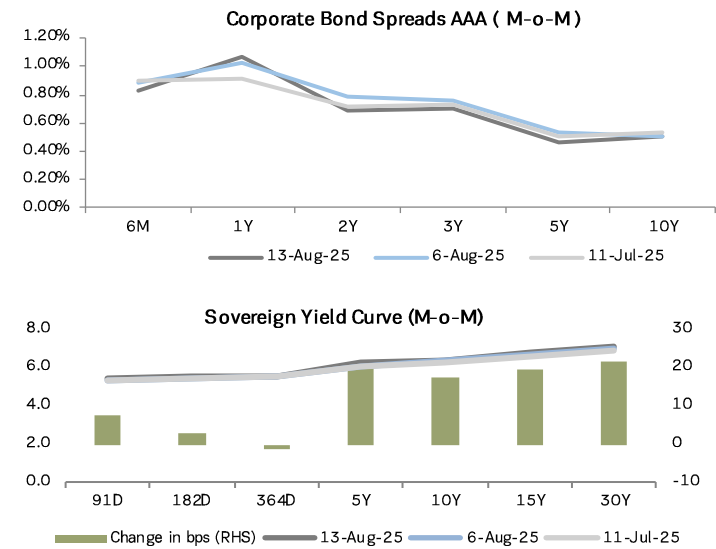
- The interbank call money rate ended lower at 5.00% on Wednesday compared to 5.05% on Tuesday.
- Government bond prices ended higher on Wednesday due to short covering at lower level.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.48% on Wednesday compared to 6.49% on Tuesday.

## Economy and Government

- Chief Economic Advisor V Anantha Nageswaran said that the momentum of the Indian economy has not slowed down after the United States imposed 50% tariff on India. He also said that it was too early to assess the impact of US tariffs on the Gross Domestic Product (GDP).
- The commerce and industry ministry has firmed up support schemes worth about Rs 25,000 crore under the Export Promotion Mission for a six-year period, amid continuing uncertainties from higher tariffs imposed by the US.
- The Reserve Bank of India's panel submitted its report on framework for Responsible and Ethical Enablement of Artificial Intelligence (FREE-AI) in the financial sector.
- SEBI proposed to include new market practises such as algorithmic trading and proprietary trading in its master regulations.
- The IBBI has proposed imposing a cap on the number of assignments that insolvency professionals (IPs) can handle across key roles, in a bid to improve efficiency and ensure equitable distribution of work.
- The Insolvency and Bankruptcy Board of India (IBBI) urged Committees of Creditors (CoCs) to thoroughly discuss the information memorandum (IM) — a key document containing complete details of a company undergoing insolvency.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.58	6.62	7.33	7.37	8.60
3-Yr	5.98	6.80	7.51	7.55	8.78
5-Yr	6.29	6.84	7.65	7.68	8.92
10-Yr	6.48	7.08	7.89	7.92	9.16

\* Weighted average yields



Global Indices	Aug 13	1D % Chg	3M % Chg	1Y % Chg
DJIA	44922	1.04	6.60	12.97
Nasdaq	21713	0.14	14.22	26.33
FTSE 100	9165	0.19	6.54	11.29
DAX	24186	0.67	2.31	35.78
Nikkei 225	43275	1.30	13.33	19.44
Hang Seng	25614	2.58	10.84	49.14
KOSPI	3224	1.08	23.61	23.00

Global 10 yr Sov. Yields (%)	Aug 13	1D Ago	3M Ago	1Y Ago
US	4.24	4.29	4.49	3.85
UK	4.593	4.62	4.67	3.89
German	2.6801	2.74	2.68	2.18
Japan	1.512	1.51	1.45	0.83

Commodity Prices	Aug 13	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.63	66.12	66.63	80.69
NYMEX Crude Oil (\$/bbl)	62.65	63.17	63.67	78.35
Gold (Rs / 10 gm)#	100097	99670	94344	70444

# ibjارات spot prices

Currencies Vs INR	Aug 13	1D Ago	M Ago	3M Ago
USD	87.70	87.67	85.85	84.89
GBP	118.48	117.79	116.29	112.03
Euro	102.48	101.81	100.29	94.30
100 Yen	59.33	59.13	58.45	57.40
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

- BSE Index Services, an arm of stock exchange BSE, announced the launch of defence index to track the performance of those stocks representing the theme.
- State Bank of India to issue Tier-II bonds to raise Rs 15,000 cr to replace maturing paper and fresh issuance.
- Fractal files filed its Draft Red Herring Prospectus (DRHP) with SEBI for Rs 4,900 crore IPO.
- Deeptech startup Comminent raises \$2 million from Transition VC.
- Refold AI raised \$6.5 million in seed funding.
- Arintra raised \$21 million in Series A funding.
- Antony Waste Handling has secured two orders worth Rs 3,200 crore.
- ACME Solar Holdings arm secures Rs 3,184 cr funding from REC, signs PPA with NHPC.
- Juniper Green Energy has secured Rs 1,739 crore from Indian Renewable Energy Development Agency Ltd (IREDA).
- Manipal Hospitals to set up Rs 700 cr 350-bed facility in Nagpur
- Reliance Infrastructure won Rs 526 crore as an arbitration award against Aravali Power Company Pvt. Ltd.

## Global Equity

- Wall Street stocks ended higher on Wednesday buoyed by rising hopes that the Federal Reserve may start its monetary policy easing cycle in September.
- 10-year US bond yield ended lower at 4.24% amid rising hopes for September Fed rate cut.
- FTSE index ended higher on Wednesday due to stock specific buying.
- Asian markets were trading lower at 8.30 AM.

## International

- The UK Residential Market Survey from RICS showed the house price balance declined to -13% in July 2025, down from -7% in each of the previous two months.

## Upcoming market indicators

- 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)