

Broad Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	80711	-0.01	-0.90	-1.81	22.34
Nifty 50	24741	0.03	-0.04	-1.61	21.73
BSE Mid cap	45460	-0.10	-0.48	-7.60	33.43
Nifty Midcap 100	57075	0.20	-2.11	-3.99	31.10

Sectoral Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58883	1.30	12.57	0.80
BSE Bankex	60501	0.03	-3.62	3.56
BSE CD	62399	0.10	8.24	-3.10
BSE CG	66853	-0.25	-5.85	-7.63
BSE FMCG	20739	-1.22	1.48	-10.85
BSE Healthcare	44254	0.02	2.80	1.52
BSE IT	34049	-1.25	-7.19	-21.37
BSE Metal	32165	0.71	4.47	2.03
BSE Oil & Gas	25842	-0.08	-3.84	-20.28
BSE Power	6542	0.04	-3.35	-19.22
BSE Realty	6782	-1.07	-11.97	-16.65

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Eicher Motors	2.42	ITC	-2.06
M&M	2.29	HCL Tech	-1.68
Maruti Suzuki	1.59	Cipla	-1.55
Power Grid Corp	1.26	TCS	-1.53
Dr Reddys Labs	1.21	Tech Mahindra	-1.50

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Sep 4	MF Inv Sep 2	DII Inv Sep 5
Buy	12336	9049	10031
Sell	13020	8375	8257
Net	-685	673	1774
Net (YTD)	-137540	357140	508086

Policy rates	Sep 5	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	Sep 5	1W Ago	M Ago	3M Ago
Call (%)	5.00	5.45	4.90	5.55
10 Yr Gilt(%)^	6.46	6.59	6.33	6.20
TREP (%)	5.10	5.35	5.00	5.67
Short-term debt	Sep 5	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.45	6.35	6.18	6.36
6-month CPs (%)	6.55	6.47	6.36	6.65
3-month CDs (%)	5.81	5.79	5.73	6.07
6-month CDs (%)	6.13	6.05	5.99	6.29
182-day T-bill (%)^	5.60	5.57	5.46	5.55
364-day T-bill (%)^	5.63	5.60	5.47	5.56
Long-term debt	Sep 5	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.07	6.06	5.81	5.71
5-Y G-sec (%)	6.22	6.35	6.08	5.84
10-Y G-sec (%)	6.46	6.59	6.33	6.20

^Weighted average yield

## Indian Equity

- Indian equity benchmarks closed flat on Friday as profit booking, US tariff concerns and persistent foreign outflows offset gains from positive global cues and hopes of rate cuts by the US Federal Reserve (Fed).
- The top gainers were, Eicher Motors, Mahindra & Mahindra, Maruti Suzuki, Power Grid Corporation and Dr Reddy's Labs, up 1.21-2.42%.
- The top losers were ITC, HCL Tech, Cipla, TCS and Tech Mahindra, down 1.50-2.06%.

## Indian Debt

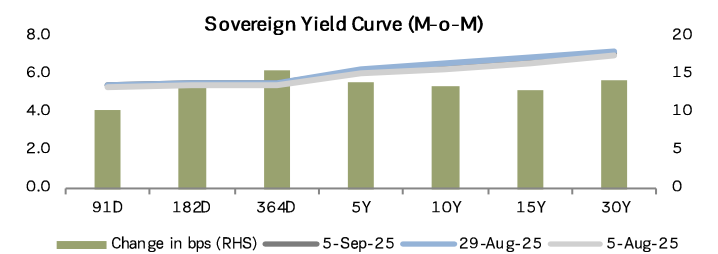
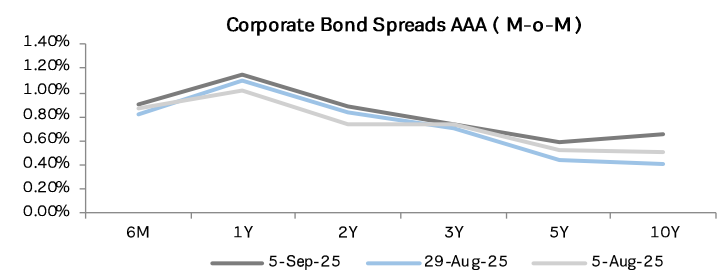
- The interbank call money rate ended lower at 5.00% on Friday compared to 5.50% on Thursday.
- Government bond prices rose on Friday after Union Finance Minister reaffirmed commitment to the fiscal deficit target.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.47% on Friday compared to 6.49% on Thursday.

## Economy and Government

- Chief Economic Adviser V Anantha Nageswaran said, given the expectation of benign inflation, there may be a shortfall in nominal GDP growth compared to the Budget estimate of 10.1% for the current financial year.
- India's forex reserves jumped by \$ 3.51 billion to \$ 694.23 billion for the week ended August 29.
- Finance Minister Nirmala Sitharaman said the recent Goods and Services Tax (GST) overhaul is not limited to rate reductions but is designed to make life easier for both businesses and consumers.
- The Andhra Pradesh cabinet approved a proposal to invite tender from insurance companies to extend universal health policy, which will offer healthcare services up to Rs 25 lakh.
- Bihar Chief Minister Nitish Kumar launched projects worth around Rs 1,159.84 crore in Patna district.
- The Securities and Exchange Board of India (Sebi) cautioned investors against fraudsters impersonating Sebi officials and using the regulator's letterhead, logo, and seal in fraudulent communications.
- Sebi issued a circular to streamline the process for surrendering KYC registration to ensure an orderly winding down of such agencies' operations while safeguarding investors' interests.
- The Securities and Exchange Board of India (Sebi) is expected to clear a wide range of reforms at its upcoming board meeting on September 12.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.64	6.77	7.48	7.52	8.75
3-Yr	6.07	6.89	7.60	7.64	8.87
5-Yr	6.22	6.94	7.75	7.78	9.02
10-Yr	6.46	7.23	8.04	8.07	9.31

\* Weighted average yields



Global Indices	Sep 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	45401	-0.48	7.28	11.40
Nasdaq	21700	-0.03	12.45	26.70
FTSE 100	9208	-0.09	4.51	11.73
DAX	23597	-0.73	-2.99	27.03
Nikkei 225	43019	1.03	14.55	17.35
Hang Seng	25418	1.43	6.32	45.71
KOSPI	3205	0.13	13.98	24.45

Global 10 yr Sov. Yields (%)	Sep 5	1D Ago	3M Ago	1Y Ago
US	4.10	4.17	4.40	3.73
UK	4.66	4.71	4.59	3.92
German	2.66	2.72	2.59	2.21
Japan	1.57	1.60	1.47	0.88

Commodity Prices	Sep 5	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.50	66.99	65.34	72.69
NYMEX Crude Oil (\$/bbl)	61.87	63.48	63.37	69.15
Gold (Rs / 10 gm)#	106338	105945	98163	71875

# ibjrarates spot prices

Currencies Vs INR	Sep 5	1D Ago	M Ago	3M Ago
USD	88.32	88.16	87.79	85.77
GBP	118.92	118.43	116.62	116.27
Euro	103.08	102.75	101.42	97.89
100 Yen	59.59	59.49	59.68	59.93
Forex Reserve (\$ bn)*	694.23	690.72	698.19	692.72

\* Data pertains to Aug 29 and Aug 22 respectively Source: CRISIL

Key Macro Indicators	
CPI	1.55% (Jul-2025)
WPI	-0.58% (Jul-2025)
IIP	3.5% (Jul -2025)
GDP Growth Rate	7.8% (Apr-Jun FY26)

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Capital Market

- Chartered Speed Ltd has filed preliminary papers with markets regulator Sebi to raise Rs 855 crore through an initial public offering (IPO).
- Knack Packaging filed draft papers with Sebi to raise Rs 475 cr through an Initial Public Offering (IPO) to support its expansion plans.
- Edtech unicorn PhysicsWallah has filed updated draft papers with Sebi to raise Rs 3,820 crore through an initial public offering (IPO) for expansion and growth initiatives.
- Karbonsteel Engineering raised close to Rs 17 crore from anchor investors ahead of its upcoming initial public offering (IPO).
- Amber Enterprises plans to raise a total of Rs 1,200 crore from private equity investors through issuance of equity shares and compulsorily convertible preference shares in its subsidiary ILJIN Electronics.

Global Equity

- Wall Street stocks closed lower on Friday dragged down by banking stocks as sharp weakness in August job growth fueled economic worries.
- 10-year US bond yield ended lower at 4.10% due to weak nonfarm payroll numbers for August month.
- FTSE index closed lower on Friday weighed down by energy and banking stocks as investors digested domestic and US economic data.
- Asian markets were trading higher at 8.30 AM.

International

- US nonfarm payrolls rose by 22,000 in August 2025, compared to an upwardly revised 79,000 in July 2025.
- The Eurozone economy expanded 1.5% year-on-year in the second quarter of 2025, compared to an upwardly revised 1.6% in Q1.
- UK Halifax House Price Index rose 2.2% year-on-year in August 2025, compared to 2.5% in July 2025.
- The Japanese economy grew by 2.2% on an annualized basis in Q2 2025 compared to a downwardly revised 0.3% increase in Q1.

Upcoming market indicators

- US Consumer Inflation Expectations, Aug (Sep 8)
- US PPI, Aug (Sep 10)
- US Monthly Budget Statement, Aug (Sep 10)
- China PPI, Aug (Sep 10)
- China Inflation Rate, Aug (Sep 10)
- US Inflation Rate, Aug (Sep 11)
- US Initial Jobless Claims, Sep/06 (Sep 11)
- US CPI, Aug (Sep 11)
- Eurozone Industrial Production, Jun (Sep 11)
- Eurozone ECB Interest Rate Decision (Sep 11)
- UK PPI, Jul (Sep 11)
- UK Industrial Production, Jul (Sep 11)
- Japan PPI, Aug (Sep 11)