

Broad Indices	Sep 10	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81425	0.40	-1.17	-0.61	22.53
Nifty 50	24973	0.42	-0.52	-0.27	21.94
BSE Mid cap	46080	0.84	-1.09	-5.23	33.88
Nifty Midcap 100	58000	0.93	-2.82	-1.76	31.61

Sectoral Indices	Sep 10	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59905	-1.21	12.38	3.80
BSE Bankex	60999	0.68	-4.55	5.00
BSE CD	61787	-0.22	5.28	-4.90
BSE CG	68366	1.88	-4.33	-4.46
BSE FMCG	20902	0.58	1.33	-11.28
BSE Healthcare	44674	0.56	2.26	1.91
BSE IT	35570	2.48	-5.90	-17.72
BSE Metal	32406	0.25	2.91	4.09
BSE Oil & Gas	25934	0.38	-5.36	-16.51
BSE Power	6591	0.67	-5.63	-18.55
BSE Realty	6868	1.15	-13.76	-15.36

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Bharat Electronics	4.33	M&M	-2.49
Wipro	2.65	Maruti Suzuki	-1.67
HCL Tech	2.58	Bajaj Auto	-1.48
HDFC Life	2.17	Hero Motocorp	-1.35
Bajaj Finance	2.06	Tata Motors	-0.90

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Sep 9	MF Inv Sep 8	DII Inv Sep 10
Buy	22644	723	15633
Sell	22073	1027	10669
Net	571	-304	4964
Net (YTD)	-137145	362026	516113

Policy rates	Sep 10	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.50	5.50	5.50
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.00	4.00	4.00	4.00
Overnight rates	Sep 10	1W Ago	M Ago	3M Ago
Call (%)	5.00	5.35	5.00	5.25
10 Yr Gilt(%)^	6.48	6.54	6.40	6.29
TREP (%)	5.25	5.32	5.28	5.19
Short-term debt	Sep 10	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.58	6.45	6.18	6.15
6-month CPs (%)	6.70	6.60	6.36	6.39
3-month CDs (%)	5.88	5.83	5.78	5.73
6-month CDs (%)	6.18	6.10	6.03	6.06
182-day T-bill (%)^	5.61	5.59	5.50	5.41
364-day T-bill (%)^	5.64	5.62	5.54	5.42
Long-term debt	Sep 10	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.05	6.14	5.90	5.76
5-Y G-sec (%)	6.25	6.29	6.15	5.95
10-Y G-sec (%)	6.48	6.54	6.40	6.29

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Wednesday, boosted by gains in IT and banking stocks driven by optimism regarding a possible India-US trade deal and positive global cues.
- The top gainers were Bharat Electronics Ltd, Wipro, HCL Technologies, HDFC Life Insurance and Bajaj Finance, up 2.06-4.33%.
- The top losers were Mahindra & Mahindra, Maruti Suzuki, Bajaj Auto, Hero Motocorp and Tata Motors, down 0.90-2.49%.

Indian Debt

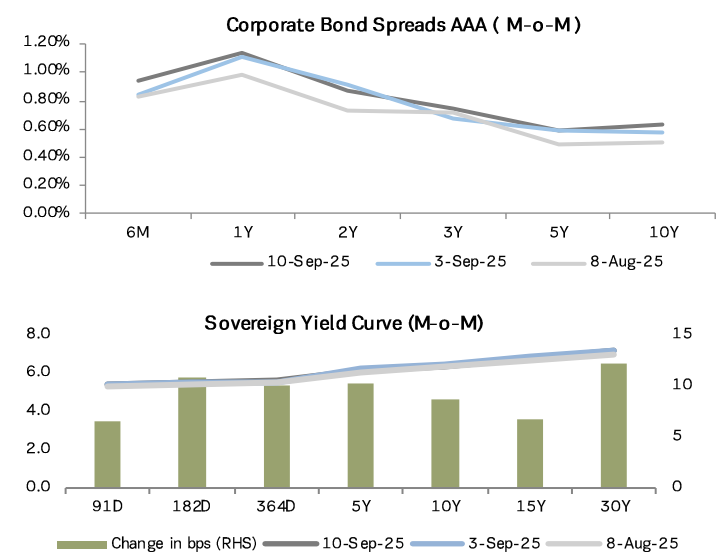
- The interbank call money rate ended flat at 5.00% on Wednesday.
- Government bond prices rose marginally on Wednesday as traders were cautious ahead of the India and US inflation data report due on Friday.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.48% on Wednesday compared to 6.49% on Tuesday.

Economy and Government

- Fitch raised India's fiscal 2025-26 (FY26) GDP (gross domestic product) forecast to 6.9% from 6.5%.
- The Union Cabinet approved two major infrastructure projects worth Rs 7,616 crore aimed at boosting connectivity and economic activity across Bihar and neighbouring states.
- The Ministry of Statistics and Programme Implementation (MoSPI) has invited feedback from stakeholders on draft National Industrial Classification (NIC) - 2025.
- The Reserve Bank of India approved Yes Bank's proposed amendments to its Articles of Association, facilitating the appointment of nominee directors.
- The Securities and Exchange Board of India (Sebi) to let Category I and II alternative investment funds (AIFs) run a dedicated "co-investment" (CIV) scheme for accredited investors, doing away with an earlier requirement of a separate portfolio-manager licence.
- SEBI said newer rules easing regulatory requirements for foreign investors who invest exclusively in the country's government bonds will come into effect from February 8, 2026.
- The National Payments Corporation of India (NPCI) plans to allow users to make payments of up to Rs 5 lakh per transaction in select categories, while the cumulative daily limit has been revised to as high as Rs 10 lakh in some cases.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.62	6.77	7.48	7.52	8.75
3-Yr	6.05	6.89	7.60	7.64	8.87
5-Yr	6.25	6.94	7.75	7.78	9.02
10-Yr	6.48	7.23	8.04	8.07	9.31

* Weighted average yields



Global Indices	Sep 10	1D % Chg	3M % Chg	1Y % Chg
DJIA	45491	-0.48	6.12	11.67
Nasdaq	21886	0.03	11.01	28.55
FTSE 100	9225	-0.19	4.21	12.42
DAX	23633	-0.36	-1.48	29.38
Nikkei 225	43838	0.87	14.72	21.24
Hang Seng	26200	1.01	8.43	52.03
KOSPI	3315	1.67	15.41	31.35

Global 10 yr Sov. Yields (%)	Sep 10	1D Ago	3M Ago	1Y Ago
US	4.04	4.08	4.47	3.65
UK	4.63	4.62	4.55	3.82
German	2.65	2.66	2.53	2.15
Japan	1.57	1.59	1.48	0.87

Commodity Prices	Sep 10	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	67.49	66.39	66.87	69.19
NYMEX Crude Oil (\$/bbl)	63.67	62.63	64.98	65.75
Gold (Rs / 10 gm)#	109635	109475	96359	71590

ibjirates spot prices

Currencies Vs INR	Sep 10	1D Ago	M Ago	3M Ago
USD	88.13	88.14	87.62	85.59
GBP	119.25	119.64	117.66	115.62
Euro	103.20	103.77	102.05	97.61
100 Yen	59.75	59.96	59.48	59.24
Forex Reserve (\$ bn)*	694.23	690.72	688.87	691.49

* 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

- Sterling and Wilson Renewable Energy received a letter of intent (LoI) for a Rs 415 crore solar power project in Rajasthan.
- MTAR Technologies received orders worth Rs 386.06 crore in the Clean Energy Sector.
- Trident invested about Rs 250 crore in Trident Global Corp Ltd and allotted 22.3 million equity shares, representing 30.42% stake in the company.
- Thermax invested Rs 115 crore in its wholly owned subsidiary, which will invest in its step-down subsidiary.
- Pace Digitek received a nod from the Securities and Exchange Board of India (SEBI) to raise a Rs 900 crore from the initial public offer (IPO) to boost battery energy storage systems (BESS) portfolio.
- Tern Group raised \$24 million in Series A funding led by UK-based Notion Capital, with participation from RTP Global, LocalGlobe, EQ2 Ventures and Leo Capital.
- Ember raised \$3.2 million in a funding round led by high net worth individuals (HNIs), family offices, and existing investors.

Global Equity

- Wall Street stocks closed mixed on Wednesday with Nasdaq gaining marginally boosted by optimism in AI stocks ahead of the inflation data while Dow Jones declined due to loss in consumer discretionary and consumer staples stocks.
- 10-year US bond yield ended lower at 4.04% as weak PPI data boosted hopes for Fed rate cut.
- FTSE index closed lower on Wednesday weighed down by consumer staples and industrial stocks as investors digested corporate earnings.
- Asian markets were trading higher at 8.30 AM.

International

- US Producer Prices increased 2.6% in August 2025 compared to upwardly revised 3.1% in July 2025.
- Japan Producer Prices rose 2.7% in August 2025 compared to a marginally revised 2.5% increase in July 2025.

Upcoming market indicators

- 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)
- UK GDP, Jul (Sep 12)
- Japan Industrial Production Final, Jul (Sep 12)
- India Inflation Rate, Aug (Sep 12)
- India Foreign Exchange Reserves, Sep/05 (Sep 12)