

Broad Indices	Sep 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81549	0.15	-1.17	0.03	22.57
Nifty 50	25006	0.13	-0.54	0.35	21.97
BSE Mid cap	46145	0.14	-0.83	-4.60	33.93
Nifty Midcap 100	58044	0.08	-2.26	-1.52	31.63

Sectoral Indices	Sep 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59716	-0.32	11.81	4.70
BSE Bankex	61215	0.35	-3.95	5.81
BSE CD	61757	-0.05	5.43	-5.11
BSE CG	68488	0.18	-3.76	-4.13
BSE FMCG	20933	0.15	2.06	-11.28
BSE Healthcare	44802	0.29	1.80	2.27
BSE IT	35362	-0.58	-7.60	-17.97
BSE Metal	32523	0.36	3.21	5.89
BSE Oil & Gas	26242	1.19	-5.96	-13.57
BSE Power	6661	1.06	-3.86	-17.48
BSE Realty	6867	-0.02	-13.90	-14.33

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Shriram Finance	2.52	Infosys	-1.49
Adani Enterpris	2.43	Bajaj Auto	-1.41
NTPC	1.66	Eicher Motors	-1.20
Axis Bank	1.62	SBI Life Insura	-1.06
Power Grid Corp	1.36	Titan Company	-1.01

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Sep 10	MF Inv Sep 9	DII Inv Sep 11
Buy	17141	4759	14167
Sell	12647	5071	9904
Net	4494	-312	4264
Net (YTD)	-132651	362495	520377

Policy rates	Sep 11	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 11	1W Ago	M Ago	3M Ago
Call (%)	5.00	5.50	5.00	5.00
10 Yr Gilt(%)^	6.47	6.50	6.43	6.30
TREP (%)	5.12	5.73	5.20	5.19
Short-term debt	Sep 11	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.59	6.45	6.28	6.21
6-month CPs (%)	6.70	6.55	6.39	6.55
3-month CDs (%)	5.87	5.81	5.80	5.77
6-month CDs (%)	6.14	6.13	6.04	6.17
182-day T-bill (%)^	5.61	5.60	5.51	5.41
364-day T-bill (%)^	5.64	5.63	5.51	5.51
Long-term debt	Sep 11	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.05	6.11	5.95	5.79
5-Y G-sec (%)	6.27	6.27	6.21	5.98
10-Y G-sec (%)	6.47	6.50	6.43	6.30

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed slightly higher on Thursday, buoyed by optimism over easing trade frictions with the US and the recent GST rate cut announcement.
- The top gainers were Shriram Finance, Adani Enterprises, NTPC, Axis Bank and Power Grid Corporation, up 1.36-2.52%.
- The top losers were Infosys, Bajaj Auto, Eicher Motors, SBI Life Insurance and Titan Company, down 1.01-1.49%.

Indian Debt

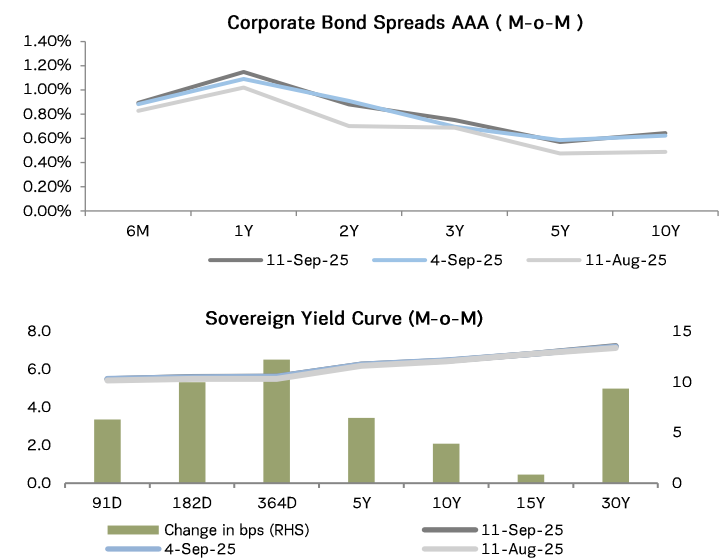
- The interbank call money rate ended flat at 5.00% on Thursday.
- Government bond prices rose marginally on Thursday as traders awaited India and US inflation data for cues on future rate moves and borrowing plans.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.47% on Thursday compared to 6.48% on Wednesday.

Economy and Government

- India and Mauritius inked seven memorandum of understanding (MoUs) across different sectors.
- India and the Asian Development Bank (ADB) have signed a \$126.42-million loan agreement to promote rural development through sustainable tourism in the Tehri Lake region of Uttarakhand.
- The Maharashtra government secured investment deals worth Rs 1,08,599 crore. These MoUs involve sectors like IT, food processing and logistics.
- Union Minister for Environment, Forest and Climate Change Bhupender Yadav said India will require over \$10 trillion in investments by 2070 to achieve its net zero ambitions, and building confidence in green investments will be critical.
- Prime Minister Narendra Modi said that the government and the automobile industry should work together to achieve self-reliance as India moves towards the 'Viksit Bharat' goal.
- The Securities and Exchange Board of India (SEBI) plans to float a consultation paper within a month to consider ending weekly futures and options (F&O) contracts.

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	6.27	6.94	7.75	7.78	9.02
10-Yr	6.47	7.23	8.04	8.07	9.31

* Weighted average yields



Global Indices	Sep 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	46108	1.36	7.56	12.84
Nasdaq	22043	0.72	12.37	26.72
FTSE 100	9298	0.78	4.89	13.47
DAX	23704	0.30	-1.02	29.31
Nikkei 225	44373	1.22	15.49	24.57
Hang Seng	26086	-0.43	7.06	52.47
KOSPI	3344	0.90	15.04	33.06

Global 10 yr Sov. Yields (%)	Sep 11	1D Ago	3M Ago	1Y Ago
US	4.01	4.04	4.41	3.65
UK	4.595	4.63	4.55	3.76
German	1.575	2.65	2.54	2.09
Japan	1.575	1.57	1.46	0.87

Commodity Prices	Sep 11	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	66.37	67.49	69.77	70.61
NYMEX Crude Oil (\$/bbl)	62.37	63.67	68.15	67.31
Gold (Rs / 10 gm)#	109097	109635	96235	71994

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Currencies Vs INR	Sep 11	1D Ago	M Ago	3M Ago
USD	88.26	88.13	87.58	85.45
GBP	119.33	119.25	117.96	115.23
Euro	103.19	103.20	102.17	97.56
100 Yen	59.76	59.75	59.35	58.89
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

- Indian Renewable Energy Development Agency (IREDA) raised Rs 453 crore through issuance of perpetual bonds.
- Core Integra Consulting Services filed its Draft Red Herring Prospectus (DRHP) with the Securities and Exchange Board of India (Sebi) for an upcoming Initial Public Offering (IPO).
- NBCC has partnered with RIICO to develop infrastructure projects worth Rs. 3,700 crores in Jaipur, including the Rajasthan Mandapam near the airport.
- Dr Reddy's Laboratories announced the completion of a definitive transaction with Johnson & Johnson to acquire Stugeron brand across the EMEA regions, with India and Vietnam as key markets.
- Tata Consultancy Services (TCS) announced the launch of chiplet-based system engineering services to accelerate semiconductor innovation.
- JBM Ecolife Mobility secured a \$100 million long-term capital investment from International Financial Corporation (IFC).
- The National High Speed Rail Corporation Limited (NHSRCL) signed an agreement with Larsen & Toubro (L&T) for the design, supply, construction, testing and commissioning of track works for the Mumbai-Ahmedabad Bullet Train project.

Global Equity

- Wall Street stocks advanced on Thursday as latest inflation and labor market data for August month fueled Fed rate cut expectations.
- 10-year US bond yield ended lower at 4.01% following August inflation numbers.
- FTSE index ended higher on Thursday boosted by industrial and banking stocks following upbeat earnings reports.
- Asian markets were trading higher at 8.30 AM.

International

- US annual inflation rate accelerated to 2.9% in August 2025, compared to 2.7% in July 2025.
- US annual core consumer price inflation remained stable at 3.1% in August 2025 unchanged compared to July 2025.
- US Initial jobless claims surged by 27,000 from the previous week to 263,000 on the first week of September compared to 236, 000.
- The European Central Bank kept its three key interest rates unchanged, with the deposit facility at 2.00%, the main refinancing rate at 2.15%, and the marginal lending rate at 2.40%.
- China vehicle sales increased 16.4% to 2.857 million units in August 2025 compared to a 14.7% growth in July 2025.

Upcoming market indicators

- Eurozone Balance of Trade, Jul (Sep 15)
- China Industrial Production, Aug (Sep 15)
- China FDI (YTD) Aug (Sep 15)
- China Unemployment Rate, Aug (Sep 15)
- US Manufacturing/ industrial Production, Aug (Sep 16)
- US Retail sales, August (Sep 16)
- US Industrial Production, Aug (Sep 16)