

Broad Indices	Feb 3	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83739	2.54	-0.29	8.49	23.05
Nifty 50	25728	2.55	-0.14	10.13	22.35
BSE Mid cap	45842	2.57	-3.16	7.86	NA
Nifty Midcap 100	59307	2.84	-1.63	11.92	32.42

Sectoral Indices	Feb 3	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60988	2.88	1.73	16.49
BSE Bankex	67425	2.32	3.21	20.73
BSE CD	56639	2.60	-6.27	-5.16
BSE CG	68093	3.71	-3.45	13.68
BSE FMCG	18646	0.73	-9.70	-10.42
BSE Healthcare	42253	2.83	-6.18	0.85
BSE IT	37150	1.49	6.23	-10.75
BSE Metal	39141	2.85	11.02	41.90
BSE Oil & Gas	28353	1.77	-1.95	16.37
BSE Power	6654	4.14	-3.91	7.84
BSE Realty	6354	4.79	-15.57	-13.93

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Adani Enterprises	10.58	Tech Mahindra	-0.66
Adani Ports	9.19	BEL	-0.16
Jio Financial	8.15	SBI Life	-0.08
Bajaj Finance	6.67	Nestle India	-0.07
InterGlobe	5.57	NA	NA

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Feb 2	MF Inv Feb 1	DII Inv Feb 3
Buy	15885	10800	28206
Sell	17002	11841	27192
Net	-1117	-1041	1014
Net (YTD)	-32909	41314	65107

Policy rates	Feb 3	1W Ago	M Ago	3M Ago
Repo (%)	5.25	5.25	5.25	5.50
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	3.00	3.00	3.00	4.00
Overnight rates	Feb 3	1W Ago	M Ago	3M Ago
Call (%)	4.40	5.40	5.35	5.00
10 Yr Gilt(%) [^]	6.73	6.71	6.61	6.53
TREP (%)	4.50	4.55	5.45	5.00
Short-term debt	Feb 3	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.60	7.55	6.65	6.52
6-month CPs (%)	7.70	7.58	6.95	6.77
3-month CDs (%)	7.00	7.08	6.23	6.00
6-month CDs (%)	7.10	7.08	6.50	6.24
182-day T-bill (%) [^]	5.61	5.55	5.42	5.56
364-day T-bill (%) [^]	5.65	5.70	5.51	5.56
Long-term debt	Feb 3	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.99	5.97	5.87	5.91
5-Y G-sec (%)	6.50	6.44	6.34	6.17
10-Y G-sec (%)	6.73	6.71	6.61	6.53

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Tuesday, after India and the US finalised a trade agreement, which concluded months of negotiations.
- The top gainers were Adani Enterprises, Adani Ports and Special Economic Zone, Jio Financial Services, Bajaj Finance, and InterGlobe Aviation, up 5.57-10.58%.
- The top losers were Tech Mahindra, Bharat Electronics, SBI Life Insurance Company, and Nestle India, down 0.07-0.66%.

Indian Debt

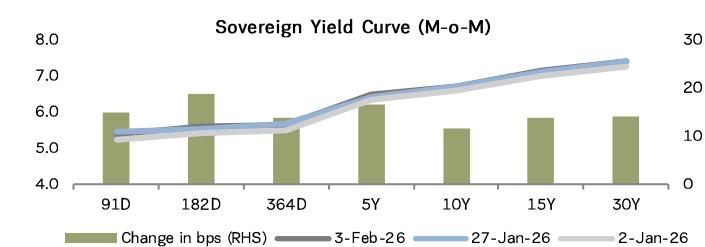
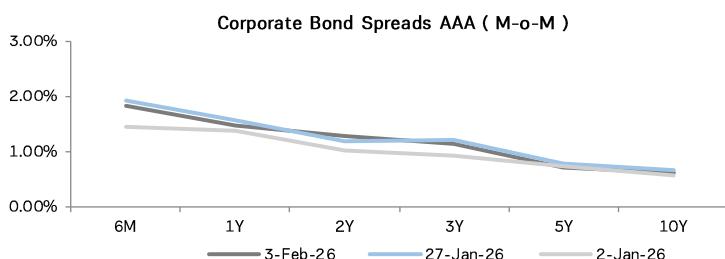
- The interbank call-money rate ended flat at 4.40% on Tuesday.
- Government bond prices rose on Tuesday due to fresh buying after the newly signed US-India trade pact amid persistent supply concerns following borrowing projections.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.73% on Tuesday compared to 6.76% on Monday.

Economy and Government

- Moody's Ratings said the reduction of the US tariff rate on most Indian goods is credit positive for labour-intensive sectors such as gems, jewellery, textiles and apparel, which are the top export sectors.
- The country's chief economic adviser said India's economy could grow even faster than the government's earlier forecast after the US substantially lowered tariffs on Indian goods.
- Union Home Minister Amit Shah said that the India-US trade agreement will boost MSMEs, global competitiveness among small industries, and increase employment opportunities.
- Prime Minister (PM) Narendra Modi said the India-US trade deal a "big decision", and said it will benefit everyone in the country, asserting that his government always works in favour of the nation.
- Finance minister Nirmala Sitharaman said Indian exporters stand to gain from reduction in US tariffs and trade agreement with the EU, which will also help attract investment.
- Union Commerce and Industry Minister Piyush Goyal said India has protected its sensitive agriculture and dairy sectors in the just-concluded trade deal with the US.
- The Indian government has initiated the National Green Hydrogen Mission to drive the production of green hydrogen, with a strategic objective to position India as a leading global center for this clean energy source.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.68	7.14	7.88	7.93	9.16
3-Yr	5.99	7.26	8.00	8.05	9.28
5-Yr	6.50	7.30	8.14	8.19	9.42
10-Yr	6.73	7.46	8.30	8.35	9.58

* Weighted average yields



Global Indices	Feb 3	1D % Chg	3M % Chg	1Y % Chg
DJIA	49241	-0.34	4.02	10.85
Nasdaq	23255	-1.43	-2.43	19.92
FTSE 100	10315	-0.26	6.32	20.17
DAX	24781	-0.07	2.69	15.65
Nikkei 225	54721	3.92	4.41	42.06
Hang Seng	26835	0.22	2.59	32.73
KOSPI	5288	6.84	25.25	115.49

Global 10 yr Sov. Yields (%)	Feb 3	1D Ago	3M Ago	1Y Ago
US	4.28	4.29	4.13	4.54
UK	4.52	4.31	4.43	4.49
German	2.8889	2.87	2.66	2.39
Japan	2.258	2.24	1.65	1.25

Commodity Prices	Feb 3	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	67.33	66.3	64.89	75.96
NYMEX Crude Oil (\$/bbl)	63.21	62.14	61.05	73.16
Gold (Rs / 10 gm) #	151529	148746	120777	82704

ibjarates spot prices

Currencies Vs INR	Feb 3	1D Ago	M Ago	3M Ago
USD	90.45	91.64	90.12	88.79
GBP	123.89	125.24	121.35	116.70
Euro	106.86	108.57	105.84	102.43
100 Yen	58.19	59.20	57.42	57.59
Forex Reserve (\$ bn)*	709.41	701.36	696.61	695.36

* Data pertains to Jan 23 and Jan 16 respectively Source: CRISIL

Capital Market

- Tesla India launched various initiatives, including an EMI scheme, to lift weak sales in the country.
- Adani Group and Italian major Leonardo announced a strategic partnership to establish an integrated helicopter manufacturing ecosystem in India.

Global Equity

- Wall Street stocks ended declined on Tuesday dragged down by losses in technology stocks amid worries over AI ahead of Q4 earnings.
- 10-year US bond yield ended lower at 4.28% amid caution ahead of economic data.
- FTSE index closed lower on Tuesday due to fall in technology stocks amid AI disruption concerns ahead of the Bank of England's policy meeting
- Asian markets were trading mixed at 8.30 AM.

International

- China RatingDog General Services PMI increased to 52.3 in January 2026 compared to 52.0 in December 2025 while the RatingDog China General Composite PMI rose to 51.6 from 51.3.
- Japan Monetary Base decreased by 9.50% in January from -9.80% in December of 2025.
- Japan S&P Global Composite PMI rose to 53.1 in January 2026 compared to 51.1 in December 2025 while the S&P Global Services PMI edged up to 53.7 from 51.6.

Upcoming market indicators

- US JOLTs Job Openings, Dec (Feb 3)
- Eurozone ECB Consumer Inflation Expectations, Dec (Feb 3)
- US ISM Services PMI Jan (Feb 4)
- Eurozone HCOB Construction/services PMI Final, Jan (Feb 4)
- Eurozone PPI, Dec (Feb 4)
- US Initial Jobless Claims Jan/31 (Feb 5)
- Eurozone HCOB Construction PMI, Jan (Feb 5)

Key Macro Indicators	Feb 3	1D Ago	M Ago	3M Ago
CPI	1.33% (Dec-2025)			
WPI	0.83% (Dec-2025)			
IIP	7.8% (Dec-2025)			
GDP Growth Rate	8.2% (Jul-Sep FY'26)			

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