

Broad Indices	Feb 6	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83580	0.32	0.32	7.07	23.15
Nifty 50	25694	0.20	0.72	8.86	22.26
BSE Mid cap	45911	-0.03	-1.58	6.78	NA
Nifty Midcap 100	59503	-0.02	0.06	11.22	32.96

Sectoral Indices	Feb 6	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61185	-0.26	2.92	16.90
BSE Bankex	67551	0.02	4.22	18.39
BSE CD	57720	0.44	-4.17	-1.06
BSE CG	67752	0.41	-2.53	10.12
BSE FMCG	19003	2.05	-7.09	-6.41
BSE Healthcare	41947	-0.50	-5.75	-2.78
BSE IT	34352	-1.41	-0.60	-18.98
BSE Metal	39355	0.34	15.55	39.38
BSE Oil & Gas	29159	0.40	1.84	15.52
BSE Power	6813	0.64	1.34	8.32
BSE Realty	6433	0.63	-12.50	-9.78

Nifty			
Top Out performers	% Change	Top Under performers	% Change
ITC	5.21	HDFC Life	-2.40
Kotak Bank	3.33	Tech Mahindra	-1.83
Hindu Unilever	2.83	TCS	-1.71
Bajaj Finance	1.79	SBI Life	-1.54
Bharti Airtel	1.54	Tata Motors	-1.40

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Feb 5	MF Inv Feb 1	DII Inv Feb 6
Buy	15802	10800	13216
Sell	17115	11841	14481
Net	-1313	-1041	-1265
Net (YTD)	-25569	41314	65222

Policy rates	Feb 6	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 6	1W Ago	M Ago	3M Ago
Call (%)	4.45	4.80	4.80	4.95
10 Yr Gilt(%) [^]	6.74	6.70	6.62	6.51
TREP (%)	4.10	4.66	4.82	4.80
Short-term debt	Feb 6	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.50	7.75	6.73	6.56
6-month CPs (%)	7.57	7.73	7.00	6.72
3-month CDs (%)	7.00	7.25	6.36	6.02
6-month CDs (%)	7.05	7.25	6.62	6.24
182-day T-bill (%) [^]	5.55	5.62	5.45	5.58
364-day T-bill (%) [^]	5.65	5.71	5.53	5.58
Long-term debt	Feb 6	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.01	6.02	5.90	5.90
5-Y G-sec (%)	6.52	6.36	6.35	6.15
10-Y G-sec (%)	6.74	6.70	6.62	6.51

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Friday, boosted by gains in FMCG, metal and realty stocks after the Reserve Bank of India unanimously kept the repo rate unchanged at 5.25% and maintained a neutral stance.
- The top gainers were ITC, Kotak Bank, Hindustan Unilever, Bajaj Finance and Bharti Airtel, up 1.54-5.21%.
- The top losers were HDFC Life, Tech Mahindra, TCS, SBI Life Insurance and TMPV, down 1.40-2.40%.

Indian Debt

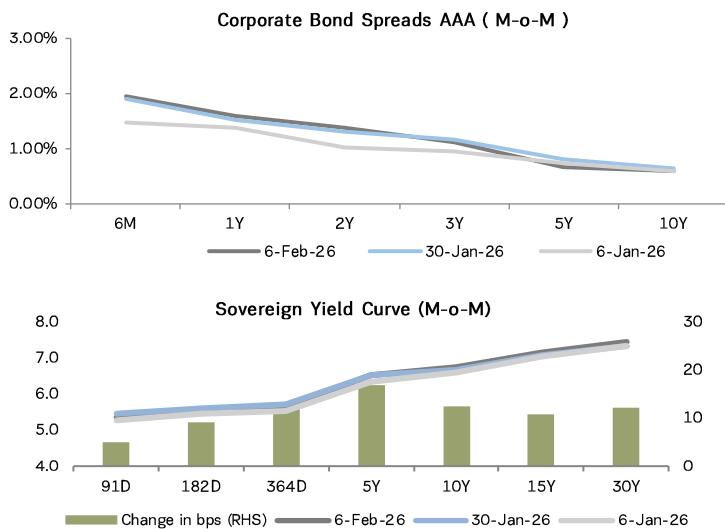
- The interbank call-money rate ended lower at 4.45% on Friday compared to 5.05% on Thursday.
- Government bond prices fell on Friday after the RBI refrained from announcing fresh liquidity support amid concerns over record bond supply next fiscal year.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.74% on Friday compared to 6.65% on Thursday.

Economy and Government

- The Reserve Bank of India's (RBI) Monetary Policy Committee (MPC) voted unanimously to keep the repo rate unchanged at 5.25%.
- Accordingly, the standing deposit facility rate remains at 5.00%, while the marginal standing facility rate and the bank rate remain unchanged at 5.50%. The MPC decided to maintain a neutral stance, supported by low inflation rate and a favourable growth outlook.
- The RBI projected India's real gross domestic product (GDP) growth for fiscal 2026 at 7.4%. Growth projections for the first and second quarters of fiscal 2027 have been revised upwards to 6.9% and 7.0%, respectively.
- The RBI revised its inflation projection for the current fiscal upwards to 2.1% with fourth quarter inflation projected at 3.2%. Inflation based on the Consumer Price Index is projected at 4.0% and 4.2% for the first and second quarters of fiscal 2027, respectively.
- The Reserve Bank of India constituted a committee to review the regulatory framework for business correspondents and will release draft guideline amendments for public consultation.
- The Reserve Bank of India (RBI) proposed issuing a discussion paper to explore the introduction of calibrated safeguards in digital payments.
- Union labour minister Mansukh Mandaviya said the Ministry of Labour and Employment plans to decide on raising the wage ceilings of the Employees' Provident Fund Organisation and the Employees' State Insurance Corporation, as well as fixing a national floor wage and increasing the minimum pension under the Employees' Pension Scheme, 1995.
- The government of Maharashtra signed memoranda of understanding (MoUs) worth over Rs 48,000 crore with different companies across sectors, including automobile and steel, for investments in the Vidarbha region of the state.
- RBI governor Sanjay Malhotra said that amid elevated geopolitical uncertainties, the Indian economy is exhibiting resilience, characterised by robust growth and low inflationary pressures.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.72	7.19	7.93	7.98	9.21
3-Yr	6.01	7.22	7.96	8.01	9.24
5-Yr	6.52	7.28	8.12	8.17	9.40
10-Yr	6.74	7.44	8.28	8.33	9.56

* Weighted average yields



Global Indices	Feb 6	1D % Chg	3M % Chg	1Y % Chg
DJIA	50116	2.47	6.83	12.00
Nasdaq	23031	2.18	-0.10	16.37
FTSE 100	10370	0.59	6.51	18.82
DAX	24721	0.94	4.16	12.87
Nikkei 225	54254	0.81	6.62	38.88
Hang Seng	26560	-1.21	0.28	27.13
KOSPI	5089	-1.44	26.39	100.62

Global 10 yr Sov. Yields (%)	Feb 6	1D Ago	3M Ago	1Y Ago
US	4.22	4.21	4.11	4.45
UK	4.51	4.57	4.44	4.48
German	2.84	2.84	2.66	2.37
Japan	2.23	2.22	1.68	1.28

Commodity Prices	Feb 6	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	68.05	67.55	63.38	74.29
NYMEX Crude Oil (\$/bbl)	63.55	63.29	59.43	70.61
Gold (Rs / 10 gm) #	152078	152502	120670	84613

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Currencies Vs INR	Feb 6	1D Ago	M Ago	3M Ago
USD	90.42	90.40	90.18	88.60
GBP	122.74	123.03	122.21	115.75
Euro	106.69	106.55	105.81	101.98
100 Yen	57.64	57.60	57.65	57.58
Forex Reserve (\$ bn)*	723.77	709.41	696.61	695.36

* Data pertains to Jan 30 and Jan 23 respectively Source: CRISIL

Capital Market

- Mahindra Group plans to invest Rs 15,000 crore in Maharashtra over the next ten years, which includes setting up an automobile and tractor manufacturing facility in Nagpur.
- Maruti Suzuki India inked a pact with Andhra Pradesh government for the setting up and maintenance of four automated driving test tracks across the state.
- Power Finance Corporation's board has approved a merger with Rural Electrification Corporation.
- Tata Chemicals invested Rs 515 crore to set up a new greenfield manufacturing facility in Tamil Nadu.

Global Equity

- Wall Street stocks closed higher on Friday, driven by strong gains in tech stocks after forecasting a steep rise in AI-related capital spending.
- 10-year US bond yield ended higher at 4.22% as investors assessed the state of the economy.
- FTSE index closed higher on Friday, boosted by gains in banking stocks amid the Bank of England's rate cut signals if inflation continues to ease.
- Asian markets were trading higher at 8.30 AM.

International

- UK Halifax House Price Index rose 1% year-on-year in January 2026, compared to an upwardly revised 0.4% gain in December 2025.
- Japan coincident economic index fell to 114.5 in December 2025 compared to 114.9 November 2025 while the leading economic index increased to 110.2 from a final reading of 109.9.
- Japan bank lending rose 4.5% year-on-year in January 2026, compared to a 4.4% gain in December 2025.

Upcoming market indicators

- US Exports/ Import Price Dec (Feb 10)
- US Retail Sales, December (Feb 10)
- US CPI Jan (Feb 11)
- China Inflation Rate, Jan (Feb 11)
- US Monthly Budget Statement Jan (Feb 12)
- US Initial Jobless Claims Feb/07 (Feb 12)
- UK Industrial Production, Dec (Feb 12)
- Eurozone Employment Change Prel Q4 (Feb 13)
- India Foreign Exchange Reserves Feb/06 (Feb 13)
- China FDI (YTD) Jan (Feb 16)
- India Unemployment Rate Jan (Feb 16)
- UK Unemployment Rate Dec (Feb 17)
- UK PPI, Jan (Feb 18)
- Japan Balance of Trade Jan (Feb 18)
- US FOMC Minutes (Feb 19)
- US Initial Jobless Claims, Feb/14 (Feb 19)

Key Macro Indicators

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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