

Broad Indices	Feb 16	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83277	0.79	-1.52	9.66	22.87
Nifty 50	25683	0.83	-0.88	12.01	22.51
BSE Mid cap	45988	0.62	-2.54	15.75	NA
Nifty Midcap 100	59723	0.48	-1.67	20.28	32.56

Sectoral Indices	Feb 16	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	62092	-0.79	2.26	25.91
BSE Bankex	68283	1.20	4.01	22.32
BSE CD	59351	0.80	-4.73	8.53
BSE CG	68957	1.05	-2.57	20.24
BSE FMCG	18844	0.59	-7.75	-2.02
BSE Healthcare	42980	0.80	-3.75	7.75
BSE IT	31617	0.08	-10.72	-22.08
BSE Metal	39411	0.73	13.40	42.68
BSE Oil & Gas	28849	0.89	-0.07	23.54
BSE Power	6875	2.40	2.20	18.00
BSE Realty	6494	1.44	-11.21	0.16

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Power Grid	4.74	Kwality Walls	-27.36
Coal India	3.26	Tech Mahindra	-1.34
HDFC Bank	2.39	Bajaj Finance	-1.15
Adani Enterprises	2.09	Maruti	-1.14
Max Health	2.03	Tata Motors	-0.91

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Feb 13	MF Inv Feb 12	DII Inv Feb 16
Buy	16395	13896	13121
Sell	22488	14168	11454
Net	-6093	-271	1667
Net (YTD)	-20116	37246	73772

Policy rates	Feb 16	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 16	1W Ago	M Ago	3M Ago
Call (%)	4.60	4.40	5.40	5.45
10 Yr Gilt(%) [^]	6.67	6.76	6.68	6.53
TREP (%)	4.30	5.00	4.84	5.21

Short-term debt	Feb 16	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.40	7.55	7.15	6.53
6-month CPs (%)	7.40	7.62	7.25	6.68
3-month CDs (%)	6.98	7.04	6.85	5.97
6-month CDs (%)	6.90	7.12	7.03	6.22
182-day T-bill (%) [^]	5.47	5.55	5.60	5.55
364-day T-bill (%) [^]	5.54	5.65	5.60	5.52

Long-term debt	Feb 16	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.95	6.00	5.91	5.92
5-Y G-sec (%)	6.41	6.52	6.47	6.18
10-Y G-sec (%)	6.67	6.76	6.68	6.53

[^]Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Monday, driven by upswings in financial, energy, pharmaceutical and healthcare stocks.
- The top gainers were Power Grid Corporation of India, Coal India, HDFC Bank, Adani Enterprises and Max Healthcare Institute, up 2.03- 4.74%.
- The top losers were Kwality Wall's (India) Limited, Tech Mahindra, Bajaj Finance, Maruti Suzuki India and Tata Motors Passenger Vehicles, down 0.91- 2.01%.

Indian Debt

- The interbank call-money rate ended lower at 4.60% on Monday compared to 5.05% on Friday.
- Government bond prices rose on Monday, tracking rally in US bond prices after softer US inflation data and surplus in banking system liquidity.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended lower at 6.66% on Monday compared to 6.68% on Friday.

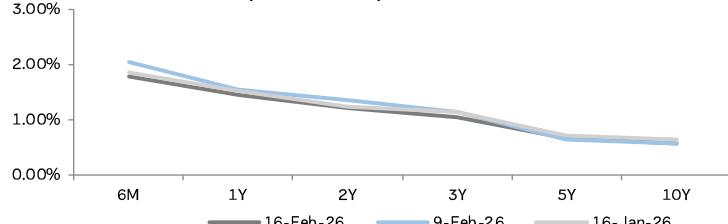
Economy and Government

- India wholesale prices rose 1.81% year-on-year in January 2026, compared to a 0.83% increase in December 2025.
- India's unemployment rate rose to 5.0% in January 2026 compared to 4.8% in December 2025.
- According to government export and import data India's merchandise trade deficit surged to \$34.68 billion in January 2026 compared to \$25.04 billion in December 2025.
- Chief Economic Advisor V Anantha Nageswaran said adoption of Artificial Intelligence requires urgency, political will and a national commitment towards aligning technology with mass employability.
- The Reserve Bank of India's (RBI) drafted norms aimed at curbing mis-selling of financial products could weigh more heavily on the private sector banks given their higher reliance on insurance income.
- SEBI proposed revising how ETFs determine base prices and daily price bands to better reflect real-time market conditions and reduce manual errors.

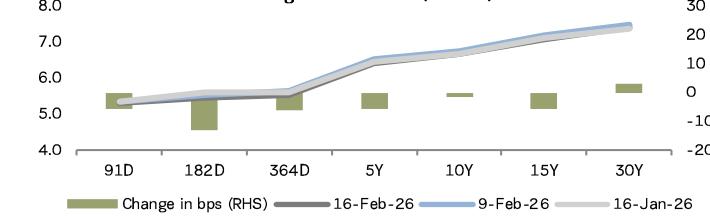
Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.66	6.95	7.69	7.74	8.97
3-Yr	5.95	7.08	7.82	7.87	9.10
5-Yr	6.41	7.19	8.03	8.08	9.31
10-Yr	6.67	7.35	8.19	8.24	9.47

* Weighted average yields

Corporate Bond Spreads AAA (M-o-M)



Sovereign Yield Curve (M-o-M)



Global Indices	Feb 16	1D % Chg	3M % Chg	1Y % Chg
DJIA	Closed	NA	NA	NA
Nasdaq	Closed	NA	NA	NA
FTSE 100	10474	0.26	7.99	19.94
DAX	24801	-0.46	3.87	10.16
Nikkei 225	56806	-0.24	12.76	45.10
Hang Seng	26706	0.52	0.50	18.06
KOSPI	Closed	NA	NA	NA

Global 10 yr Sov. Yields (%)	Feb 16	1D Ago	3M Ago	1Y Ago
US	NA	4.04	4.14	4.47
UK	4.405	4.42	4.58	4.50
German	2.7556	2.75	2.72	2.42
Japan	2.193	2.21	1.70	1.34

Commodity Prices	Feb 16	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	68.65	67.75	64.29	74.74
NYMEX Crude Oil (\$/bbl)	Closed	62.89	59.95	70.74
Gold (Rs / 10 gm) #	154098	152765	124794	85998

ibjartates spot prices

Currencies Vs INR	Feb 16	1D Ago	M Ago	3M Ago
USD	90.71	90.74	90.65	88.74
GBP	123.76	123.45	121.31	116.72
Euro	107.65	107.62	105.22	103.32
100 Yen	59.24	59.20	57.24	57.44
Forex Reserve (\$ bn)*	717.06	723.77	687.19	687.03

* Data pertains to Feb 6 and Jan 30 respectively Source: CRISIL

Capital Market

- Motilal Oswal Alternates raised Rs 8,500 crore (\$930 million) for its fifth private equity vehicle, India Business Excellence Fund V (IBEF V), marking its largest-ever PE fund.
- SKF India is set to invest Rs 653 crore in the construction of a new manufacturing facility in Pune. EaseMyTrip plans to raise up to Rs 500 crore in capital to support expansion across high-potential segments, particularly in hotels and holidays.
- Shriram Properties Ltd bought a 4-acre land in Bengaluru to develop a housing project with an expected revenue of about Rs 600 crore.
- Torrent Power Ltd plans to acquire 100% equity and convertible instruments in Nabha Power Ltd from L&T Power Development Ltd.
- In-Solutions Global Ltd (ISG) received regulatory authorisation from the Reserve Bank of India (RBI) across all three Payment Aggregator categories - online, physical or offline and cross-border.
- JSW MG Motor plans to invest up to \$440 million to expand its India factory and launch new cars with a focus on hybrid and electric models
- Reliance Consumer Products Limited has formed a majority-owned joint venture with Nigeria-based TGI Group.

Global Equity

- FTSE index closed higher on Monday supported by gains in defence stocks on expectations of higher UK military spending.
- Asian markets were trading higher at 8.30 AM.

International

- Eurozone Industrial production rose to 1.2% year over year in December 2025 compared to 2.2% gain in November 2025.
- Japan Industrial Production increased 2.6% in December 2025 compared to a decline of 2.2% in November 2025.

Upcoming market indicators

- 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	2.75% (Jan-2026)
WPI	0.83% (Dec-2025)
IIP	7.8% (Dec -2025)
GDP Growth Rate	8.2% (Jul-Sep FY'26)

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