

Broad Indices	Feb 17	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	83451	0.21	-1.77	9.81	22.91
Nifty 50	25725	0.17	-1.11	12.05	22.52
BSE Mid cap	46193	0.45	-2.75	15.68	NA
Nifty Midcap 100	59882	0.27	-1.41	20.12	33.28

Sectoral Indices	Feb 17	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	62425	0.54	1.92	27.17
BSE Bankex	68658	0.55	3.78	22.67
BSE CD	59853	0.85	-4.42	8.47
BSE CG	69484	0.76	-2.41	21.76
BSE FMCG	19008	0.87	-7.23	-0.91
BSE Healthcare	43190	0.49	-3.82	7.06
BSE IT	31980	1.15	-9.90	-20.65
BSE Metal	39042	-0.93	12.31	40.29
BSE Oil & Gas	28892	0.15	-0.38	22.82
BSE Power	6878	0.05	1.40	17.18
BSE Realty	6479	-0.23	-11.80	0.11

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Adani Enter	2.74	Kwality	-5.00
ITC	2.34	Hindalco	-1.87
BEL	1.97	ETERNAL	-1.83
Infosys Ltd.	1.88	Tata Steel	-1.42
L&T	1.77	Trent Ltd.	-1.41

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Feb 16	MF Inv Feb 13	DII Inv Feb 17
Buy	9820	15887	12483
Sell	10034	12365	12296
Net	-214	3523	187
Net (YTD)	-20330	40769	73959

Policy rates	Feb 17	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 17	1W Ago	M Ago	3M Ago
Call (%)	5.08	4.45	5.40	4.95
10 Yr Gilt(%) <sup>^</sup>	6.66	6.73	6.68	6.55
TREP (%)	5.00	5.03	4.84	5.12
Short-term debt	Feb 17	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.45	7.60	7.15	6.54
6-month CPs (%)	7.45	7.65	7.25	6.68
3-month CDs (%)	7.00	7.00	6.85	6.01
6-month CDs (%)	6.90	7.12	7.03	6.22
182-day T-bill (%) <sup>^</sup>	5.50	5.55	5.60	5.52
364-day T-bill (%) <sup>^</sup>	5.55	5.62	5.60	5.54
Long-term debt	Feb 17	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.92	5.99	5.91	5.92
5-Y G-sec (%)	6.40	6.48	6.47	6.21
10-Y G-sec (%)	6.66	6.73	6.68	6.55

^Weighted average yield

## Indian Equity

- Indian equity benchmarks closed higher on Tuesday, driven by gains in IT after a sector leader announced a collaboration to develop and deploy advanced enterprise AI solutions.
- The top gainers were Adani Enterprises, ITC, Bharat Electronics, Infosys, and Larsen & Toubro, up 1.77-2.74%.
- The top losers were Kwality Wall's India, Hindalco Industries, Eternal, Tata Steel and Trent, down 1.41-5.00%.

## Indian Debt

- The interbank call-money rate ended higher at 5.08% on Tuesday compared to 4.60% on Monday.
- Government bond prices were steady on Tuesday, as robust state debt demand and ample liquidity offset supply concerns.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.66% on Tuesday.

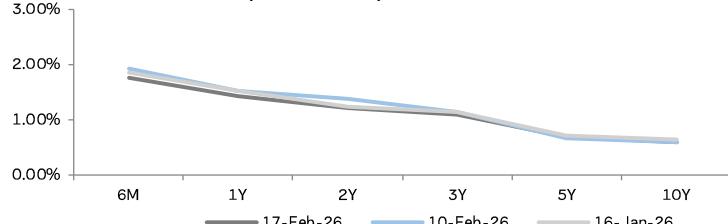
## Economy and Government

- NHAI accepted National Highways Infra Trust's offer of Rs 6,220.90 crore for the asset monetisation of two highway sections of 310 kilometres.
- Prime Minister Narendra Modi said India is seeking to position itself as a stabilising force in a world marked by geopolitical churn and economic uncertainty.
- The Insolvency and Bankruptcy Board of India (IBBI) in a discussion paper suggested that the committee of creditors (CoC) record its deliberations on the expected recovery for creditors in comparison with the fair value and liquidation value.

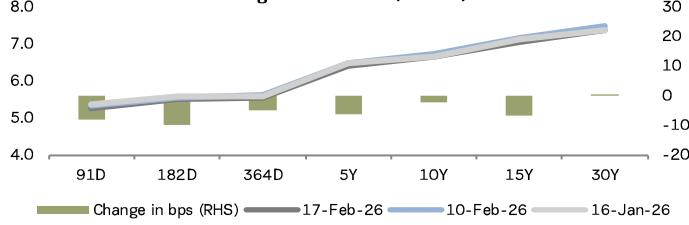
Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.63	6.95	7.69	7.74	8.97
3-Yr	5.92	7.08	7.82	7.87	9.10
5-Yr	6.40	7.19	8.03	8.08	9.31
10-Yr	6.66	7.35	8.19	8.24	9.47

\* Weighted average yields

#### Corporate Bond Spreads AAA ( M-o-M )



#### Sovereign Yield Curve (M-o-M)



Global Indices	Feb 17	1D % Chg	3M % Chg	1Y % Chg
DJIA	49533	0.07	6.32	11.20
Nasdaq	22578	0.14	-0.57	12.74
FTSE 100	10556	0.79	9.10	20.39
DAX	24998	0.80	5.97	9.65
Nikkei 225	56566	-0.42	12.40	44.40
Hang Seng	Closed	NA	NA	NA
KOSPI	Closed	NA	NA	NA

Global 10 yr Sov. Yields (%)	Feb 17	1D Ago	3M Ago	1Y Ago
US	4.05	4.04	4.13	4.47
UK	4.38	4.41	4.54	4.53
German	2.74	2.76	2.71	2.48
Japan	2.13	2.19	1.73	1.39

Commodity Prices	Feb 17	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	67.42	68.65	64.2	75.22
NYMEX Crude Oil (\$/bbl)	62.33	Closed	59.91	71.39
Gold (Rs / 10 gm) #	151865	154098	122924	85254

# ibjارات spot prices

Currencies Vs INR	Feb 17	1D Ago	M Ago	3M Ago
USD	90.77	90.71	90.65	88.63
GBP	123.57	123.76	121.31	116.45
Euro	107.52	107.65	105.22	102.79
100 Yen	59.38	59.24	57.24	57.26
Forex Reserve (\$ bn)*	717.06	723.77	687.19	687.03

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

## Capital Market

- Navikenz raised \$11.6 million in a round led by Sekar PRC, Sudip Nandy with existing investors participating.
- Adani Group plans to invest \$100 billion to build data centers for artificial intelligence (AI) in India by 2035.
- Black Box Ltd entered into definitive agreements to acquire Brazil-based 2S Inovações Tecnológicas for Rs 275 crore, with completion expected by March 2026 as part of its international expansion and revenue growth plans.
- Infosys announced a strategic collaboration with American artificial intelligence company Anthropic to develop and deploy advanced enterprise AI solutions for companies across telecommunications, financial services, manufacturing, and software development.
- Delhivery Ltd. entered a pact with electric mobility startup RIDEV to deploy 150 electric vehicles to scale green logistics.
- Union Minister announced that India plans to boost its AI computing capabilities by adding 20,000 GPUs, which will increase the total capacity to over 58,000 GPUs, significantly enhancing the country's artificial intelligence infrastructure.

## Global Equity

- Wall Street stocks closed marginally higher on Tuesday boosted by gains in technology and financial shares.
- 10-year US bond yield ended higher at 4.05% as investors remained cautious ahead of key economic data releases.
- FTSE index closed higher on Tuesday supported by signs of a cooling labour market, strengthening expectations of a potential interest rate cut.
- Asian markets were trading higher at 8.30 AM.

## International

- US NY Empire State Manufacturing Index fell to 7.1 in February 2026 compared to 7.7 in January 2026.
- Eurozone ZEW Indicator of Economic Sentiment eased by 1.4 points to 39.4 in February 2026 compared to 40.8 in January 2026.
- UK unemployment rate rose to 5.2% in December 2025 compared to 5.1% in November 2025.
- Japan trade deficit decreased significantly to JPY 1,152.7 billion in January 2026 compared to JPY 2,741.7 billion in the same month a year earlier.

## Upcoming market indicators

- China FDI (YTD) Jan (Feb 17)
- India Unemployment Rate Jan (Feb 17)
- 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	1.81% (Jan-2026)
IIP	7.8% (Dec -2025)
GDP Growth Rate	8.2% (Jul-Sep FY'26)

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