

Broad Indices	Mar 24	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	74068	1.89	-13.28	-5.02	20.36
Nifty 50	22912	1.78	-12.35	-3.15	20.05
BSE Mid cap	41493	2.42	-11.35	-2.10	NA
Nifty Midcap 100	54087	2.60	-10.53	2.98	30.09

Sectoral Indices	Mar 24	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54195	2.30	-12.51	10.10
BSE Bankex	59218	2.40	-10.48	-0.72
BSE CD	53342	2.46	-11.09	-3.95
BSE CG	65887	1.90	-2.40	4.41
BSE FMCG	17083	1.41	-15.53	-11.82
BSE Healthcare	41878	1.34	-4.89	-1.03
BSE IT	28552	1.65	-24.38	-22.02
BSE Metal	36540	1.74	2.95	16.54
BSE Oil & Gas	25595	1.70	-8.45	0.60
BSE Power	6789	0.85	4.36	1.37
BSE Realty	5238	1.51	-23.67	-22.98

Nifty			
Top Out performers	% Change	Top Under performers	% Change
InterGlobe	5.49	Coal India	-3.00
L&T	5.17	Power Grid	-1.36
Bajaj Finance	4.97	Adani Enterp	-0.43
ETERNAL	4.89	Sun Pharma	-0.32
Asian Paints	4.68	CIPLA	-0.15

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Mar 23	MF Inv Mar 20	DII Inv Mar 24
Buy	10703	18965	21127
Sell	22002	14666	15260
Net	-11299	4299	5867
Net (YTD)	-116112	128255	219665

Policy rates	Mar 24	1W Ago	M Ago	3M Ago
Repo (%)	5.25	5.25	5.25	5.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	3.00	3.00	3.00	3.00

Overnight rates	Mar 24	1W Ago	M Ago	3M Ago
Call (%)	4.80	5.30	4.75	4.80
10 Yr Gilt(%)^	6.86	6.71	6.67	6.56
TREP (%)	5.00	5.00	4.78	5.36

Short-term debt	Mar 24	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.75	7.55	7.42	6.47
6-month CPs (%)	7.78	7.65	7.42	6.83
3-month CDs (%)	7.50	7.23	7.01	6.02
6-month CDs (%)	7.45	7.28	7.00	6.34
182-day T-bill (%)^	5.50	5.50	5.47	5.47
364-day T-bill (%)^	5.65	5.60	5.55	5.52

Long-term debt	Mar 24	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.25	6.12	5.86	5.74
5-Y G-sec (%)	6.66	6.46	6.39	6.31
10-Y G-sec (%)	6.86	6.71	6.67	6.56

^Weighted average yield

Indian Equity

- Indian equity benchmarks ended Tuesday with a gain, driven by improved investor confidence following US President Donald Trump's decision to temporarily halt military action against Iran.
- The top gainers were InterGlobe Aviation, Larsen & Toubro, Bajaj Finance, ETERNAL and Asian Paints, up 4.68%-5.49%.
- The top losers were Coal India, Power Grid Corporation of India, Adani Enterprises, Sun Pharmaceutical Industries and Cipla, down 0.32%-3.00%.

Indian Debt

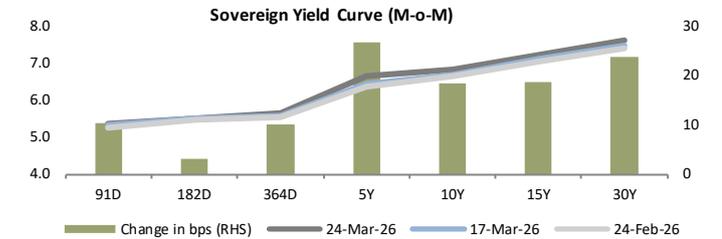
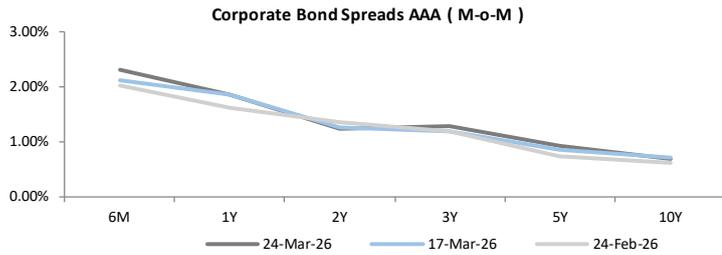
- The interbank call-money rate ended lower at 4.80% on Tuesday compared to 5.25% on Monday.
- Government bond prices fell on Tuesday due to slight cooling in global crude oil prices on hopes of US-Iran talks.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.87% on Tuesday compared to 6.84% on Monday.

Economy and Government

- India HSBC Flash Manufacturing PMI fell to 53.8 in March 2026 compared to 56.9 in February 2026 while the HSBC Flash Composite PMI edged down to 56.5 from 58.9 and the HSBC India Services PMI eased to 57.2 from 58.1.
- Prime Minister Narendra Modi said the government is trying to procure gas and crude oil from all available sources, and efforts will continue in the coming days as the war in West Asia has created a serious energy crisis globally.
- The government extended the validity of licences issued for gold import at quota-based duty concession under a free trade pact with the UAE till June 3 amid the West Asian crisis.
- The Delhi government will finance its through its own revenue pegged at Rs 74,000 crore and Rs 16,700 crore market borrowing through the RBI.
- Japan International Cooperation Agency (JICA) signed four loan projects, including a project for promoting sustainable horticulture in Punjab and Mumbai Metro Line, aggregating to Rs 16,420 crore.
- The Odisha government signed a tripartite agreement to set up a visa application centre between the home department, the Bhubaneswar Development Authority (BDA) and VFS Global Group.
- Rajasthan government has introduced a new semiconductor policy designed to draw major investments and generate a large number of jobs. The policy emphasizes building a comprehensive semiconductor ecosystem, including the creation of specialized corridors to facilitate manufacturing and associated sectors.
- The Reserve Bank of India (RBI) injected Rs 55,837 crore transient liquidity into the banking system through three-day variable rate repo (VRR) auction.
- Sebi proposed introducing gift cards or gift prepaid payment instruments (PPIs) for investments in mutual funds to improve financial inclusion through onboarding of new investors in the space.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.88	7.45	8.19	8.24	9.47
3-Yr	6.25	7.54	8.28	8.33	9.56
5-Yr	6.66	7.59	8.43	8.48	9.71
10-Yr	6.86	7.65	8.49	8.54	9.77

* Weighted average yields



Global Indices	Mar 24	1D % Chg	3M % Chg	1Y % Chg
DJIA	46124	-0.18	-5.35	8.31
Nasdaq	21762	-0.84	-7.84	19.65
FTSE 100	9965	0.72	0.96	15.36
DAX	22637	-0.07	-7.00	-0.94
Nikkei 225	52252	1.43	3.79	38.94
Hang Seng	25064	2.79	-2.93	4.84
KOSPI	5554	2.74	35.18	111.01

Global 10 yr Sov. Yields (%)	Mar 24	1D Ago	3M Ago	1Y Ago
US	4.39	4.34	4.15	4.34
UK	4.98	4.90	4.51	4.72
German	3.01	3.02	2.87	2.77
Japan	2.26	2.29	2.05	1.53

Commodity Prices	Mar 24	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	104.49	99.94	62.24	73
NYMEX Crude Oil (\$/bbl)	92.35	88.13	58.35	69.11
Gold (Rs / 10 gm)#	140420	139569	136627	87719

ibjirates spot prices

Currencies Vs INR	Mar 24	1D Ago	M Ago	3M Ago
USD	93.88	93.90	90.97	89.77
GBP	125.83	124.82	122.70	121.37
Euro	108.74	108.22	107.16	105.94
100 Yen	59.16	58.83	58.65	57.64
Forex Reserve (\$ bn)*	709.76	716.81	725.73	688.95

* Data pertains to Mar 13 and Mar 6 respectively Source: CRISIL

Key Macro Indicators	
CPI	3.21% (Feb-2026)
WPI	2.13% (Feb-2026)
IIP	4.8% (Jan -2026)
GDP Growth Rate	7.8% (Oct-Dec FY'26)

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Capital Market

- Ozi secured \$6.2 million in funding, with RTP Global leading the round and additional support from current investors Blume Ventures, Huddle Ventures, Zerpearl VC, as well as several angel investors.
- Euler Motors has secured Rs 437.5 crore in a funding round led by Lightrock, with Hero MotoCorp and Blume Ventures also participating.
- VinFast Auto India partnered with CSB Bank to offer auto and inventory financing for its dealer network and customers.
- Kalpataru Projects International Ltd (KPIL) secured orders worth about Rs 4,439 crores in the Transmission and Distribution (T&D) business.
- Suzlon Group secured a 100 MW wind energy project from Gas Authority of India Ltd (GAIL).
- NeuEN Green Energy secured a contract to supply 10 thousand tonnes per annum (KTPA) of green hydrogen to Numaligarh Refinery (NRL).
- Sattva Group announced the launch of Sattva City, a large-scale residential development in North Bengaluru, with an estimated gross development value (GDV) of over Rs 8,600 crore.
- SEPC's board approved the acquisition of Avenir International Engineers and Consultants LLC, Abu Dhabi.

Global Equity

- Wall Street stocks slipped on Tuesday as Iran-war uncertainty and higher treasury yields overshadowed brief optimism over conflict resolution talks.
- 10-year US bond yield ended higher at 4.39% on renewed volatility in oil markets and continued military attacks in the Middle East.
- FTSE index ended higher on Tuesday driven by gains in energy stocks as investors assessed mixed signals from the Middle East conflict.
- Asian markets were trading higher at 8.30 AM.

International

- US S&P Global Flash Manufacturing PMI rose to 52.4 in March 2026 compared to 51.6 in February 2026 while the S&P Global Flash Services PMI fell to 51.1 from 51.7 and the S&P Global Flash Composite PMI declined to 51.4 from 51.9.
- Eurozone S&P Global Flash Manufacturing PMI rose to 51.4 in March 2026 compared to 50.8 in February 2026 while the S&P Global Flash Services PMI fell to 50.1 from 51.9 and the S&P Global Flash Composite PMI declined to 50.5 from 51.9.
- UK S&P Global Flash Manufacturing PMI eased to 51.4 in March 2026 compared to 51.7 in February 2026 while the S&P Global Flash Services PMI fell to 51.2 from 53.9 and the S&P Global Flash Composite PMI fell to 51.0 from 53.7.

Upcoming market indicators

- Eurozone Consumer Confidence Flash, Mar (Mar 24)
- US Richmond Fed Manufacturing Index, Mar (Mar 24)
- Eurozone HCOB Composite/ Services/ Manufacturing PMI Flash, March (Mar 24)
- US Building Permits Final, Feb (Mar 25)
- UK CBI Distributive Trades, March (Mar 25)
- US Kansas Fed Manufacturing Index, March (Mar 26)
- Eurozone ECB General Council Meeting (Mar 26)