

Domestic Market Performance

Indian market indices	06-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	23603	-0.39	-0.05	5.72	7.63
BSE Sensex	78058	-0.27	0.12	5.98	8.13
BSE 100	24742	-0.49	-0.93	6.22	8.76
BSE 200	10697	-0.53	-1.65	5.91	8.29
BSE 500	34100	-0.49	-2.43	6.42	7.70
BSE SmallCap	50505	0.00	-7.05	17.00	9.06
BSE MidCap	42995	-0.87	-6.11	9.34	9.27
BSE LargeCap	9079	-0.46	-0.86	4.58	7.34
Sectoral indices					
BSE IT	42399	0.35	-2.49	18.95	8.63
BSE Oil & Gas	25241	-0.70	-2.82	-8.69	-11.01
BSE FMCG	20305	-0.92	-1.79	5.11	2.95
BSE Auto	52337	-0.86	-1.20	6.50	14.91
BSE Bankex	57059	0.02	0.56	6.62	10.57
BSE Teck	19287	-0.26	-1.73	19.71	12.43
BSE Capital Goods	61525	-0.84	-7.51	0.95	8.92
BSE Consumer Durable	58336	-2.04	-10.49	11.59	18.02

Turnover (Rs Cr)	06-Feb	05-Feb
BSE Cash	4824	5318
NSE Cash	90769	94512
NSE F&O	35052084	15614709

Rs. Cr (Equity)	FII Inv 05-Feb	MF Inv 04-Feb	DII Inv 06-Feb
Buy	14,873	10,745	11,546
Sell	16,021	12,875	8,824
Net	-1,148	-2,130	2,722
Net (MTD)	-3,747	147	6,820
Net (YTD)	-76,423	57,766	86,141

	06-Feb	1Day	Month ago	Year ago
USD	87.56	87.22	85.83	83.05
GBP	109.36	108.87	106.81	104.26
Euro	90.98	90.60	88.52	89.34
100 Yen	57.43	56.94	54.43	55.91

Indian markets

- Indian equity benchmarks ended lower on Thursday led by losses in consumer stocks ahead of the RBI's policy decision and due to lingering worries around global trade conflicts.
- The top losers were Trent, Bharat Electronics Ltd, Bharti Airtel, Titan Company and NTPC, down 2.13-8.22%.
- The top gainers were Cipla, Adani Ports, Infosys, Tata Consumer Products and Dr Reddy's Labs, up 0.74-2.42%.

Indian debt

- The interbank call money rate ended higher at 6.25% on Thursday compared to 5.75% on Wednesday.
- Government bond prices ended higher on Thursday owing to market expectations of rate cuts by RBI.
- The yield of the 10-year benchmark 06.79% GS 2034 paper ended lower at 6.65% on Thursday compared to 6.66% on Wednesday.

Indian Rupee

- The rupee closed lower against the US dollar on Thursday, pressured by weak Asian peers and trade tariff uncertainty and foreign flows outflows also persisted ahead of the RBI's policy decision.

Regulatory

- The Insolvency and Bankruptcy Board of India (IBBI) allowed resolution professionals (RP) to hand over possession of plots, flats, or buildings to homebuyers while the resolution process is still ongoing.

Economy and Government

- President Droupadi Murmu emphasised the need for early and comprehensive reform of key multilateral bodies, including the United Nations Security Council, to make them reflective of contemporary global realities.
- India maintained its third position on the U.S. Green Building Council's (USGBC) annual list of top countries for Leadership in Energy and Environmental Design (LEED) in 2024.
- Chief Minister Mamata Banerjee said West Bengal received investment proposals worth over Rs 4.40 lakh crore during the two-day business conclave.
- The Central government ministries or departments engage contractual services as per their requirement after completing all necessary procedural formalities.

Domestic Debt Market Indicators

Instrument	06-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	6.25%	5.75%	5.75%	6.35%	6.24%	6.00%
3-Month T-Bill	6.42%	6.42%	6.53%	6.45%	6.93%	7.03%
6-Month T-Bill	6.53%	6.55%	6.64%	6.59%	7.04%	7.09%
1-year T-Bill	6.51%	6.50%	6.64%	6.58%	7.07%	7.14%
3-Month CD	7.34%	7.41%	7.39%	7.18%	7.55%	7.80%
6-Month CD	7.52%	7.58%	7.56%	7.40%	7.37%	7.82%
1-year CD	7.48%	7.57%	7.64%	7.50%	7.62%	7.85%
3-Month CP	7.66%	7.75%	7.67%	7.51%	8.15%	8.49%
6-Month CP	7.85%	7.90%	7.80%	7.80%	7.71%	8.49%
1-year CP	7.82%	7.86%	7.95%	7.85%	8.10%	8.35%
1-year Gilt	6.53%	6.56%	6.71%	6.72%	7.14%	6.98%
3-year Gilt	6.59%	6.57%	6.69%	6.73%	7.16%	7.01%
5-year Gilt	6.64%	6.63%	6.73%	6.77%	7.05%	7.01%
1-year AAA	7.46%	7.46%	7.50%	7.59%	7.70%	7.83%
3-year AAA	7.30%	7.30%	7.35%	7.37%	7.70%	7.71%
5-year AAA	7.22%	7.20%	7.23%	7.32%	7.70%	7.65%
10-year G-sec	6.66%	6.66%	6.76%	6.80%	7.05%	7.09%
Net LAF (Rs Cr)	-45006	-38216	-97826	276890	104121	-100990
Forex reserves (\$ bn)	629.56	623.83	640.28	684.81	642.49	616.73

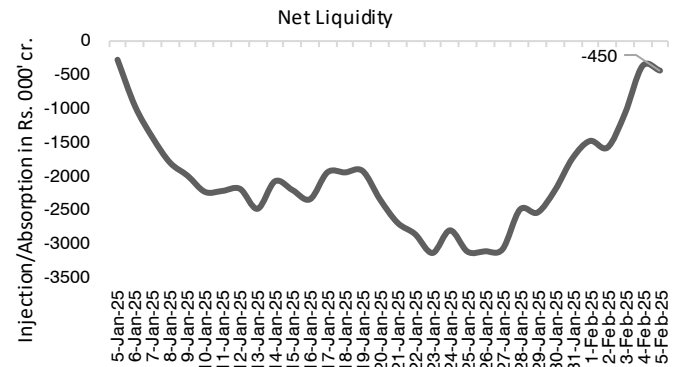
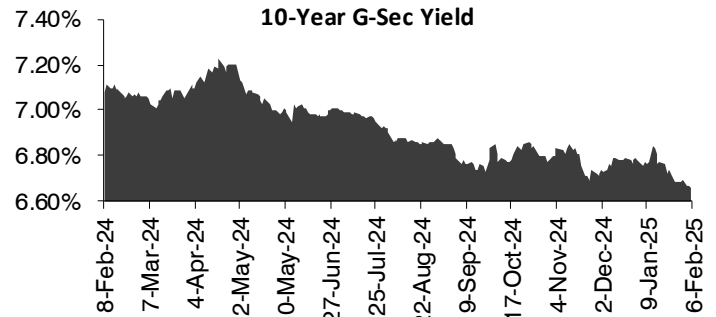
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	6.53	7.65	8.42	8.44	9.69	10.16
1 Year	6.53	7.46	8.23	8.25	9.50	9.97
3 Year	6.59	7.30	8.07	8.09	9.34	9.81
5 Year	6.64	7.22	8.11	8.12	9.38	9.85
10 Year	6.66	7.22	8.11	8.12	9.38	9.85

Rs. Cr (Debt)	FII Inv 05-Feb	MF Inv 04-Feb
Buy	452	10,676
Sell	71	13,369
Net	381	-2,693
Net (MTD)	819	-6,556
Net (YTD)	-2,132	-61,765

Economic Indicators	Latest	Quarter	Year Ago
CPI	5.22% (Dec-24)	5.49% (Sep-24)	5.69% (Dec-23)
WPI	2.37% (Dec-24)	1.84% (Sep-24)	0.86% (Dec-23)
IIP	5.2% (Nov-24)	-0.1% (Aug-24)	2.5% (Nov-23)
GDP	5.4% (Jul-Sep FY'25)	6.7% (Apr-Jun FY'25)	8.1% (Jul-Sep FY'24)
India Manufacturing PMI	58 (Jan-25)	57.5 (Oct-24)	56.5 (Jan-24)
India Service PMI	59.3 (Dec-24)	57.7 (Sep-24)	54.9 (Dec-23)

Capital markets

- Astra Security raised \$2.7 million from Emergent Ventures.
- P S Raj Steels fixed a price band of Rs 132-140 per share for its initial public offering (IPO).
- PlaySuper has raised \$500,000 in a seed funding round led by IAN Angel Fund and 100X.VC, with participation from angel investors.
- Advanced Sys-Tek Ltd has filed a draft red herring prospectus (DRHP) with the SEBI to raise funds through an initial public offering (IPO).



Global market indices	06-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	44747.63	-0.28	4.78	12.41	16.16
Nikkei 225	39066.53	0.61	-0.61	-2.74	8.04
FTSE	8727.28	1.21	5.79	9.74	13.62
Hang Seng	20891.62	1.43	6.11	26.30	29.47
Taiwan	23316.6	0.67	-0.98	15.73	28.85

Global debt	06-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.45	4.43	4.62	4.42	4.21	4.10
UK 10-Year (%)	4.48	4.44	4.61	4.56	3.98	3.98
German 10-Year (%)	2.37	2.36	2.45	2.39	2.29	2.29
Japan 10-Year (%)	1.28	1.27	1.13	0.99	0.71	0.71

Domestic	06-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	84613	-0.05	9.66	25.81	35.43
Silver (Rs / Kg)	94762	-0.69	6.29	27.84	35.41
Aluminium (Rs / Kg)	257	1.14	7.28	23.70	28.01
Copper (Rs / kg)	852	2.01	6.21	12.25	18.58
Lead (Rs / kg)	191	3.11	4.93	5.48	1.87
Zinc (Rs / Kg)	273	1.21	-1.71	24.91	45.64
Nickel (Rs / kg)	1379	2.64	5.04	-3.05	-0.18

Global	06-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	2870.03	0.96	8.69	0.96	41.71
Silver (oz/\$)	3248.00	0.50	9.69	0.50	45.58
Brent (\$/bbl)	74.29	-0.43	-2.63	-0.43	-5.47
NYMEX crude (\$/bbl)	70.61	-0.59	-4.01	-0.59	-3.68

Upcoming market indicators

Date	Indicator	Previous
February 07	US Nonfarm Payrolls, January	256,000
February 07	US Unemployment rates, January	4.1%
February 07	India RBI Interest Rate Decision	6.5%
February 09	China Inflation, January	0.1%
February 12	India Inflation Rate, January	5.22%

Global markets:

- Wall Street stocks ended mixed on Thursday with Nasdaq gaining driven by tech stocks benefiting from AI growth while Dow Jones declined due to sector specific losses.
- 10-year US bond yield ended higher at 4.45% as investors waiting for January's nonfarm payrolls report.
- FTSE index ended higher on Thursday boosted by strong earnings from AstraZeneca and a weaker pound after the Bank of England's 25-basis point rate cut to 4.5%.
- Asian markets were trading higher at 8.30 AM.
- US Initial jobless claims in the US rose by 11,000 from the previous week to 219,000 in the last week of January 2025.
- Eurozone retail sales rose by 1.9% year-on-year in December compared to revised 1.6% increase in November.
- Eurozone HCOB Construction PMI rose to 45.4 in January compared to 42.9 in December.
- Bank of England cut its Bank Rate by 25bps to 4.5% in February compared to 4.75% in January.
- UK S&P Global Construction PMI fell sharply to 48.1 in January compared to 53.3 in December.
- Japan Household spending increased by 2.7% on-year in December from a 0.4% decline in November.
- According to the IMF, the Bank of Japan is likely to raise interest rates this year, reaching neutral levels by 2027.

Commodity

- Crude oil prices fell 42 cents to \$70.61 a barrel on the NYMEX after US President reiterated plans to boost US production, adding concerns after a larger-than-expected rise in US crude stockpiles.
- Domestic gold prices ended lower due to profit booking at higher level.

Forthcoming results

Date	Company
NA	NA

Source: Domestic Indices - NSE, BSE, FII / MF (Equity) – SEBI, Domestic Derivative Statistics – NSE, Currency Movement - RBI, Domestic Economic Indicators - CRISIL Center for Economic Research, Domestic Fixed Income Numbers - CRISIL Fixed Income Database, RBI Commodity Prices – Domestic -MCX, IBJA, International- gold.org, , Respective websites, International Indices, – Respective websites, Market summaries, global bond yields, domestic and international news – CRISIL Research, Respective websites
Abbreviations: FII (Foreign Institution Investors), CPI (Consumer Price Index), WPI (Wholesale Price Index), GDP (Gross Domestic Product), PMI (Purchasing Manufacturing Index), P/E (Price/Earnings ratio), CP (Commercial Papers), CD (Certificate Of Deposits), G-sec (Government Securities), T-Bill (Treasury Bill), DJIA (Dow Jones), FTSE (FTSE 100), Hang Seng (Hang Seng Index), USD (US Dollar), GBP (British Pound), ,100 Yen (Japanese Yen), MTD – Month to Date, FYTD – Financial Year to Date

Indicators		Dec-24	Nov-24	Oct-24	Sep-24	Aug-24	Jul-24	Jun-24	May-24	Apr-24	Mar-24
Debt Indicators	Currency in circulation (Rs billion)	35,643	35,589	35,103	34,994	35,231	35,600	35,814	35,792	35,455	34,849
	Repo rate	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%	6.50%
	10-year G-sec yield	6.76%	6.75%	6.85%	6.75%	6.86%	6.92%	7.01%	6.99%	7.20%	7.05%
	Call rate	6.00%	6.70%	5.75%	6.24%	6.50%	6.50%	6.25%	6.24%	6.70%	6.24%
	Forex reserves (\$ billion; mthly. avg.)	648.099	666	694	688.744	674	662	653	644	644	633
Economy	GDP	NA	NA	NA	5.40%			6.70%			7.80%
	Fiscal deficit (Rs billion)	NA	95.77	276.3	393.44	1582.31	1412.33	850.97	-1595.21	2101.36	1523.05
	IIP, %y/y	NA	5.20%	3.50%	3.10%	-0.10%	4.70%	4.70%	5.90%	5.00%	5.40%
	Exports, \$ billion	38.01	32.11	39.2	34.58	34.71	33.98	35.2	38.13	34.99	41.68
	Imports, \$ billion	59.95	69.95	66.34	55.36	64.36	57.48	56.18	61.91	54.09	57.28
	Manufacturing PMI	56.4	56.5	57.5	56.5	57.5	58.1	58.3	57.5	58.8	59.1
	Services PMI	59.3	58.4	58.5	57.7	60.9	60.3	60.5	60.2	60.8	61.2
	GST collections (Rs crore)	176857	182,269	187,346	173,240	174,962	182,075	173,813	172,739	210,267	178,484
	India crude oil import (mbpd)	NA	19.07	19.71	18.79	20.18	19.40	18.81	22.03	21.44	20.69
Sector update	Auto – Passenger vehicles	NA	20.6%	15.2%	-3.1%	-2.8%	-1.74%	4.30%	20.50%	35.40%	9.74%
	Auto – Two-wheelers	NA	-1.1%	14.2%	15.8%	9.6%	12.45%	21.30%	1.09%	22.78%	15.27%
	Auto – Commercial vehicles	NA	13.8%	1.5%	-22.02%	-11.63%	-12.29%	-8.30%	-0.10%	14.40%	-7.74%
	Auto – Tractors	NA	-1.3%	22.4%	3.7%	-5.8%	1.61%	3.60%	0.00%	-3.00%	-23.05%
	Banks – Deposit growth	11.50%	11.50%	11.80%	11.60%	10.90%	11.30%	11.80%	13.30%	12.50%	13.70%
	Banks – Credit growth	11.28%	11.30%	11.70%	13.00%	13.50%	13.90%	19.30%	19.50%	19.10%	19.10%
	Infra – Coal	NA	7.50%	7.80%	2.60%	-8.10%	6.80%	14.80%	10.20%	7.50%	8.70%
	Infra – Electricity	NA	3.80%	0.60%	-0.50%	-3.70%	7.90%	8.60%	13.70%	10.20%	8.60%
	Infra – Steel	NA	4.80%	4.20%	1.50%	3.90%	6.40%	6.30%	8.90%	9.80%	7.50%
	Infra – Cement	NA	13.00%	3.30%	7.10%	-3.00%	5.50%	1.90%	-0.80%	0.60%	10.60%

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