

Domestic Market Performance

Indian market indices	8-Dec	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25961	-0.86	1.84	10.38	5.20
BSE Sensex	85103	-0.71	2.27	9.93	4.15
BSE 100	27104	-1.06	1.29	10.28	3.46
BSE 200	11670	-1.16	0.76	10.06	2.25
BSE 500	36908	-1.30	0.02	9.91	0.62
BSE SmallCap	49967	-2.20	-5.82	7.14	-12.42
BSE MidCap	45811	-1.73	-2.05	10.30	-3.90
BSE LargeCap	9919	-1.11	0.98	9.80	3.03
Sectoral indices					
BSE IT	37176	-0.51	7.98	2.91	-16.50
BSE Oil & Gas	27658	-1.04	-3.47	10.04	1.20
BSE FMCG	19965	-1.27	-1.95	2.66	-5.70
BSE Auto	61361	-1.21	2.65	28.63	13.29
BSE Bankex	66448	-0.85	2.21	11.60	8.94
BSE Teck	18640	-0.62	7.48	7.44	-7.23
BSE Capital Goods	65733	-2.83	-5.24	4.80	-9.73
BSE Consumer Durable	59876	-1.57	-0.16	10.10	-8.84

Turnover (Rs Cr)	8-Dec	5-Dec
BSE Cash	6989	5922
NSE Cash	96756	91781
NSE F&O	32066458	22576948

Rs. Cr (Equity)	FII Inv 5-Dec	MF Inv 3-Dec	DII Inv 8-Dec
Buy	12,111	12,332	15,950
Sell	12,128	10,769	13,491
Net	-16	1,564	2,460
Net (MTD)	-8,347	2,847	20,010
Net (YTD)	-152,999	469,004	695,964

	8-Dec	1Day	Month ago	Year ago
USD	90.17	89.92	88.71	84.69
GBP	120.21	120.00	116.37	108.07
Euro	105.17	104.82	102.30	89.59
100 Yen	58.08	58.15	57.81	56.26

Indian markets

- Indian equity benchmarks closed lower on Monday, due to profit booking amid persistent foreign fund outflows and caution ahead of the US Federal Reserve's policy decision.
- The top losers were InterGlobe Aviation, Bharat Electronics, JSW Steel, Nestle and Shriram Finance, down 2.52-8.62%.
- The top gainers were Tech Mahindra, Wipro and HCL Technologies, up 0.12-1.22%.

Indian debt

- The interbank call-money rate ended lower at 5.20% on Monday compared to 5.35% on Friday.
- Government bond prices ended lower on Monday after the RBI excluded the liquid 10-year note from its Rs 1 lakh crore OMO plan.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.57% on Monday compared to 6.52% on Friday.

Indian Rupee

- The rupee closed lower against the United States (US) dollar on Monday due to persistent foreign fund outflows and ongoing India-US trade deal negotiations.

Regulatory

- The RBI issued the final Master Direction on Rupee Interest Rate Derivatives, 2025 after reviewing stakeholder feedback and updating the framework to reflect developments in the IRD market, enhance transparency, and better support system-wide risk-management needs.
- The Securities and Exchange Board of India (Sebi) launched the Past Risk and Return Verification Agency (PaRRVA), a new verification mechanism designed to authenticate past performance claims made by regulated market intermediaries.
- Sebi issued a format for registered entities to report their readiness and compliance with accessibility requirements for each investor-facing digital platform, ensuring these platforms can be effectively used by persons with disabilities.
- Sebi issued modalities for migration of existing Alternative Investment Fund (AIF) schemes into accredited investor only (AI-only schemes) or Large Value Funds (LVFs).

Economy and Government

- The government is redesigning the Prasad scheme to boost pilgrim tourism focusing on developing infrastructure at pilgrimage sites.
- The Maharashtra cabinet approved a scheme to construct all-weather motorable approach roads connecting agricultural fields across rural parts of the state.
- The Uttar Pradesh government plans to set up three greenfield hubs for electronics and semiconductors in the hinterland region of the state, in an effort to boost production beyond the Noida-Greater Noida belt.

Domestic Debt Market Indicators

Instrument	8-Dec	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.20%	5.35%	5.40%	5.00%	7.00%	6.24%
3-Month T-Bill	5.25%	5.25%	5.43%	5.48%	6.34%	6.39%
6-Month T-Bill	5.43%	5.45%	5.55%	5.60%	6.47%	6.53%
1-year T-Bill	5.46%	5.45%	5.56%	5.63%	6.40%	6.54%
3-Month CD	5.90%	5.87%	6.01%	5.81%	7.00%	7.14%
6-Month CD	6.23%	6.22%	6.22%	6.13%	7.25%	7.35%
1-year CD	6.43%	6.40%	6.42%	6.38%	7.15%	7.48%
3-Month CP	6.40%	6.35%	6.56%	6.45%	7.25%	7.48%
6-Month CP	6.65%	6.60%	6.72%	6.55%	7.55%	7.65%
1-year CP	6.85%	6.80%	6.92%	6.80%	7.45%	7.80%
1-year Gilt	5.51%	5.51%	5.58%	5.64%	6.40%	6.65%
3-year Gilt	5.77%	5.77%	5.90%	6.07%	6.44%	6.66%
5-year Gilt	6.22%	6.18%	6.16%	6.22%	6.45%	6.68%
1-year AAA	6.67%	6.65%	6.64%	6.77%	7.29%	7.53%
3-year AAA	6.77%	6.75%	6.83%	6.89%	7.11%	7.29%
5-year AAA	6.84%	6.82%	6.87%	6.94%	7.11%	7.24%
10-year G-sec	6.56%	6.52%	6.52%	6.46%	6.58%	6.74%
Net LAF (Rs Cr)	215352	209376	240961	236007	-9354	61154
Forex reserves (\$ bn)	686.23	688.10	689.73	694.23	642.49	658.09

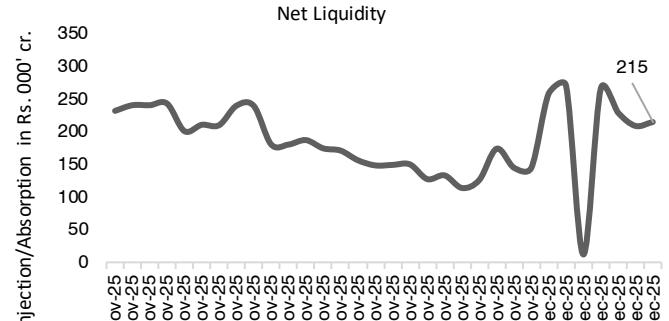
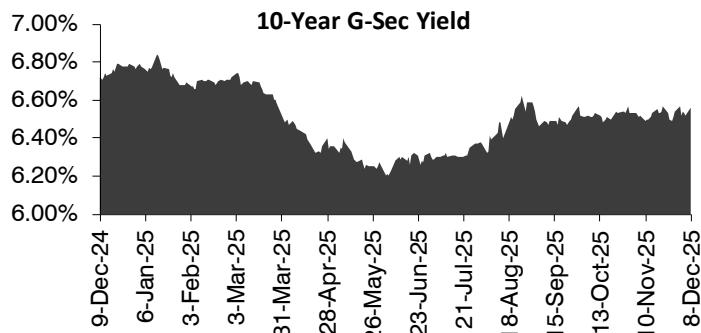
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.43	6.46	7.19	7.22	8.47	8.95
1 Year	5.51	6.67	7.40	7.43	8.68	9.16
3 Year	5.77	6.77	7.50	7.53	8.78	9.26
5 Year	6.22	6.84	7.66	7.70	8.94	9.42
10 Year	6.56	7.12	7.94	7.98	9.22	9.70

Rs. Cr (Debt)	FII Inv		MF Inv
	5-Dec	3-Dec	
Buy	220		29,057
Sell	474		28,347
Net	-254		710
Net (MTD)	312		-5,194
Net (YTD)	8,582		-553,240

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	0.25% (Oct'25)	1.61% (Jul'25)	6.21% (Oct'24)
WPI	-1.21% (Oct-25)	-0.58% (Jul-25)	2.36% (Oct-24)
IIP	0.4% (Oct-25)	4.3% (Jul-25)	3.7% (Oct-24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
India Manufacturing PMI	57.4 (Nov-25)	59.3 (Aug-25)	56.5 (Nov-24)
India Service PMI	59.5 (Nov-25)	62.9 (Aug-25)	58.4 (Nov-24)
Bank Credit Growth*	-0.23% (Nov 14, 2025)	1.22% (Oct 31, 2025)	
Bank Deposit Growth*	0.33% (Nov 14, 2025)	0.93% (Oct 31, 2025)	

Capital markets

- EAAA Alternatives plans to raise up to \$1.5 billion (up to Rs 13,500 crore) for medium- to long-term investments in segments such as industrial products and manufacturing, automobiles, chemicals and pharma.
- Frex raised Rs 9.5 crore in a pre-seed funding round jointly led by Zeropearl VC and White Venture Capital.
- ACS Energy raised Rs 1.1 Crore in pre-seed funding from Inflection Point Ventures (IPV).
- AceVector filed its updated draft red herring prospectus (UDRHP) after securing approval from the Securities and Exchange Board of India (Sebi) for its initial public offering (IPO).
- SPML Infra bagged a Rs 207 crore joint venture project from the Public Health Engineering Department of Rajasthan.
- Dr. Reddy's Laboratories secured an exclusive licensing agreement with Immutep to manufacture, develop, and distribute the Australian company's cancer therapy, eftilagimod alfa valued at up to \$350 million.
- Wise launched multi-currency travel card in India as outbound travel hits new high.
- HFCL secured a \$72.96 million (Rs 656.10 crore) export order to supply optical fiber cables through its overseas subsidiary to a major international customer, with deliveries due by November 2026.



Global market indices	8-Dec	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47739.32	-0.45	1.60	13.66	6.94
Nikkei 225	50581.94	0.18	0.61	42.01	29.39
FTSE	9645.09	-0.23	-0.39	12.38	16.09
Hang Seng	25765.36	-1.23	-1.82	11.44	29.70
Taiwan	28303.78	1.15	2.36	36.76	22.03

Global debt	8-Dec	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.17	4.14	4.11	4.05	4.23	4.15
UK 10-Year (%)	4.53	4.48	4.47	4.61	4.68	4.28
German 10-Year (%)	2.87	2.80	2.67	2.64	2.73	2.11
Japan 10-Year (%)	1.98	1.95	1.68	1.55	1.49	1.05

Domestic	8-Dec	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	128257	-0.26	6.79	43.84	68.34
Silver (Rs / Kg)	179088	0.49	20.81	77.50	97.19
Aluminium (Rs / Kg)	280	-0.07	2.56	11.61	14.18
Copper (Rs / kg)	1100	0.53	9.84	22.45	33.81
Lead (Rs / kg)	185	-2.79	0.33	-0.94	-0.70
Zinc (Rs / Kg)	322	-0.20	3.69	17.22	9.78
Nickel (Rs / kg)	1347	0.31	0.56	-4.81	-1.74

Global	8-Dec	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4197.81	-0.36	5.38	35.37	59.93
Silver (oz/\$)	5840.00	2.37	21.21	71.16	88.08
Brent (\$/bbl)	62.49	-1.98	-1.79	-16.42	-12.13
NYMEX crude (\$/bbl)	58.88	-2.00	-1.46	-17.63	-12.38

Global markets

- Wall Street stocks closed lower on Monday as investors were cautious ahead of the Fed's policy decision and rising treasury yields.
- 10-year US bond yield ended higher at 4.17% as traders looked ahead to the last Federal Reserve policy meeting of the year.
- FTSE index closed lower on Monday due to caution ahead of interest rate decisions from the US Federal Reserve and the Bank of England.
- Asian markets were trading mostly higher at 8.30 AM.
- US Consumer Inflation Expectations unchanged at 3.2% in November compared to October 2025.
- UK retail sales rose 1.2% on year November 2025, the slowest pace in six months, from 1.5% in previous month.
- China trade surplus topped a record \$1 trillion in the first 11 months of the year despite a deepening slump in shipments to the US with exports rising 5.4% while imports shrank 0.6%.
- Japan Economy Watchers Survey Outlook decreased to 50.30 in November compared to 53.10 in October 2025.

Commodity

- Crude oil prices fell by \$1.20 to \$58.88 a barrel on the NYMEX after Iraq restored output at a key oilfield and ongoing Russia-Ukraine peace talks.
- Domestic gold prices fell marginally due to strong dollar index.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Dec 9	US Nonfarm Productivity QoQ Final Q3	3.3%
Dec 10	Japan PPI, Nov	2.7%
Dec 12	UK GDP, Oct	1.1%
Dec 13	India WPI Inflation, Nov	-1.21%
Dec 16	India HSBC Services PMI Flash, Dec	59.8

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

*Note: Bank credit and deposit growth are calculated on fortnightly basis. #flash PMI numbers

	Indicators	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25	Feb-25	Jan-25
Debt Indicators	Currency in circulation (Rs billion)	38184	38071	38097	38147	38372	38344	37762	36997	36444	35893
	Repo rate	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%	6.25%	6.50%
	10-year G-sec yield	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%	6.72%	6.69%
	Call rate	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%	6.50%	6.65%
	Forex reserves (\$ billion; mthly. avg.)	699	701	693	698	699	689	682	656	638	629
Economy Indicators	GDP	NA	NA	7.80%			7.40%			6.40%	
	Fiscal deficit (Rs billion)	NA	-250.3	1297.37	1876.84	2675.69	-1731.69	1863.32	2304.18	1773.1	2554.5
	IIP, %y/y	NA	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%	2.90%	5.00%
	Exports, \$ billion	NA	36.38	35.1	37.24	35.14	38.73	38.49	41.97	36.91	36.43
	Imports, \$ billion	NA	68.53	61.59	64.59	53.92	60.61	64.91	63.51	50.96	59.42
	Manufacturing PMI	59.2	57.7	59.3	59.1	58.4	57.6	58.2	58.1	56.3	57.7
	Services PMI	58.8	60.9	62.9	60.5	60.4	58.8	58.7	58.5	59	56.5
	GST collections (Rs crore)	195936	189017	186315	195735	184597	201050	236716	196141	183646	195506
	India crude oil import (mbpd)	NA	19.934	19.6	18.56	20.32	21.3	21.0	22.7	19.1	21.2
Sector update	Auto – Passenger vehicles	NA	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%	2.4%	2.4%	1.8%
	Auto – Two-wheelers	NA	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%	-9.0%	2.1%
	Auto – Commercial vehicles	NA	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%	-3.3%	0.6%
	Auto – Tractors	NA	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%	25.40%	13.60%	11.39%
	Infra – Coal	NA	-1.20%	11.40%	-12.30%	-6.80%	2.8%	3.5%	1.6%	1.7%	4.6%
	Infra – Electricity	NA	2.1%	3.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%	3.6%	2.3%
	Infra – Steel	NA	14.10%	14.20%	16.60%	9.70%	7.4%	4.4%	8.7%	6.9%	4.7%
	Infra – Cement	NA	5.30%	6.10%	11.60%	8.20%	9.7%	6.3%	12.2%	10.7%	14.3%

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