

Domestic Market Performance

Indian market indices	13-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	25471	-1.30	-1.02	8.30	10.59
BSE Sensex	82627	-1.25	-1.20	6.73	8.52
BSE 100	26695	-1.30	-0.85	8.61	11.13
BSE 200	11556	-1.36	-0.56	8.98	11.46
BSE 500	36532	-1.40	-0.74	8.79	11.06
BSE SmallCap	49279	-1.58	-1.05	5.66	5.00
BSE MidCap	45705	-1.68	-0.73	10.05	12.06
BSE LargeCap	9831	-1.32	-0.48	8.83	11.32
Sectoral indices					
BSE IT	31591	-1.66	-14.36	-12.54	-22.20
BSE Oil & Gas	28595	-1.86	4.10	13.77	20.38
BSE FMCG	18734	-1.74	-2.61	-3.67	-3.02
BSE Auto	62589	-0.94	1.00	31.20	25.13
BSE Bankex	67476	-0.87	0.87	13.32	20.24
BSE Teck	16920	0.72	-7.96	-2.48	-10.41
BSE Capital Goods	68243	-1.16	5.62	8.80	15.71
BSE Consumer Durable	58880	-1.46	-4.17	8.27	5.09

Turnover (Rs Cr)	13-Feb	12-Feb
BSE Cash	9424	10469
NSE Cash	123599	119233
NSE F&O	18803277	9863185

Rs. Cr (Equity)	FII Inv 12-Feb	MF Inv 9-Feb	DII Inv 13-Feb
Buy	19,040	10,380	20,606
Sell	18,137	10,773	15,052
Net	903	-393	5,554
Net (MTD)	19,675	-5,142	9,776
Net (YTD)	-14,023	37,212	72,105

	13-Feb	1Day	Month ago	Year ago
USD	90.74	90.59	90.27	86.88
GBP	123.45	123.36	121.57	108.56
Euro	107.62	107.45	105.23	90.67
100 Yen	59.20	59.10	56.81	56.40

Indian markets

- Indian equity benchmarks closed lower on Friday, owing to a sharp sell-off in information technology (IT) stocks amid rising concerns over artificial intelligence (AI)-led disruption.
- The top losers were Hindalco, Hindustan Unilever, Eternal, Adani Enterprises and ONGC, down 3.20-6.08%.
- The top gainers were Bajaj Finance, Eicher Motors, SBI Life Insurance, SBI and Cipla, up 0.13-3.09%.

Indian debt

- The interbank call-money rate ended higher at 5.05% on Friday compared to 4.60% on Thursday.
- Government bond prices were flat on Friday as demand-supply worries resurfaced after a brief boost from a debt switch.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.68% on Friday.

Indian Rupee

- The rupee weakened against the United States (US) dollar on Friday, dragged down by a stronger dollar index.

Regulatory

- The Reserve Bank of India has allowed lenders to fund up to 20% of their capital for these deals opening new credit growth avenues for Indian banks.
- The Securities and Exchange Board of India floated a consultation paper proposing a comprehensive review of base price determination and price band norms for exchange-traded funds (ETFs), citing concerns over misalignment with underlying assets and operational risks under the existing framework.
- TRAI launched revamped versions of its apps, 'Do Not Disturb (DND) and MySpeed' to reduce spam and unsolicited calls and messages and help improve service quality.
- PFRDA Chairperson Sivasubramanian Ramann said the Pension Fund Regulatory and Development Authority (PFRDA) is pushing for higher equity exposure and a gradual expansion of permissible asset classes under the National Pension System (NPS) as it looks to sustain long-term returns in a declining interest rate environment.

Economy and Government

- India's foreign exchange reserves declined to \$717.06 billion as of February 6, down from \$723.77 billion recorded in the previous week.
- The government approved the second tranche of Startup India Fund of Funds Scheme with a corpus of Rs 10,000 crore.
- The government approved exports of 2.5 million tonnes of wheat and an additional 500,000 tonnes each of wheat products and sugar, lifting a ban imposed on wheat more than three years ago.

Domestic Debt Market Indicators

Instrument	13-Feb	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.05%	4.60%	5.50%	5.30%	7.00%	5.80%
3-Month T-Bill	5.27%	5.28%	5.32%	5.41%	6.34%	6.43%
6-Month T-Bill	5.47%	5.52%	5.54%	5.54%	6.47%	6.53%
1-year T-Bill	5.54%	5.55%	5.55%	5.53%	6.40%	6.53%
3-Month CD	6.70%	6.85%	6.68%	5.95%	7.00%	7.41%
6-Month CD	6.92%	6.99%	6.95%	6.22%	7.25%	7.60%
1-year CD	6.82%	6.90%	6.95%	6.39%	7.15%	7.56%
3-Month CP	7.35%	7.45%	7.03%	6.55%	7.25%	7.75%
6-Month CP	7.40%	7.50%	7.17%	6.68%	7.55%	7.90%
1-year CP	7.30%	7.35%	7.22%	6.85%	7.45%	7.88%
1-year Gilt	5.70%	5.73%	5.66%	5.59%	6.40%	6.62%
3-year Gilt	5.95%	5.98%	5.90%	5.90%	6.44%	6.64%
5-year Gilt	6.43%	6.45%	6.40%	6.17%	6.45%	6.69%
1-year AAA	6.97%	7.01%	7.03%	6.60%	7.29%	7.49%
3-year AAA	7.12%	7.16%	7.03%	6.75%	7.11%	7.30%
5-year AAA	7.19%	7.23%	7.24%	6.82%	7.11%	7.24%
10-year G-sec	6.68%	6.69%	6.63%	6.51%	6.58%	6.71%
Net LAF (Rs Cr)	303148	286404	100542	240251	-9354	-241835
Forex reserves (\$ bn)	717.06	723.77	686.80	689.73	642.49	630.61

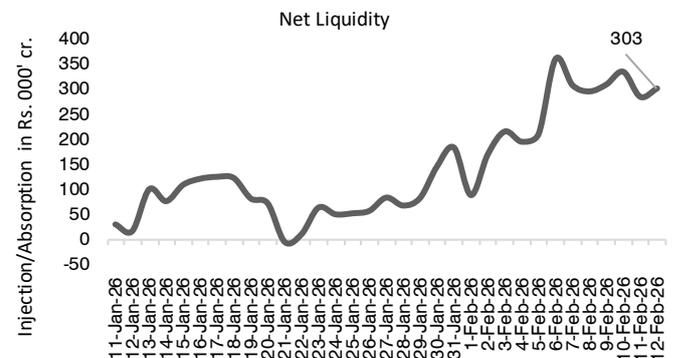
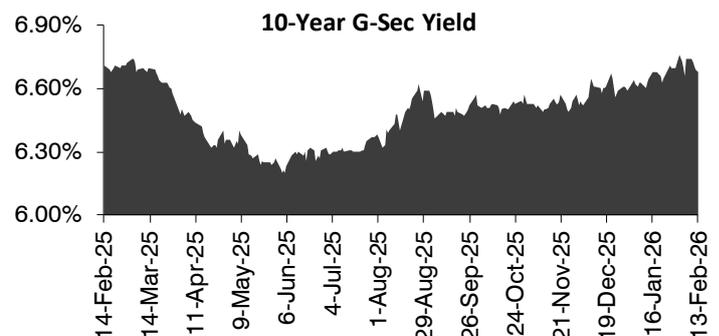
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.47	7.12	7.86	7.91	9.14	9.62
1 Year	5.70	6.97	7.71	7.76	8.99	9.47
3 Year	5.95	7.12	7.86	7.91	9.14	9.62
5 Year	6.43	7.19	8.03	8.08	9.31	9.79
10 Year	6.68	7.35	8.19	8.24	9.47	9.95

Rs. Cr (Debt)	FII Inv 12-Feb	MF Inv 9-Feb
Buy	858	14,220
Sell	117	19,470
Net	741	-5,250
Net (MTD)	1,218	-36,338
Net (YTD)	-5,059	-127,145

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
WPI	0.83% (Dec-25)	0.13% (Sep-25)	2.37% (Dec-24)
IIP	7.8% (Dec'25)	4.6% (Sep'25)	3.7% (Dec'24)
GDP	8.2% (Jul-Sep FY26)	7.8% (Apr-Jun FY26)	5.6% (Jul-Sep FY25)
India Manufacturing PMI	55.4 (Jan-26)	59.2 (Oct-25)	57.7 (Jan-25)
India Service PMI	58.5 (Jan-25)	58.8 (Oct-25)	56.5 (Jan-25)
Bank Credit Growth*	-1.45% (Jan 15, 2026)		3.02% (Dec 31, 2025)
Bank Deposit Growth*	-0.94% (Jan 15, 2026)		3.91% (Dec 31, 2025)

Capital markets

- Attero Recycling plans to invest around Rs 7,000 crore over the next five years in refining and processing facilities under the Centre's proposed rare-earth and critical mineral corridor plan.
- KLA signed an agreement with Tamil Nadu's government to invest approximately Rs 3,600 crore to establish a global R&D and innovation hub in Chennai.
- Transrail Lighting announced that it has won new EPC contracts worth Rs 2,350 crore in the domestic market.
- Indian Railways has collaborated with Jindal Stainless to produce stainless steel containers for salt in India.



Global market indices	13-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49500.93	0.10	0.63	17.85	10.71
Nikkei 225	56941.97	-1.21	6.34	59.87	44.30
FTSE	10446.35	0.42	3.05	21.71	19.19
Hang Seng	26567.12	-1.72	-1.05	14.91	21.79
Taiwan	Closed	NA	NA	NA	NA

Global debt	13-Feb	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.04	4.09	4.18	4.11	4.23	4.52
UK 10-Year (%)	4.42	4.45	4.40	4.44	4.68	4.49
German 10-Year (%)	2.76	2.78	2.81	2.69	2.73	2.42
Japan 10-Year (%)	2.21	2.23	2.18	1.69	1.49	1.34

Domestic	13-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	152765	-1.85	8.90	71.33	78.16
Silver (Rs / Kg)	242433	-6.44	-7.83	140.29	153.73
Aluminium (Rs / Kg)	308	-2.03	-2.53	22.83	19.57
Copper (Rs / kg)	1236	-1.85	-1.47	37.59	44.14
Lead (Rs / kg)	195	0.00	0.54	4.53	2.20
Zinc (Rs /Kg)	327	-2.03	3.52	19.01	20.15
Nickel (Rs / kg)	1576	-2.83	-3.18	11.35	16.51

Global	13-Feb	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4926.97	-2.89	6.98	58.88	69.79
Silver (oz/\$)	7583.00	-9.87	-10.97	122.25	135.28
Brent (\$/bbl)	67.75	0.34	3.48	-9.39	-9.69
NYMEX crude (\$/bbl)	62.89	0.08	2.85	-12.02	-11.78

Global markets

- Wall Street stocks ended mixed on Friday with Dow Jones gaining due to cooler inflation data while Nasdaq ended lower dragged down by technology and communication stocks from persistent concerns over AI-led disruption.
- 10-year US bond yield ended lower at 4.04% due to softer-than-expected January inflation data.
- FTSE index ended marginally higher on Friday supported by expectations of monetary policy easing.
- Asian markets were trading mostly lower at 8.30 AM.
- US annual inflation rate slowed to 2.4% in January 2026, compared to 2.7% in December 2025 while the annual core consumer price inflation rate edged down to 2.5% from 2.6%.
- The Eurozone economy expanded by 1.3% year-on-year in the fourth quarter of 2025, compared to 1.4% in the third quarter of 2025.
- Eurozone trade surplus narrowed to €12.6 billion in December 2025 compared to €13.9 billion a year earlier as imports grew faster than exports, pointing to softer external balance despite rising trade activity.
- China Outstanding loans growth eased to 6.1% in January 2026 compared to 6.4% in December 2025.
- The Japanese economy grew at an annualized pace of 0.2% in Q4 2025, compared to a revised 2.6% contraction in the previous quarter.

Commodity

- Crude oil prices rose marginally by 5 cents to \$62.89 a barrel on the NYMEX after softer U.S. inflation data supported sentiment, offsetting concerns that OPEC+ may resume production increases.
- Domestic gold prices fell due to profit booking amid rising geopolitical uncertainties.

Forthcoming results

Date	Company
13-Feb	Siemens Energy India Limited
13-Feb	Torrent Pharmaceuticals Ltd.
19-Feb	ABB India Limited

Upcoming market indicators

Date	Indicator	Previous
Feb 16	Japan Industrial Production, Dec	-2.2%
Feb 17	UK Unemployment Rate Dec	5.1%
Feb 18	UK Inflation Rate, Jan	3.4%
Feb 20	India Foreign Exchange Reserves Feb/13	-
Feb 24	China Loan Prime Rate 1Y/5Y Feb	3% / 3.5%

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		Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25
Debt Indicators	Currency in circulation (Rs billion)	39800	39079	38551	38184	38071	38097	38147	38372	38344	37762
	Repo rate	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%
	10-year G-sec yield	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%
	Call rate	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%
	Forex reserves (\$ billion; mthly. avg.)	696	692	688	699	701	693	698	699	689	682
GDP	GDP	NA	NA	7.80%	7.80%	7.40%	7.40%	6.40%	6.40%	6.40%	6.40%
	Fiscal deficit (Rs billion)	NA	-120829	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32
	IIP, %y/y	NA	7.80%	6.70%	0.40%	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%
	Exports, \$ billion	NA	38.51	38.13	34.38	36.38	35.1	37.24	35.14	38.73	38.49
	Imports, \$ billion	NA	63.55	62.66	76.06	68.53	61.59	64.59	53.92	60.61	64.91
	Manufacturing PMI	55.4	55	56.6	59.2	57.7	59.3	59.1	58.4	57.6	58.2
	Services PMI	58.5	58	59.8	58.8	60.9	62.9	60.5	60.4	58.8	58.7
	GST collections (Rs crore)	193384	174550	170276	195936	189017	186315	195735	184597	201050	236716
	India crude oil import (mbpd)	NA	21.59	21.24	21.01	20.21	19.60	18.89	20.32	21.3	21.0
Sector update	Auto – Passenger vehicles	NA	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%
	Auto – Two-wheelers	NA	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%
	Auto – Commercial vehicles	NA	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%
	Auto – Tractors	NA	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%
	Infra – Coal	NA	3.60%	2.10%	-8.50%	-1.20%	11.40%	12.30%	-6.80%	2.8%	3.5%
	Infra – Electricity	NA	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%	-1.20%	-4.7%	1.7%
	Infra – Steel	NA	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%	9.70%	7.4%	4.4%
	Infra – Cement	NA	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%	8.20%	9.7%	6.3%

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