

## Domestic Market Performance

Indian market indices	6 March	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24450	-1.27	-4.84	3.96	8.45
BSE Sensex	78919	-1.37	-5.58	1.94	6.16
BSE 100	25663	-1.16	-4.62	4.42	9.05
BSE 200	11140	-1.07	-4.24	5.06	9.64
BSE 500	35232	-0.98	-4.08	4.92	9.41
BSE SmallCap	46882	-0.26	-4.09	0.52	3.57
BSE MidCap	44131	-0.73	-3.88	6.26	10.30
BSE LargeCap	9481	-1.11	-4.16	4.95	9.57
Sectoral indices					
BSE IT	29219	-0.09	-14.94	-19.11	-22.10
BSE Oil & Gas	28161	-0.50	-3.42	12.05	18.25
BSE FMCG	18279	-0.22	-3.81	-6.01	-3.00
BSE Auto	59830	-1.10	-2.21	25.42	27.38
BSE Bankex	64991	-2.14	-3.79	9.15	17.01
BSE Teck	15443	-0.57	-12.44	-10.99	-11.96
BSE Capital Goods	70618	1.30	4.23	12.59	20.44
BSE Consumer Durable	57385	-0.60	-0.58	5.52	5.14

Turnover (Rs Cr)	6 March	6 March
BSE Cash	8028	9258
NSE Cash	110554	124023
NSE F&O	15311726	10928344

Rs. Cr (Equity)	FII Inv 5 March	MF Inv 5 March	DII Inv 6 March
Buy	15,796	9,040	19,662
Sell	19,226	7,155	12,691
Net	-3,430	1,885	6,972
Net (MTD)	-15,532	17,308	32,787
Net (YTD)	-32,082	70,102	133,382

	6 March	1Day	Month ago	Year ago
USD	91.68	91.63	90.42	87.09
GBP	122.49	122.05	122.74	112.33
Euro	106.41	106.26	106.69	94.09
100 Yen	58.08	58.31	57.64	58.50

## Indian markets

- Indian equity benchmarks ended lower on Friday, dragged down by losses in banking stocks amid mounting geopolitical tensions in the Middle East and rising crude oil prices.
- The top losers were ICICI Bank, Eternal, Shriram Finance, SBI and Axis Bank, down 2.54-3.13%.
- The top gainers were Bharat Electronics Ltd, ONGC, Reliance, NTPC and Hindalco, up 0.59-2.52%.

## Indian debt

- The interbank call-money rate ended higher at 5.15% on Friday compared to 4.85% on Thursday.
- Government bond prices fell on Friday as rising crude prices, following Middle East tensions, heightened inflation concerns for India.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended higher at 6.69% on Friday compared to 6.64% on Thursday.

## Indian Rupee

- The rupee closed lower against the US dollar on Friday, pressured by foreign fund outflows and escalating geopolitical uncertainties.

## Regulatory

- The Reserve Bank of India (RBI) issued new draft guidelines for customer protection in electronic banking transactions, including online and card-based payments.

## Economy and Government

- According to the latest data released by the Reserve Bank of India (RBI) India's foreign exchange reserves went up by \$4.88 billion to reach record high of \$728.5 billion in the week ending February 27 compared to \$723.6 billion in the previous week.
- Environment Minister Bhupender Yadav has said India and Finland renewed their MoU on environmental cooperation to deepen collaboration on pollution prevention and control, waste management, climate change, forests and natural resource management.

## Domestic Debt Market Indicators

Instrument	6 March	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.15%	4.85%	4.45%	5.35%	7.00%	5.75%
3-Month T-Bill	5.31%	5.30%	5.34%	5.25%	6.34%	6.46%
6-Month T-Bill	5.51%	5.51%	5.55%	5.45%	6.47%	6.57%
1-year T-Bill	5.60%	5.58%	5.65%	5.45%	6.40%	6.54%
3-Month CD	7.10%	7.15%	7.00%	5.87%	7.00%	7.54%
6-Month CD	7.05%	7.05%	7.05%	6.22%	7.25%	7.69%
1-year CD	6.94%	6.95%	6.98%	6.40%	7.15%	7.66%
3-Month CP	7.60%	7.60%	7.50%	6.35%	7.25%	7.80%
6-Month CP	7.55%	7.55%	7.57%	6.60%	7.55%	7.88%
1-year CP	7.27%	7.40%	7.47%	6.80%	7.45%	7.90%
1-year Gilt	5.65%	5.60%	5.72%	5.51%	6.40%	6.58%
3-year Gilt	6.00%	5.91%	6.01%	5.77%	6.44%	6.55%
5-year Gilt	6.34%	6.32%	6.52%	6.18%	6.45%	6.60%
1-year AAA	7.13%	7.12%	7.19%	6.65%	7.29%	7.57%
3-year AAA	7.23%	7.20%	7.22%	6.75%	7.11%	7.38%
5-year AAA	7.28%	7.27%	7.28%	6.82%	7.11%	7.34%
10-year G-sec	6.69%	6.65%	6.74%	6.52%	6.58%	6.68%
Net LAF (Rs Cr)	302440	267460	362476	229612	-9354	-56909
Forex reserves (\$ bn)	728.49	723.61	723.77	686.23	642.49	640.48

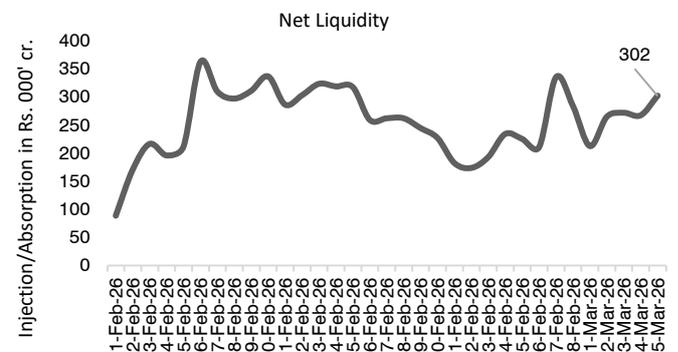
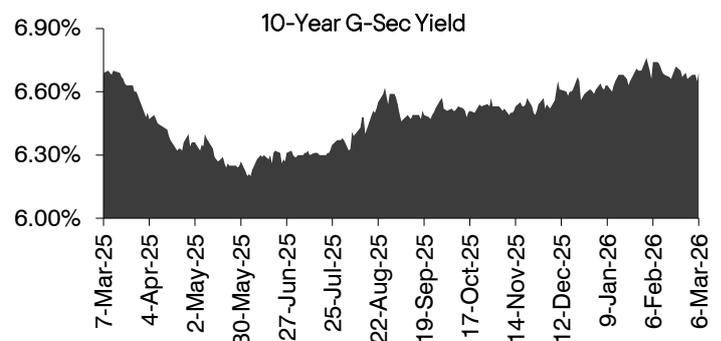
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.51	7.37	8.11	8.16	9.39	9.87
1 Year	5.65	7.13	7.87	7.92	9.15	9.63
3 Year	6.00	7.23	7.97	8.02	9.25	9.73
5 Year	6.34	7.28	8.12	8.17	9.40	9.88
10 Year	6.69	7.42	8.26	8.31	9.54	10.02

Rs. Cr (Debt)	FII Inv 5 March	MF Inv 5 March
Buy	3,436	14,318
Sell	3,530	20,623
Net	-94	-6,305
Net (MTD)	1,409	-13,063
Net (YTD)	-42	-197,548

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	2.75% (Jan'26)	0.25% (Oct'25)	4.26% (Jan'25)
WPI	1.81% (Jan'26)	-1.21% (Oct'25)	2.51% (Jan'25)
IIP	4.8% (Jan'26)	0.5% (Oct'25)	5.2% (Jan'25)
GDP	7.8% (Oct-Dec FY26)	8.4% (Jul-Sep FY26)	7.4% (Oct-Dec FY25)
India Manufacturing PMI	56.9 (Feb-26)	56.6 (Nov-25)	56.2 (Feb-26)
India Service PMI	59.3 (Jan-26)	60.9 (Sep-25)	56.5 (Jan-25)
Bank Credit Growth*	-0.43% (Feb 15, 2026)		1.56% (Jan 31, 2026)
Bank Deposit Growth*	-0.21% (Feb 15, 2026)		1.75% (Jan 31, 2026)

## Capital markets

- The Directorate General of Training (DGT) under the Ministry of Skill Development and Entrepreneurship (MSDE) signed a Flexible Memorandum of Understanding (Flexi-MoU) with Bajaj Auto Ltd. to train people in advanced automotive manufacturing under the revised Flexi-MoU Scheme (June 2024).
- Garden Reach Shipbuilders & Engineers Ltd. signed a MoU with Kalyani Strategic Systems Ltd. to jointly develop and promote indigenous advanced naval systems, unmanned platforms and maritime capabilities.



Global market indices	6 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	47501.55	-0.95	-5.22	13.09	11.56
Nikkei 225	55620.84	0.62	2.52	56.16	47.52
FTSE	10284.75	-1.24	-0.82	19.83	18.45
Hang Seng	25757.29	1.72	-3.02	11.41	5.69
Taiwan	33599.54	-0.22	5.72	62.35	47.92

Global debt	6 March	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.15	4.13	4.22	4.14	4.23	4.29
UK 10-Year (%)	4.63	4.55	4.52	4.48	4.68	4.67
German 10-Year (%)	2.86	2.85	2.85	2.80	2.73	2.88
Japan 10-Year (%)	2.16	2.15	2.24	1.95	1.49	1.50

Domestic	6 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	158751	-1.14	4.39	78.04	84.86
Silver (Rs / Kg)	260723	-1.32	6.45	158.42	170.29
Aluminium (Rs / Kg)	334	0.65	7.50	33.07	26.68
Copper (Rs / kg)	1231	0.98	0.50	37.05	39.96
Lead (Rs / kg)	195	-0.13	0.33	4.58	3.72
Zinc (Rs /Kg)	327	-0.98	1.11	19.23	18.19
Nickel (Rs / kg)	1619	0.24	3.88	14.39	15.67

Global	6 March	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	5150.30	0.52	5.81	66.08	76.41
Silver (oz/\$)	8454.00	0.88	9.22	147.77	159.33
Brent (\$/bbl)	92.69	8.52	36.21	23.97	33.44
NYMEX crude (\$/bbl)	90.90	12.21	43.04	27.17	36.98

## Global markets

- Wall Street stocks ended lower on Friday due to disappointing nonfarm payroll data for January and concerns over rising crude oil prices following geopolitical tensions.
- 10-year US bond yield ended higher at 4.15% as investors assessed the likely inflation impact resulting from higher crude oil prices.
- FTSE index declined on Friday as escalating geopolitical tensions raised inflation concerns and due to weak US jobs data.
- Asian markets were trading mostly lower at 8.30 AM.
- The US economy shed 92,000 jobs in February 2026, compared to a downwardly revised 126,000 rise in January 2026.
- US unemployment rate rose to 4.4% in February 2026, compared to 4.3% in January 2026.
- US Retail sales rose by 3.2% in January of 2026, compared to 2.4% increase in December 2025.
- The Eurozone economy grew 1.2% year-on-year in the fourth quarter of 2025, compared to a 1.4% expansion in the previous quarter.
- UK Halifax House Price Index house prices rose 1.3% year-on-year in February 2026, compared to a revised 1.1% increase in January 2026.
- China annual inflation jumped to 1.3% in February 2026 compared to 0.2% in January 2026.
- China producer prices fell 0.9% year-on-year in February 2026, compared to a 1.4% decline in January 2026.

## Commodity

- Crude oil prices rose by \$9.89 to \$90.90 a barrel on the NYMEX after Qatar's energy minister said that country expects all Gulf energy producers to shut down exports within weeks.
- Domestic gold prices declined due to strong dollar index.

## Forthcoming results

NA	NA
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## Upcoming market indicators

Date	Indicator	Previous
Mar 9	China Inflation Rate, Feb	0.2%
Mar 10	Japan GDP Growth Rate QoQ Final Q4	-0.6%
Mar 11	US CPI Feb	325.25
Mar 12	India Inflation Rate Feb	2.13%
Mar 13	US GDP Sales QoQ 2nd Est Q4	4.5%

**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	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	June-25	May-25	Apr-25	Mar-25
Debt Indicators	Currency in circulation (Rs billion)	39079	38512	38184	38071	38097	38147	38372	38344	37762	36997
	Repo rate	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%	6.00%	6.00%	6.25%
	10-year G-sec yield	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%	6.27%	6.36%	6.58%
	Call rate	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%	5.75%	6.00%	7.00%
	Forex reserves (\$ billion; mthly. avg.)	692	688	699	701	693	698	699	689	682	656
GDP	GDP	NA	NA	7.80%				7.40%		6.40%	
	Fiscal deficit (Rs billion)	NA	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69	1731.69	1863.32	2304.18
	IIP, %y/y	NA	6.70%	0.40%	4.00%	4.00%	3.50%	1.50%	1.20%	2.70%	3.90%
	Exports, \$ billion	NA	38.13	34.38	36.38	35.1	37.24	35.14	38.73	38.49	41.97
	Imports, \$ billion	NA	62.66	76.06	68.53	61.59	64.59	53.92	60.61	64.91	63.51
	Manufacturing PMI	55	56.6	59.2	57.7	59.3	59.1	58.4	57.6	58.2	58.1
	Services PMI	59.1	59.8	58.8	60.9	62.9	60.5	60.4	58.8	58.7	58.5
	GST collections (Rs crore)	174550	170276	195936	189017	186315	195735	184597	201050	236716	196141
	India crude oil import (mbpd)	NA	21.06	21.01	20.21	19.60	18.89	20.32	21.3	21.0	22.7
Sector update	Auto – Passenger vehicles	NA	18.59%	17.46%	0.20%	-6.90%	2.30%	-6.80%	-1.1%	5.9%	2.4%
	Auto – Two-wheelers	NA	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%	2.2%	-16.7%	11.4%
	Auto – Commercial vehicles	NA	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%	-1.0%	-2.1%	-1.0%
	Auto – Tractors	NA	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%	9.10%	7.70%	25.40%
	Infra – Coal	NA	2.10%	-8.50%	-1.20%	11.40%	12.30%	-6.80%	2.8%	3.5%	1.6%
	Infra – Electricity	NA	-2.2%	-6.9%	3.1%	4.1%	3.70%	-1.20%	-4.7%	1.7%	7.5%
	Infra – Steel	NA	6.10%	5.90%	14.40%	13.60%	16.60%	9.70%	7.4%	4.4%	8.7%
	Infra – Cement	NA	14.50%	5.20%	5.00%	5.40%	11.60%	8.20%	9.7%	6.3%	12.2%

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