

Daily Market Monitor

April 28, 2026

Domestic Market Performance

Indian market indices	27 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Yr % Chg
Nifty 50	24093	0.81	5.58	7.89	0.22
BSE Sensex	77304	0.83	5.06	7.44	-2.41
BSE 100	25543	0.96	6.73	9.13	1.71
BSE 200	11188	1.02	7.66	10.16	3.16
BSE 500	35751	1.14	8.55	11.09	4.05
BSE SmallCap	51730	2.10	16.43	19.69	7.76
BSE MidCap	46599	1.40	12.00	14.95	9.57
BSE LargeCap	9445	0.94	6.99	9.45	2.23
Sectoral indices					
BSE IT	28225	2.08	-0.78	1.07	-19.08
BSE Oil & Gas	27345	1.13	6.59	6.98	6.21
BSE FMCG	18914	0.80	10.64	12.76	-7.91
BSE Auto	57642	1.69	7.00	9.56	17.04
BSE Bankex	63411	0.35	7.81	12.07	1.87
BSE Teck	14780	1.46	-1.76	0.36	-13.81
BSE Capital Goods	77873	1.02	18.52	21.22	26.60
BSE Consumer Durable	60212	1.91	12.10	14.43	5.64

Turnover (Rs Cr)	27 Apr	24 Apr
BSE Cash	9847	9236
NSE Cash	131256	130943
NSE F&O	23233094	14425373

Rs. Cr (Equity)	FII Inv 24 Apr	MF Inv 20 Apr	DII Inv 27 Apr
Buy	10,024	14,177	19,978
Sell	18,745	12,047	15,854
Net	-8,722	2,130	4,124
Net (MTD)	-52,689	13,491	43,603
Net (YTD)	-181,546	165,031	287,158

	27 Apr	1Day	Month ago	Year ago
USD	94.22	94.30	94.60	85.58
GBP	127.53	126.95	126.20	113.82
Euro	110.47	110.14	109.16	97.12
100 Yen	59.14	59.02	59.26	59.61

Indian markets

- Indian equity benchmarks ended higher on Monday due to optimism around easing geopolitical tensions, along with strong buying in IT and pharma stocks.
- The top gainers were Sun Pharmaceutical Industries, Jio Financial Services, Reliance Industries, Tech Mahindra and Wipro, up 2.82% - 6.83%.
- The top losers were Shriram Finance, Axis Bank, Bharat Electronics, Tata Consumer Products and Trent, down 0.96% - 3.69%.

Indian debt

- The interbank call-money rate ended higher at 5.15% on Monday compared to 5.11% on Friday.
- Government bond prices ended flat on Monday as volatile crude oil prices and global uncertainties kept investors cautious, while the lack of major domestic triggers led to range-bound trading.
- The yield of the new 10-year benchmark 06.48% GS 2035 paper ended flat at 6.94% on Monday.

Indian Rupee

- The rupee ended higher against the United States (US) dollar on Monday, supported by likely intervention by the Reserve Bank of India via state-run banks and a relatively softer US dollar.

Regulatory

- The Reserve Bank of India (RBI) has issued final guidelines linking capital requirements to borrower risk profiles for retail, corporate, and sovereign exposures, effective April 1, 2027, to optimize capital allocation across the banking system.
- The Reserve Bank of India issued final rules for asset classification and provisioning by lenders, after a draft set of proposals was issued in October last year.
- The Telecom Regulatory Authority of India (TRAI) has released a consultation paper aimed at expanding public Wi-Fi networks across the country. The document invites feedback from stakeholders on strategies to accelerate deployment, improve the sustainability of these networks, and promote greater user adoption throughout India.

Economy and Government

- The Ministry of Statistics and Programme Implementation has proposed creating an Index of Services Production (ISP) for the formal sector using GST data, with 2024-25 as the base year.

Domestic Debt Market Indicators

Instrument	27 Apr	1D ago	1M ago	3 M ago	FYTD ago	Year ago
Call rate	5.15%	5.11%	5.50%	5.40%	7.00%	5.90%
3-Month T-Bill	5.23%	5.23%	5.45%	5.47%	5.40%	5.89%
6-Month T-Bill	5.40%	5.46%	5.51%	5.55%	5.51%	5.93%
1-year T-Bill	5.57%	5.57%	5.65%	5.70%	5.70%	5.94%
3-Month CD	6.32%	6.25%	7.55%	7.08%	7.35%	6.45%
6-Month CD	6.90%	6.85%	7.45%	7.08%	7.30%	6.66%
1-year CD	7.15%	7.06%	7.25%	7.08%	7.25%	6.72%
3-Month CP	6.90%	6.75%	7.90%	7.55%	7.75%	6.80%
6-Month CP	7.23%	7.20%	7.85%	7.58%	7.65%	7.02%
1-year CP	7.55%	7.44%	7.62%	7.55%	7.60%	7.09%
1-year Gilt	5.86%	5.85%	5.79%	5.79%	5.82%	5.99%
3-year Gilt	6.31%	6.33%	6.39%	5.97%	6.43%	6.07%
5-year Gilt	6.68%	6.69%	6.76%	6.44%	6.90%	6.14%
1-year AAA	7.32%	7.29%	7.52%	7.19%	7.57%	6.97%
3-year AAA	7.60%	7.60%	7.59%	7.28%	7.59%	6.98%
5-year AAA	7.65%	7.64%	7.67%	7.33%	7.67%	6.99%
10-year G-sec	6.94%	6.94%	6.94%	6.71%	7.02%	6.36%
Net LAF (Rs Cr)	291505	289962	114351	83687	245161	101999
Forex reserves (\$ bn)	703.31	700.95	698.35	701.36	642.49	686.15

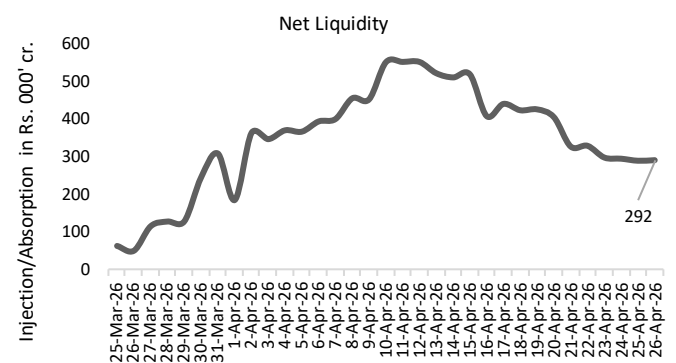
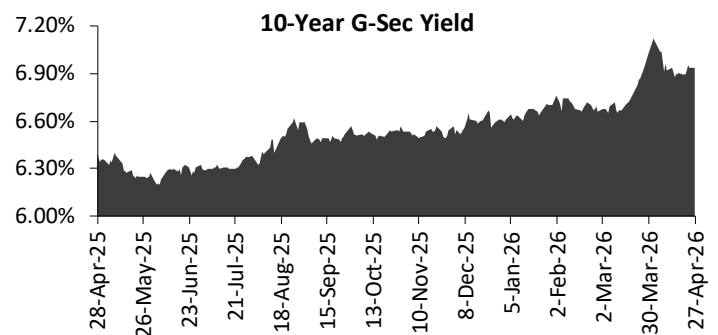
Yields (%)	G-sec	AAA	AA+	AA	AA-	A+
6 months	5.40	7.07	7.81	7.86	9.09	9.57
1 Year	5.86	7.32	8.06	8.11	9.34	9.82
3 Year	6.31	7.60	8.34	8.39	9.62	10.10
5 Year	6.68	7.65	8.49	8.54	9.77	10.25
10 Year	6.94	7.71	8.55	8.60	9.83	10.31

Rs. Cr (Debt)	FII Inv 24 Apr	MF Inv 20 Apr
Buy	714	15,463
Sell	574	16,339
Net	140	-876
Net (MTD)	-7,832	39,123
Net (YTD)	-2,425	-275,223

Economic Indicators	Latest	Quarter/Fortnight	Year Ago
CPI	3.40% (Mar'26)	1.33% (Dec'25)	3.34% (Mar'25)
WPI	3.88% (Mar'26)	0.83% (Dec'25)	2.25% (Mar'25)
IIP	5.2% (Feb-26)	7.2% (Nov-25)	2.7% (Feb-25)
GDP	7.8% (Oct-Dec FY26)	8.4% (Jul-Sep FY26)	7.4% (Oct-Dec FY25)
India Manufacturing PMI	53.9 (Mar-26)	55.0 (Dec-25)	58.1 (Mar-25)
India Service PMI	57.5 (Mar-26)	58.0 (Dec-25)	58.5 (Mar-25)
Bank Credit Growth*	4.87% (March 31, 2026)		-0.71% (March 15, 2026)
Bank Deposit Growth*	2.85% (March 31, 2026)		0.08% (March 15, 2026)

Capital markets

- Venture capital firm Capital-A announced the first close of its Fund II at Rs 160 crore. In all, the firm is targeting a base corpus of Rs 300 crore, with a green shoe option to upsize to Rs 400 crore.
- Monarch Network Capital raised Rs 100 crore for its maiden PMS fund via direct distribution.
- MobiKwik received a license to operate as a non-banking financial institution.
- Sun Pharmaceutical Industries to acquire NYSE-listed Organon & Co in an all-cash deal valuing the latter at an enterprise value of \$11.75 billion.
- Lodha Developers is planning to develop around 1 GW of build-to-suit data center power shell capacity across nearly 100 acres in Mumbai, with an estimated investment of Rs 10,000 to 11,000 crore.
- Transformers & Rectifiers (India) Ltd (TARIL) won export order worth Rs 150 crore from PDC AK LP IV LLC.
- RailTel Corporation of India received a Letter of Acceptance (LoA) worth Rs 145.5 crore from Eastern Coalfields.



Global market indices	27 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
DJIA	49167.79	-0.13	8.86	6.10	22.57
Nikkei 225	60537.36	1.38	13.42	18.55	69.55
FTSE	10321.09	-0.56	3.55	1.42	22.65
Hang Seng	25925.65	-0.20	3.90	4.59	17.95
Taiwan	39616.63	1.76	19.64	24.88	99.35

Global debt	27 Apr	1D ago	1M ago	3M ago	FYTD	1Y ago
US 10-Year (%)	4.35	4.31	4.44	4.24	4.30	4.29
UK 10-Year (%)	4.98	4.93	4.98	4.53	4.88	4.48
German 10-Year (%)	3.04	3.01	3.10	2.87	3.01	2.47
Japan 10-Year (%)	2.47	2.44	2.38	2.29	2.35	1.34

Domestic	27 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (Rs / 10 gm)	151186	-0.19	5.77	3.03	58.09
Silver (Rs / Kg)	243720	-0.04	9.96	5.90	149.50
Aluminium (Rs / Kg)	379	1.13	12.25	6.73	61.01
Copper (Rs / kg)	1292	2.40	10.14	10.30	51.47
Lead (Rs / kg)	201	-0.27	2.68	1.93	9.33
Zinc (Rs /Kg)	356	0.14	13.03	10.30	38.49
Nickel (Rs / kg)	1820	2.50	11.94	11.23	33.96

Global	27 Apr	1D % Chg	1M % Chg	FYTD % Chg	1Y % Chg
Gold (oz/\$)	4695.73	-0.22	7.14	3.71	42.81
Silver (oz/\$)	7562.00	0.27	11.48	7.31	128.67
Brent (\$/bbl)	108.23	2.75	-3.86	-8.55	61.85
NYMEX crude (\$/bbl)	96.37	2.09	-3.28	-4.94	52.92

Global markets

- Wall Street stocks ended mixed on Monday with the Nasdaq closing higher, driven by gains in technology stocks supported by strong earnings expectations, while the Dow Jones declined, dragged down by weakness in economically sensitive stocks amid caution over interest rates and global uncertainties.
- 10-year US bond yield ended higher at 4.35% ahead of the anticipated the Federal Reserve's upcoming monetary policy meeting.
- FTSE index closed lower on Monday dragged by losses in energy and consumer stocks and pressure ahead key central bank policy decisions this week.
- Asian markets were trading mostly higher at 8.30 AM.
- Eurozone construction output has contracted by 1.9% year-over-year in February 2026, extending the sector's downward trend following a steeper 4.1% decline in January 2026.

Commodity

- Crude oil prices rose by \$1.97 to \$96.37 a barrel on the NYMEX as tensions around the Strait of Hormuz raised concerns over potential supply disruptions.
- Domestic gold prices declined marginally due to profit booking ahead of key central bank decisions this week.

Forthcoming results

NA	NA
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Upcoming market indicators

Date	Indicator	Previous
Apr 28	India Industrial Production, Mar	5.2%
Apr 30	Japan Industrial Production YoY Prel, Mar	0.4%
May 1	US ISM Manufacturing PMI Apr	52.7
May 6	Euro PPI, Mar	-3%
May 7	US Consumer Inflation Expectations, Apr	3.4%

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		Mar-26	Feb-26	Jan-26	Dec-25	Nov-25	Oct-25	Sep-25	Aug-25	Jul-25	Jun-25
Debt Indicators	Currency in circulation (Rs billion)	41320	40445	39800	39079	38551	38184	38071	38097	38147	38372
	Repo rate	5.25%	5.25%	5.25%	5.25%	5.50%	5.50%	5.50%	5.50%	5.50%	5.50%
	10-year G-sec yield	7.02%	6.66%	6.70%	6.60%	6.54%	6.53%	6.57%	6.59%	6.38%	6.32%
	Call rate	7.00%	5.12%	4.80%	4.85%	5.50%	5.10%	5.00%	5.45%	4.95%	5.25%
	Forex reserves (\$ billion; mthly. avg.)	703	724	696	692	688	699	701	693	698	699
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	2712.42	1255.65	-1208.29	1515.27	2520.21	-250.3	1297.37	1876.84	2675.69
	IIP, %y/y	NA	5.20%	4.80%	8.00%	7.20%	0.50%	4.60%	4.10%	4.30%	1.50%
	Exports, \$ billion	NA	36.61	36.56	38.51	38.13	34.38	36.38	35.1	37.24	35.14
	Imports, \$ billion	NA	63.71	71.24	63.55	62.66	76.06	68.53	61.59	64.59	53.92
	Manufacturing PMI	53.90	56.9	55.4	55	56.6	59.2	57.7	59.3	59.1	58.4
	Services PMI	57.5	58.1	58.5	58	59.8	58.8	60.9	62.9	60.5	60.4
	GST collections (Rs crore)	200064	183609	193384	174550	170276	195936	189017	186315	195735	184597
	India crude oil import (mbpd)	NA	19.43	21.09	21.59	21.24	21.01	20.21	19.60	18.89	20.32
	Sector update	Auto – Passenger vehicles	NA	9.80%	12.20%	27.90%	18.59%	17.46%	0.20%	-6.90%	2.30%
Auto – Two-wheelers		NA	35.20%	26.20%	39.40%	21.17%	2.15%	6.66%	7.14%	8.70%	-3.40%
Auto – Commercial vehicles		NA	23.40%	27.30%	28.00%	24.16%	9.87%	25.67%	3.75%	4.60%	-6.00%
Auto – Tractors		NA	34.20%	43.00%	37.10%	30.08%	14.84%	45.39%	28.30%	8.00%	10.50%
Infra – Coal		NA	2.30%	3.10%	3.60%	2.10%	-8.50%	-1.20%	11.40%	-12.30%	-6.80%
Infra – Electricity		NA	0.50%	3.80%	5.30%	-1.5%	-6.9%	3.1%	4.1%	3.70%	-1.20%
Infra – Steel		NA	7.20%	9.90%	6.90%	6.70%	5.90%	14.40%	13.60%	16.60%	9.70%
Infra – Cement		NA	9.30%	10.70%	13.50%	14.60%	5.20%	5.00%	5.40%	11.60%	8.20%

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