



18 August 2025

INDIAN EQUITY MARKET

- Indian equity markets rose after the Indian Prime Minister unveiled plans for the biggest tax overhaul since 2017 over the weekend, boosting stocks across sectors such as automobiles, financials, real estate, consumer goods, and cement. With robust GST collections and a broad tax base, government sources indicated that nearly 90% of items in the 28% slab will be moved to 18%, while almost all goods in the 12% slab will shift to 5%, effectively making most essential goods and household items cheaper.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.84% and 1% to close at 81,273.75 and 24,876.95 respectively.
- The overall market breadth on BSE was weak with 1,695 scrips advancing and 2,263 scrips declining. A total of 167 scrips remained unchanged.

CORPORATE NEWS

- The Indian Hotels Company announced that it has signed an agreement with Madison, the hospitality platform of Terminus Group and JV Ventures, to develop ten new hotels under the Ginger brand across the southern states of India.
- JSW Steel Ltd and South Korea's Posco Group have signed a non-binding agreement to jointly explore the establishment of a 6 million tonnes per annum (MTPA) integrated steel plant in India through a 50:50 joint venture.
- IBM announced that the opening of its new India Client Experience Centre in Mumbai. As part of the facility's mission to support Indian enterprises in adopting AI, hybrid cloud, and quantum computing, the company signed a Letter of Intent (LoI) with the Government of Maharashtra to explore collaboration on the state's quantum initiatives.

EQUITY MARKET UPDATE

Indian Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty 50	24,877	1.00	-0.37	1.37	5.21	26,277	21,744	21.86	21.99
Nifty 100	25,492	1.05	-0.51	-0.34	4.07	27,336	22,177	21.71	22.56
Nifty 500	22,932	1.11	-1.48	-0.54	2.49	24,573	19,520	24.02	23.93
Nifty Midcap 100	57,113	1.08	-3.37	-0.94	-0.15	60,926	46,866	31.07	30.58
Nifty Smallcap 250	16,879	1.33	-5.75	-2.84	-4.92	18,688	13,315	32.15	26.06
Nifty SME Emerge	15,056	1.06	-1.17	-0.34	-9.34	17,224	11,930	26.07	44.13

Source: MFI 360 Explorer

Sector Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Auto	25,127	4.18	5.16	-1.84	10.04	27,696	19,317	25.82	28.33
Nifty Bank	55,735	0.71	-0.97	10.33	9.58	57,628	47,703	15.18	15.65
Nifty FMCG	55,304	1.19	-2.13	-11.11	-2.63	66,439	50,199	41.42	43.80
Nifty IT	34,635	-0.57	-6.75	-15.27	-20.08	46,089	30,919	25.01	28.54
Nifty Media	1,649	-0.22	-6.87	-19.92	-9.26	2,182	1,344	166.94	591.74
Nifty Metal	9,388	1.86	-0.75	4.37	8.53	10,322	7,690	18.04	21.49
Nifty Pharma	22,141	-0.05	-2.00	0.16	-5.43	23,908	19,121	31.92	33.89
Nifty Realty	898	2.17	-10.15	-14.32	-14.62	1,140	766	43.08	50.20
Nifty Energy	34,483	0.04	-4.83	-19.36	-2.00	44,721	29,313	15.13	13.79

Source: MFI 360 Explorer

Thematic Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Financial Services	26,609	1.05	0.20	15.81	13.17	27,370	22,358	17.42	17.66
Nifty India Consumption	12,090	2.11	3.34	2.31	6.40	13,058	10,091	41.29	43.08
Nifty Infrastructure	9,051	0.67	-1.80	-1.16	6.94	9,704	7,590	21.87	21.64
Nifty MNC	29,073	2.78	-0.22	-4.95	4.08	32,841	23,981	34.30	43.18
Nifty Public Sector Enterprise	9,547	-0.38	-4.17	-14.64	0.16	11,565	7,956	11.72	10.43

Source: MFI 360 Explorer

GLOBAL EQUITY MARKET

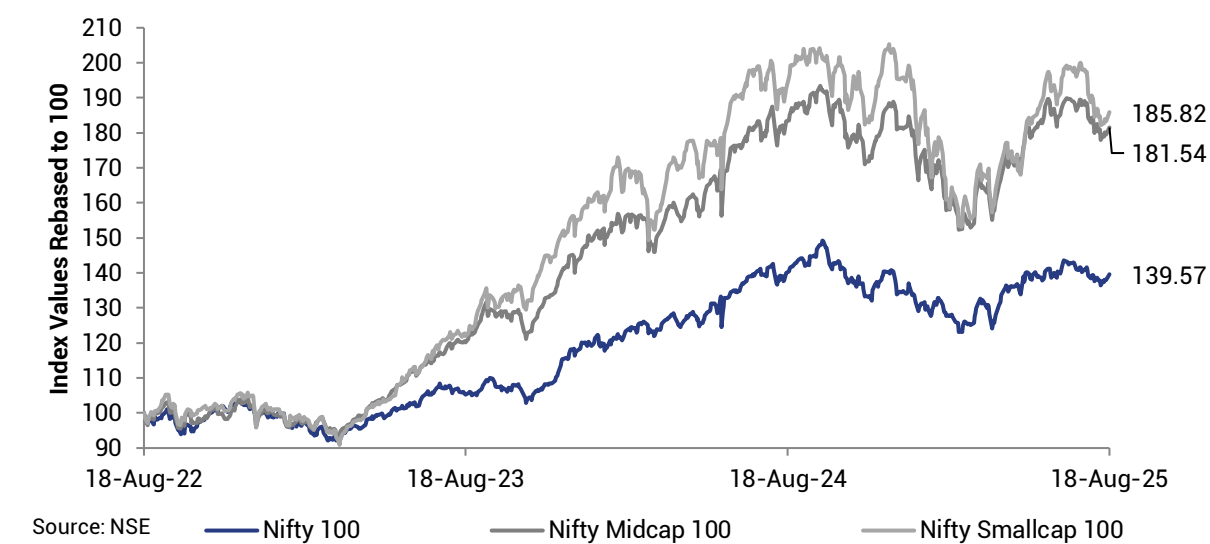
- The U.S. equity markets fluctuated before finishing broadly steady as investors tracked geopolitical developments and awaited insights from The U.S. Federal Reserve's policy symposium. Rate-cut expectations dominated sentiment, while upcoming earnings and softer housing confidence added to a cautious outlook across sectors.
- European equity markets were mixed as investors awaited Ukraine peace talks and the U.S. Federal Reserve's policy symposium for signals on economic and interest rate direction.
- Asian equities rose on U.S.-Russia talks and Powell's speech hopes. China gained on strong buying, driven by optimism that resolving the conflict may ease scrutiny of Russian oil purchases. Today (as of Aug 19), Asian equity fell as investors assessed U.S.-Ukraine-Europe White House talks outcome.

Global Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nasdaq 100	23,714	0.01	2.81	21.56	12.86	23,969	16,542	34.95	29.50
Nasdaq Composite	21,630	0.03	3.51	22.68	12.01	21,804	14,784	32.83	21.32
FTSE 100	9,158	0.21	1.84	10.18	12.05	9,222	7,545	17.93	12.21
CAC 40	7,884	-0.50	0.78	5.83	6.82	8,258	6,764	18.26	13.69
DAX	24,315	-0.18	0.10	32.71	22.13	24,639	18,209	19.21	23.75
Nikkei	43,714	0.77	9.78	14.85	9.57	43,835	30,793	20.08	18.34
Hang Seng	25,177	-0.37	1.41	44.44	25.51	25,767	16,964	11.68	10.01
SSE Composite Index	3,728	0.85	5.48	29.47	11.23	3,746	2,690	12.00	12.13

Source: MFI 360 Explorer; Returns are based in local currency

INDIAN DERIVATIVES MARKET

- Nifty Aug 2025 Futures stood at 24,966.80, a premium of 89.85 points above the spot closing of 24,876.95. The turnover on NSE's Futures and Options segment fell to Rs.7,763.75 crore on August 18, 2025, compared with Rs. 3,73,206.56 crore on August 14, 2025.
- The NSE Put-Call ratio stood at 0.85 compared with the previous session's close of 1.



F&O Trends	Px Last	Previous	Change %
Near Futures	24,966.80	24,684.70	1.14
Near Basis	89.85	53.40	68.26
Mid Futures	25,104.00	24,822.50	1.13
Mid Basis	227.05	191.20	18.75
Near Open Interest (Cr.)	1.64	1.67	-1.77
Mid Open Interest (Cr.)	0.14	0.12	15.38
Rollover (%)	9.53	8.16	16.80

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	14,464	15,672	-1,208	-22,183	-117,824
Mutual Funds**	10,874	5,509	5,366	41,326	319,412

*As on 18th August 2025;**As on 13th August 2025; Source: SEBI, NSDL

INDIAN ECONOMY

- The Centre's proposal for a two-tier GST structure, including a special 40% rate, anticipates the 18% slab remaining the primary revenue contributor. The restructuring involves eliminating the 12% and 28% slabs, with most items being shifted to either 5% or 18%, simplifying the tax framework and potentially reducing costs for consumers.
- Indian exporters frontloaded shipments to the U.S. to avoid potential higher duties, resulting in a 21% surge in exports between Apr and Jul 2025. While this growth provides a buffer for offering discounts, exporters fear that a 50% tariff could severely impact businesses operating on thin margins.
- The Finance Ministry is set to meet with public sector bank (PSB) heads to review their Q1 financial performance, in a meeting chaired by Financial Services Secretary. PSBs collectively posted a record profit of Rs. 44,218 crore, marking an 11% YoY increase, with SBI contributing significantly. While most banks reported profit growth, PNB saw a decline during the quarter.

INDIAN DEBT MARKET

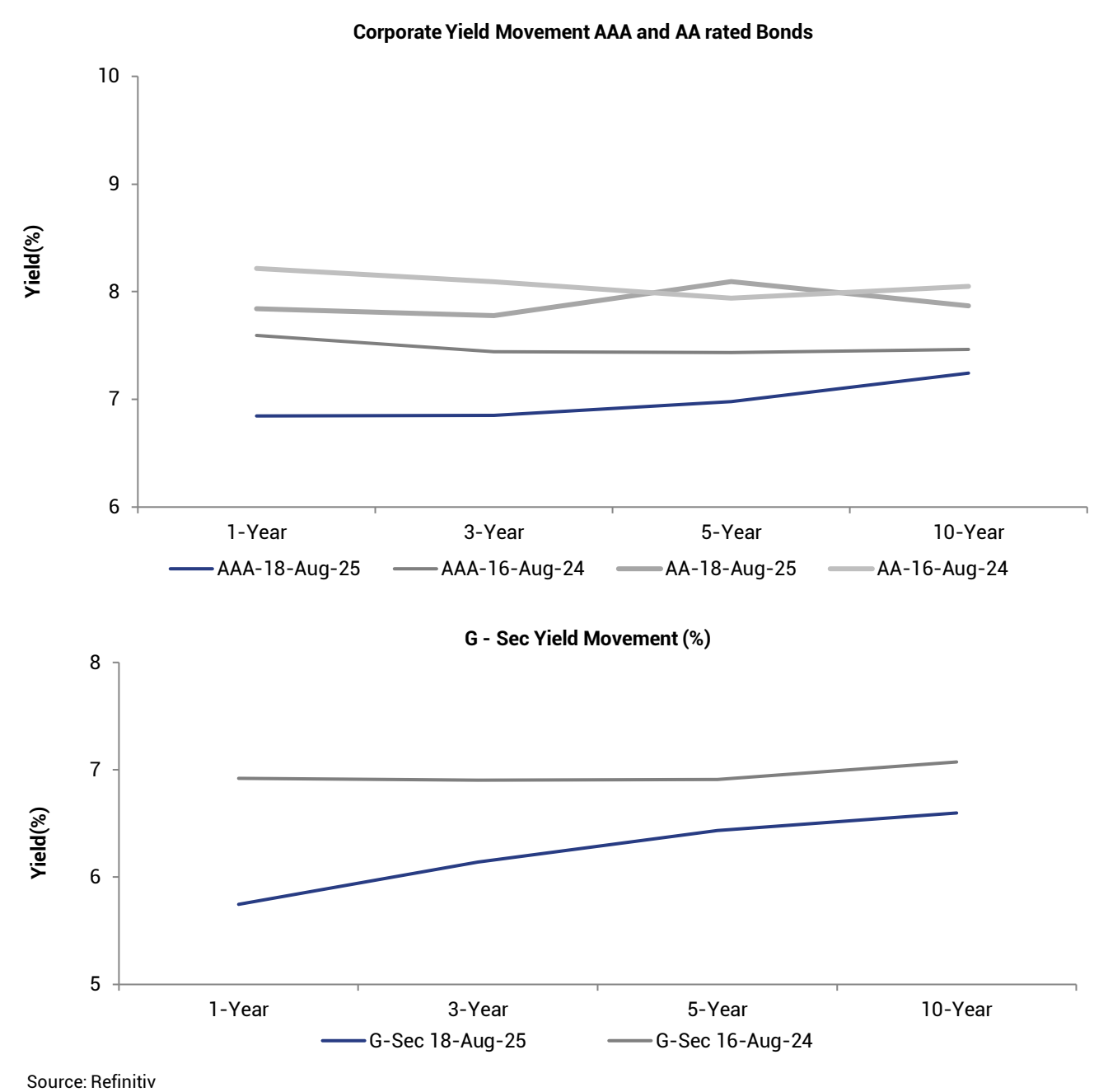
- Bond yields surged after the Indian Prime Minister announced sweeping changes to the Goods and Services Tax (GST) regime, reigniting fiscal concerns and stoking fears of increased debt supply.
- Yield on the 10-year benchmark paper (6.33% GS 2035) rose by 9 bps to close at 6.49% as compared to the previous close of 6.40%.
- Reserve Bank of India announced the sale (re-issue) of two dated securities namely 5.91% GS 2028 and 6.33% GS 2035 for a notified amount of Rs. 36,000 crore. The auction will be conducted on Aug 22, 2025.

MONEY MARKET

- According to media reports, Mindspace Business Parks REIT accepted bids for Rs. 550 crore for bonds maturing in eight years. The company will pay a coupon of 7.1470%.

SPREAD ANALYSIS

- Yields on gilt rose up to 10 bps across the maturities, barring 12 year paper that fell by 3 bps.
- Corporate bond yields increased between 2 to 11 bps across the curve, barring 1 year paper that fell by 2 bps.
- Difference in spread between AAA corporate bond and gilt contracted up to 12 bps across the segments, barring 6 & 10 year papers that expanded by 4 & 2 bps, respectively.



Key Indicators	Current	Previous
GDP (Q4 FY'25)	7.40%	6.40%
IIP (Jun'25)	1.50%	1.90%
Manufacturing PMI Jul'25	59.10	58.40
Credit Growth (Jul 25,2025)	10.00%	9.80%
Deposit Growth (Jul 25,2025)	10.20%	10.10%
WPI (Jul'25)	-0.58%	-0.13%
CPI (Jul'25)	1.55%	2.10%
Current Account Deficit (Q4 of FY25, in \$ Billion)	-13.50	11.30
Fiscal Deficit (Apr to Jun 2025, as a % of Budget Estimates)	16.66	0.78
Trade Deficit (In \$ billion-Jul25)	27.35	18.78

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

Source: Refinitiv

DEBT MARKET UPDATE

Policy Rates (%)	18-Aug-25	Week Ago	Month Ago	Year Ago
Reverse Repo	3.35	3.35	3.35	3.35
Repo	5.50	5.50	5.50	6.50
CRR	4.00	4.00	4.00	4.50
SLR	18.00	18.00	18.00	18.00

Source: RBI

Daily Rates (%)	18-Aug-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.45	5.41	5.39	6.55
CALL	5.40	5.37	5.35	6.52
T-Repo	5.32	5.35	5.31	6.37
OIS- 3 M	5.49	5.46	5.44	6.59
OIS- 6 M	5.50	5.47	5.47	6.57

Source: FBIL

Certificate of Deposit (%)	18-Aug-25	Week Ago	Month Ago	Year Ago
3-Month	5.82	5.82	5.78	7.29
6-Month	6.09	6.07	5.95	7.45
9-Month	6.29	6.27	6.23	7.59
12-Month	6.37	6.34	6.34	7.64

Source: Refinitiv

Commercial Paper (%)	18-Aug-25	Week Ago	Month Ago	Year Ago
3-Month	5.90	5.84	5.82	7.21
6-Month	6.09	6.09	6.02	7.53
12-Month	6.37	6.33	6.28	7.67

Source: Refinitiv

Maturity Buckets Yield	Yield (%)				Change in bps		
	Closing	Previous	1 Month	1 Year	1 Day	1 Month	1 Year
1 Yr GOI Bond	5.67	5.57	5.56	6.76	10	11	-110
3 Yr GOI Bond	6.05	5.96	5.78	6.74	9	26	-69
5 Yr GOI Bond	6.34	6.25	6.06	6.79	9	28	-45
10 Yr GOI Bond	6.49	6.40	6.30	6.87	9	19	-38
15 Yr GOI Bond	6.87	6.79	6.62	6.94	8	25	-7
US 10 Yr Treasury	4.34	4.33	4.43	3.89	1	-9	45

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	18-Aug-25	1 Month Avg.	1 Year Avg.	18-Aug-25	1 Month Avg.	1 Year Avg.
1 Yr	110	113	96	210	216	158
3 Yr	72	81	78	164	169	145
5 Yr	54	71	70	166	168	129
10 Yr	65	65	53	127	130	109

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	18-Aug-25	Week Ago	Month Ago	Year Ago
Govt Securities	42,821	49,155	69,702	49,838
Call Money	16,503	16,879	14,272	7,261
T-Repo	420,801	387,158	398,062	362,214
LAF	NA	NA	NA	NA
Treasury Bills	3,412	3,924	5,556	4,007
Interbank Liquidity	NA	NA	NA	NA

Source: Refinitiv

Transaction Trends (Debt)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	1,831	234	1,597	6,066	6,790
Mutual Funds**	17,770	16,731	1,039	-41,333	-382,265

*As on 18th August 2025;**As on 13th August 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: August 18-22,2025	36,000	0	N.A
Month: Aug 2025	121,000	53,000	43.80%
H1: Apr 25-Sep 25	800,000	606,000	75.75%

Source: RBI

GLOBAL ECONOMY

- Japan's seasonally adjusted tertiary activity index rose 0.5% MoM in Jun 2025, following a 0.3% increase in May, as reported by the Ministry of Economy, Trade and Industry.

INTERNATIONAL MARKET UPDATE

- Eurozone recorded a trade surplus of EUR 7.0 billion in Jun 2025, down from EUR 16.5 billion in May, according to data from Eurostat.

COMMODITY MARKET

- Gold prices slipped as geopolitical tension around peace talks and uncertainty over potential interest rate cuts kept investors cautious, weighing on safe-haven demand.
- Brent crude oil prices slightly changed as investors focused on high-level talks between U.S. and Ukrainian leaders, with geopolitical tensions over Russia-Ukraine conflict supporting supply risk concerns.

CURRENCY UPDATE

- The Indian rupee rose against the U.S. dollar, supported by a rally in the domestic equity market.
- The euro weakened against the U.S. dollar ahead of a meeting between the U.S. President and Ukrainian, European counterparts.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,330	-0.14	-0.57	32.82	26.92	3,432	2,483
Silver (\$/oz)	38	0.05	-0.42	31.04	31.64	39	28
NYMEX Crude(\$/bbl)	64	1.15	-5.87	-17.32	-10.96	81	58
Brent Crude(\$/bbl)	69	-0.01	-4.21	-16.80	-10.01	84	62
Baltic Dry Index	2,022	-1.08	-1.46	19.57	102.81	2,258	715
Core Commodity Index	366	0.20	-2.94	12.38	2.51	386	315
Industrial Metals Index	NA	NA	NA	NA	NA	NA	NA
Agriculture Index	NA	NA	NA	NA	NA	NA	NA
Energy Index	NA	NA	NA	NA	NA	NA	NA
Precious Metals Index	NA	NA	NA	NA	NA	NA	NA

Source: Refinitiv

Composite PMI Data	Latest Reported	1 Month Ago	3 Months Ago	6 Months Ago	1 Year Ago
U.S.	53.00	50.60	51.60	54.90	54.50
Euro Zone	50.90	50.60	50.40	50.20	50.20
Germany	50.60	50.40	50.10	50.50	49.10
France	48.60	49.20	47.80	47.60	49.10
U.K.	51.50	52.00	48.50	50.60	52.80
Japan	51.60	51.50	51.20	51.10	52.50
China	50.80	51.30	51.10	51.10	51.20

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	99,202	-0.46	1.43	41.18	30.68	100,672	67,984
Silver (1 kg)	113,995	-0.71	1.22	39.90	32.78	115,808	78,617
Crude Oil (1 bbl)	5,596	1.86	-3.57	-13.39	-7.76	7,249	1,277
Natural Gas (1 mmbtu)	249	0.20	-18.34	33.39	-26.13	392	138
Aluminium (1 kg)	254	-0.53	1.66	16.28	4.58	267	209
Copper (1 kg)	885	-1.14	-0.61	11.64	10.85	934	772
Nickel (1 kg)	1,333	-0.66	1.08	-2.48	-0.42	1,783	1,276
Lead (1 kg)	185	-0.24	0.74	-4.72	-1.60	201	179
Zinc (1 kg)	269	-1.37	0.75	1.66	-5.31	301	241
Mentha Oil (1 kg)	1,019	-1.93	9.62	2.08	2.50	1,046	916
Cotton (1 bales)	NA	NA	NA	NA	NA	NA	NA

Source: MCX-SX

CURRENCY MARKET UPDATE

Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
USD/INR	87.35	-0.23	1.40	4.06	2.03	87.95	83.44
EUR/INR	101.77	-0.57	1.63	10.02	14.90	102.68	87.29
GBP/INR	117.87	-0.60	2.08	8.56	10.12	119.00	104.67
YEN(100)/INR	59.02	-0.71	1.99	3.88	8.46	60.83	53.87
SGD/INR	67.95	-0.32	1.43	6.60	8.48	68.48	62.21

Source: Refinitiv

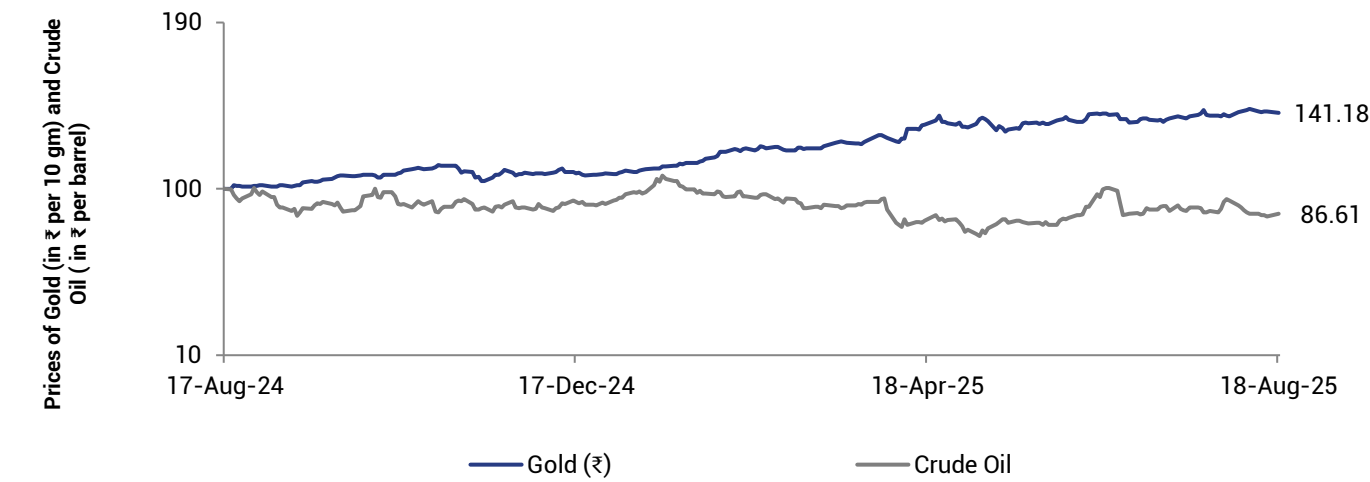
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.17	-0.32	0.30	5.73	12.62	1.18	1.01
GBP/USD	1.35	-0.36	0.73	4.31	7.92	1.38	1.21
USD/JPY	147.86	0.46	-0.64	0.19	-5.93	158.87	139.56
SGD/USD	0.78	-0.12	0.05	2.41	6.30	0.78	0.73
Dollar Index	98.17	0.32	-0.32	-4.19	-9.51	110.18	96.38

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	87.41	-0.24	1.78	1.43	2.09
Future 3 Month	87.76	-0.28	2.06	1.42	2.01
Future 6 Month	88.36	-0.30	2.50	1.28	2.13
NDF 1 Month	87.44	-0.23	1.83	1.37	2.02
NDF 3 Month	87.73	-0.23	1.61	1.40	1.98
NDF 6 Month	88.19	-0.23	1.53	1.45	1.98

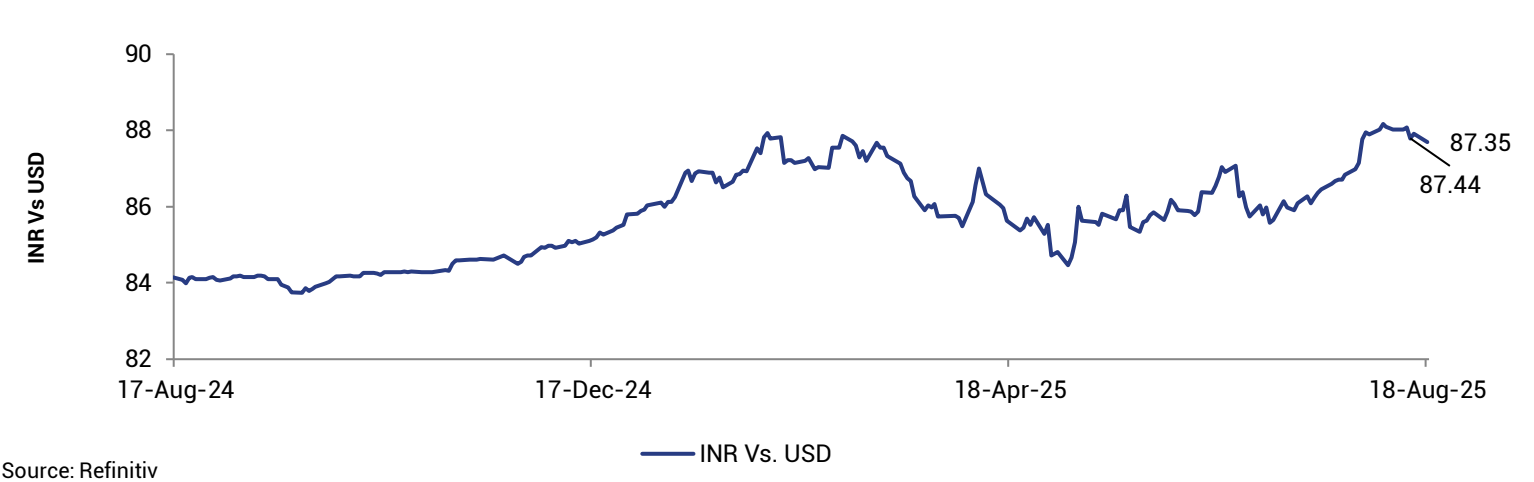
Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹)



Source: MCX-SX

RUPEE VS. U.S. DOLLAR

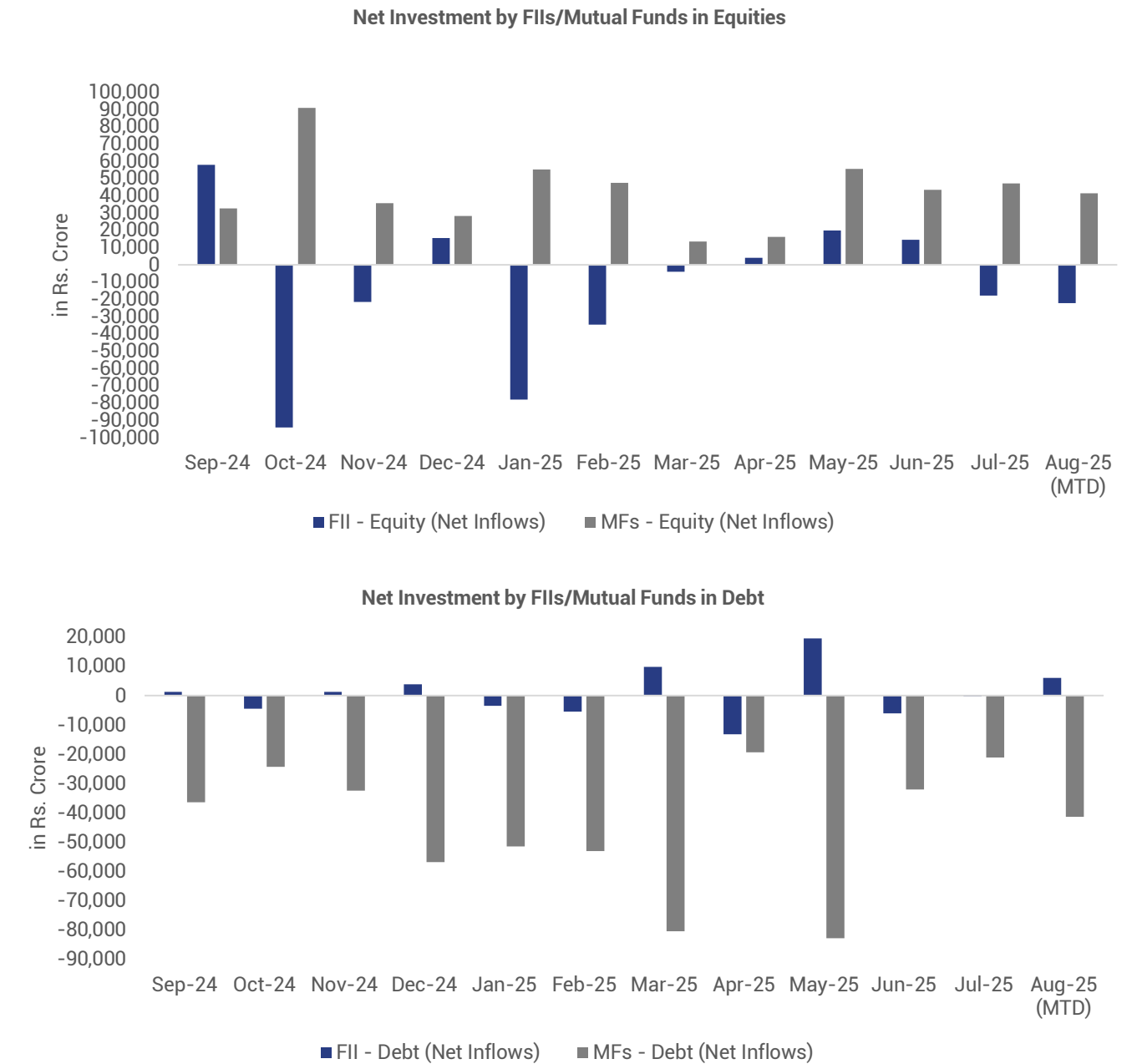


Source: Refinitiv

MUTUAL FUND AND INSURANCE UPDATE

- According to AMFI, the monthly SIP contribution reached a new high in Jul 2025, standing at Rs. 28,464 crore. SIP AUM decreased to Rs. 15.19 lakh crore in Jul 2025, compared to Rs. 15.31 lakh crore in Jun 2025, with 944.97 lakh outstanding SIP accounts.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Reserve Money	20-Aug-25
Money Supply	20-Aug-25
Currency in Circulation	20-Aug-25
Forex Reserves	22-Aug-25
Credit Growth	22-Aug-25
Deposit Growth	22-Aug-25

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MF SCHEMES CATEGORY WISE PERFORMANCE

Category-Equity	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Large Cap Fund	1.37	-0.37	10.02	0.76	13.80	18.05
Mid Cap Fund	1.64	-1.45	16.28	0.85	20.53	25.89
Large & Mid Cap Fund	1.45	-1.21	13.25	0.82	17.53	22.31
Small Cap Fund	1.52	-3.78	17.01	-1.47	20.58	29.20
Multi Cap Fund	1.55	-1.67	13.84	0.76	18.78	23.80
Focused Fund	1.32	-0.94	11.18	0.56	15.15	19.22
Value Fund	1.13	-2.27	10.09	-2.18	18.81	23.19
Contra Fund	1.02	-1.53	10.81	-0.43	19.94	24.90
ELSS	1.43	-1.46	12.46	0.27	16.45	22.00
Sectoral	1.53	-1.22	13.63	3.20	19.08	22.73
Thematic	1.63	-0.80	11.85	-1.08	17.66	21.58
Dividend Yield Fund	1.12	-1.81	9.01	-3.87	18.32	22.67

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Category-Debt	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Overnight Fund	5.24	5.26	5.66	6.14	6.35	5.14
Liquid Fund	5.76	5.41	6.57	6.90	6.90	5.51
Ultra Short Duration Fund	4.88	5.02	7.31	7.15	6.77	5.52
Low Duration Fund	3.61	4.59	8.27	7.76	7.09	5.79
Money Market Fund	4.81	5.06	8.07	7.69	7.17	5.78
Short Duration Fund	-2.74	1.02	8.88	8.23	7.26	6.00
Medium Duration Fund	-3.08	-1.43	8.90	8.54	7.36	6.80
Medium to Long Duration Fund	-13.38	-10.42	6.30	6.44	6.79	5.30
Long Duration Fund	-25.32	-26.01	2.91	4.53	7.82	5.12
Corporate Bond Fund	-4.35	-0.10	9.17	8.43	7.36	5.98
Gilt Fund	-19.80	-22.24	3.95	5.14	6.69	5.15
Gilt Fund with 10 year constant duratio	-10.73	-11.93	7.77	7.95	7.84	5.47
Dynamic Bond	-12.95	-11.58	6.31	6.47	6.95	5.64
Banking and PSU Fund	-3.46	0.12	8.77	8.12	7.18	5.86
Floater Fund	-0.35	1.82	8.85	8.25	7.67	6.27
Credit Risk Fund	2.32	2.21	12.96	10.59	8.43	9.25

Less than 1 yr return are simple annualised and greater than 1 yr returns are CAGR

Category-Hybrid	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Arbitrage Fund	0.03	0.40	2.99	6.45	6.76	5.43
Balanced Advantage	0.77	-0.63	7.46	2.30	11.25	12.20
Aggressive Hybrid Fund	1.02	-0.72	10.02	2.35	13.93	17.35
Equity Savings	0.36	0.07	5.80	5.17	9.55	10.45
Conservative Hybrid Fund	0.16	-0.51	5.03	5.49	8.74	9.23
Multi Asset Allocation	0.61	-0.47	9.26	6.67	15.77	17.32

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Source: MFI 360 Explorer

Event	Date
Loans and Advances to Central Government	22-Aug-25
Loans and Advances to State Government	22-Aug-25
Index of Industrial Production (Jul 2025)	28-Aug-25
GDP (Q1FY26)	29-Aug-25
Infrastructure Output	29-Aug-25
Fiscal deficit (as a % of budget estimates)	29-Aug-25