CareEdge RATINGS

Morning Brief – August 11, 2026

Global

- UK retail sales rose by 1% y-o-y on a like-for-like basis in July slowing from a 1.7% increase in June and marking as the softest growth since February.
- China's central bank pledged in its five-year plan to keep the yuan exchange rate stable and expand the use of the Chinese currency in international trade and investment.
- Euro Zone's Sentix investor confidence index rose to 0.9 points in August from -3.1 in July, helped by a sharp improvement in current economic conditions and continued confidence in the recovery.

Domestic

- E-way bill generation rose 6% y-o-y to 139.8 million in July, indicating sustained movement of goods in the economy, according to GSTN data.
- Government e-Marketplace (GeM) has recorded a sharp increase in its GMV to over Rs 1.55 trillion from Rs 422 crore a decade ago, said Piyush Goyal, Commerce and Industry Minister.
- India's unemployment rate rose to 5.4% in Q1 FY27 from 5% in Q4 FY26, driven primarily by an increase in the rural jobless rate, according to PLFS data.

Global Indicators

	07-08-2026	10-08-2026	%/bps change
Dow Jones	54,037	53,976	(0.11)
NASDAQ	26,691	26,605	(0.32)
S & P 500	7,758	7,753	(0.06)
Nikkei 225	65,607	66,970	2.08
FTSE 100	10,901	10,863	(0.35)
US 10-yr (%)	4.66	4.70	4 bps
US 2-yr (%)	4.20	4.24	4 bps
UK 10-yr (%)	4.92	4.99	6 bps
Germany 10-yr (%)	3.13	3.18	5 bps
Gold ($/oz)	4342	4389	1.08
Crude Oil-WTI ($/bbl)	78.18	82.13	5.05
Crude Oil-Brent ($/bbl)	83.55	87.72	4.99
€/$	1.16	1.15	(0.14)
$/¥*	157.78	159.30	0.96
£/$	1.35	1.35	0.11

Figures in brackets denote negative numbers; *Negative values denote appreciation while positive values denote depreciation; Source: Refinitiv.

Equity and Currency Markets – Domestic

	07-08-2026	10-08-2026	% change
Sensex	78,499	78,542	0.06
NIFTY	24,571	24,584	0.05
$/Rs*	95.21	95.31	0.10
€/Rs*	110.04	110.04	0.01

Figures in brackets denote negative numbers; *Negative values denote appreciation while positive values denote depreciation; Source: Refinitiv.

Money Market – Domestic

	06-08-2026	07-08-2026
Avg. Call Rate (%)	5.18	5.09
Vol. Traded (Rs million)	1,36,064	1,56,771
Net banking system liquidity outstanding (Rs million)*	(36,14,143)	(34,96,603)
	07-08-2026	**10-08-2026**
T-Bills 91 days (%)	5.25	5.27
182 days (%)	5.52	5.52
364 days (%)	5.68	5.66
G-sec 3 years (%)	6.19	6.19
5 years (%)	6.35	6.36
10 years (%)	6.77	6.77

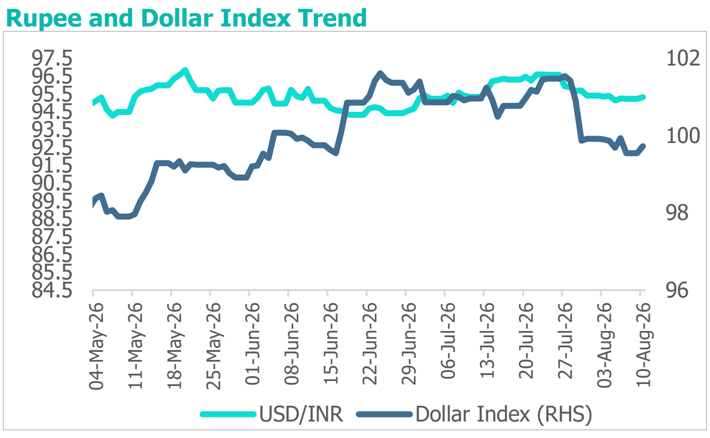
*Net banking system liquidity outstanding = Repo + MSF + SLF - reverse repo - SDF. Negative values denote liquidity is in surplus while positive values denote liquidity is in deficit. Figures in brackets denote negative numbers; Source: RBI, Refinitiv.

FPI and MFs Investment Flows - Domestic

	Equity	Debt	Total (Net)^
	Net	Net	
Net FPI Flows (USD million)			
Jul-26	2,123	1,948	4,194
Aug-26	1,463	169	1,575
07-08-2026	49	(79)	(29)
10-08-2026	107	181	286
MF Investments (Rs million)			
August-26#	2,16,953	(2,38,513)	(21,560)

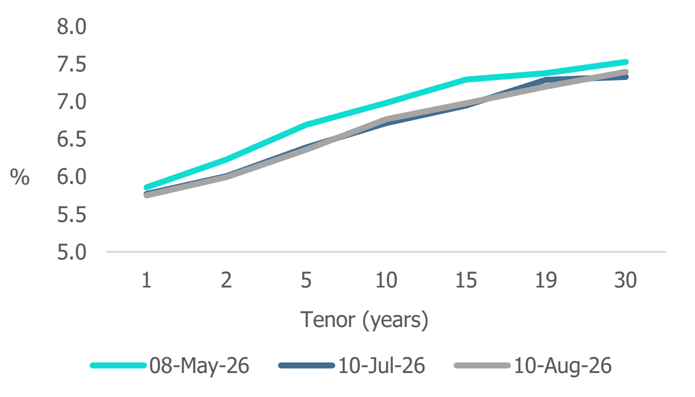
*Latest data as of previous trading day; #Data till 07 August 2026; ^FPI Total (Net) of equity, debt, hybrid, mutual funds & AIFs; Figures in brackets denote negative numbers; Source: NSDL, SEBI.

Rupee and Dollar Index Trend



Source: Refinitiv

G-Sec Yield Curve – Domestic



Source: Refinitiv

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