CareEdge RATINGS

# Morning Brief – August 27, 2026

| Global | Domestic |
|---|---|
| • US crude inventories rose by 0.1 million barrels to 428.9 million barrels in the week ended August 21, compared with expectations for a 0.6 million-barrel rise.<br>• The US economy expanded at an annualized rate of 1.5% in Q1 FY27, slowing from 2.1% in the previous quarter, but consumer spending stayed strong.<br>• The US PCE price index rose 0.2% m-o-m in July, following a 0.1% decline in June. Services inflation accelerated to 0.3%, while goods prices fell 0.1%. | • Government realised nearly ₹3,000 crore from share sale of Hindustan Copper with the closure of the Offer for Sale (OFS), taking total disinvestment collections to Rs 55,700 crore in FY27 so far.<br>• FM Nirmala Sitharaman urged Canadian investors to tap India's fast-growing economy, highlighting its scale, young population, expanding consumption, digital infrastructure and deepening capital markets.<br>• India is open to expanding the scope, scale and extent of its Comprehensive Economic Partnership Agreement (CEPA) with Japan, said commerce and industry minister Piyush Goyal. |

## Global Indicators

| | 25-08-2026 | 26-08-2026 | %/bps change |
|---|---|---|---|
| Dow Jones | 53,577 | 53,464 | (0.21) |
| NASDAQ | 26,151 | 26,130 | (0.08) |
| S & P 500 | 7,677 | 7,676 | (0.02) |
| Nikkei 225 | 65,856 | 66,262 | 0.62 |
| FTSE 100 | 10,886 | 10,878 | (0.07) |
| US 10-yr (%) | 4.64 | 4.66 | 2 bps |
| US 2-yr (%) | 4.20 | 4.22 | 3 bps |
| UK 10-yr (%) | 4.99 | 5.04 | 4 bps |
| Germany 10-yr (%) | 3.20 | 3.23 | 2 bps |
| Gold ($/oz) | 4657 | 4592 | (1.39) |
| Crude Oil-WTI ($/bbl) | 82.36 | 82.23 | (0.16) |
| Crude Oil-Brent ($/bbl) | 88.58 | 87.84 | (0.84) |
| €/$ | 1.17 | 1.16 | (0.21) |
| $/¥* | 159.16 | 159.29 | 0.08 |
| £/$ | 1.36 | 1.36 | (0.41) |

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

## Equity and Currency Markets – Domestic

| | 25-08-2026 | 26-08-2026 | % change |
|---|---|---|---|
| Sensex | 77,656 | 77,473 | (0.24) |
| NIFTY | 24,335 | 24,208 | (0.52) |
| $/Rs* | 95.42 | #N/A | #N/A |
| €/Rs* | 111.39 | #N/A | #N/A |

Figures in brackets denote negative numbers; *Negative values denote appreciation while positive values denote depreciation; Source: Refinitiv; Data not available for August 26 due to a holiday.

## Money Market – Domestic

| | 21-08-2026 | 24-08-2026 |
|---|---|---|
| Avg. Call Rate (%) | 5.19 | 5.19 |
| Vol. Traded (Rs million) | 1,32,844 | 1,71,458 |
| Net banking system liquidity outstanding (Rs million)* | (34,00,419) | (36,41,659) |
| | 24-08-2026 | 25-08-2026 |
| T-Bills 91 days (%) | 5.27 | 5.26 |
| 182 days (%) | 5.56 | 5.54 |
| 364 days (%) | 5.74 | 5.74 |
| G-sec 3 years (%) | 6.25 | 6.24 |
| 5 years (%) | 6.50 | 6.46 |
| 10 years (%) | 6.87 | 6.85 |

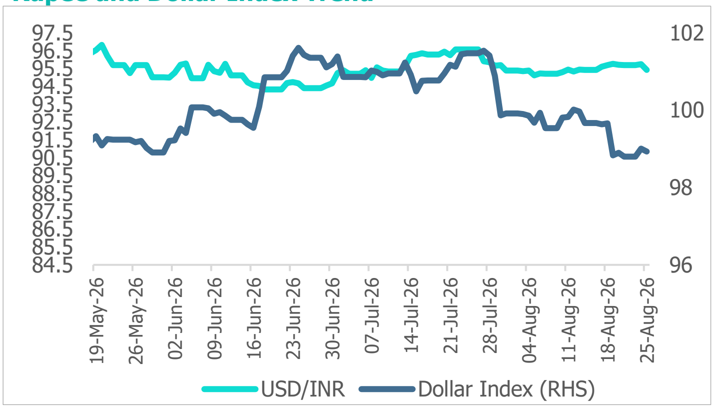
*Net banking system liquidity outstanding = Repo + MSF + SLF - reverse repo - SDF. Negative values denote liquidity is in surplus while positive values denote liquidity is in deficit. Figures in brackets denote negative numbers; Source: RBI, Refinitiv; Data not available for August 26 due to a holiday.

## 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 | 2,849 | (90) | 2,485 |
| 24-08-2026 | 206 | (41) | 158 |
| 25-08-2026 | 174 | (25) | 146 |
| MF Investments (Rs million) | | | |
| August-26# | 2,78,867 | (3,14,422) | (35,555) |

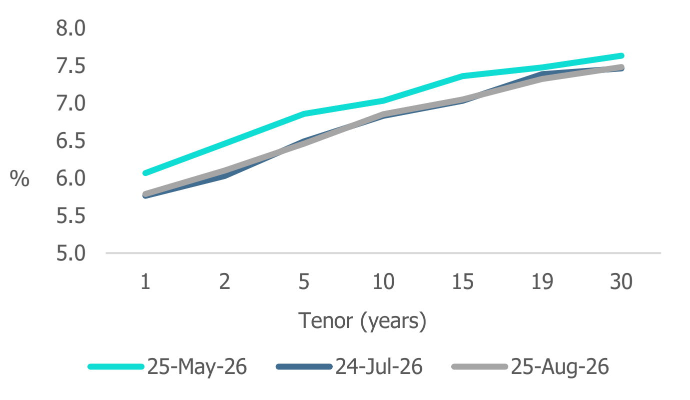
*Latest data as of previous trading day; #Data till 13 August 2026; ^FPI Total (Net) of equity, debt, hybrid, mutual funds & AIFs; Figures in brackets denote negative numbers; Source: NSDL, SEBI; FPI data not available for August 26 due to a holiday.

## Rupee and Dollar Index Trend




Source: Refinitiv; Data not available for August 26 due to a holiday.

## G-Sec Yield Curve – Domestic




Source: Refinitiv; Data not available for August 26 due to a holiday.

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