

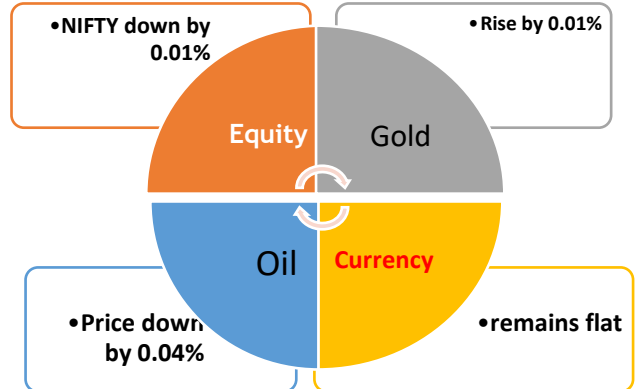
Wrapping Up the Week..... (04.08.2025 -08.08.2025)

Market Movers

Highs & Lows of Key Market Indicators

Indicators	High	Low	Average
USD/INR	87.80	87.66	87.71
10 Yr G-Sec	6.42	6.32	6.37
US 10Yr T Bill	4.26	4.19	4.22
Crude Brent) \$/BL	68.58	66.30	67.26
Canara Bank	108.80	107.46	108.13

Movement Over Previous Week



News that Made News

Global

- OPEC+ plans to boost oil output by 5,47,000 barrels per day by Sep'25.
- US trade deficit narrowed to \$60.2 bn in Jun'25 lowest since Sep'23.
- China's Jul'25 trade surplus hit \$98.24 bn below expectation of \$105 bn.

Domestic

- GST collection of Rs 1.96 tn in Jul'25, 7.5% increase from Jul'24.
- Trump raised US tariffs on Indian Imports to 50% for russian oil purchases.
- India 's service sector surged to 11 month high in Jul'25.HSBC Index at 60.5.

Banking

- MPC Aug'25 -No change in rate, Repo,MSF & SDF at 5.5%,5.75% & 5.25% resp.
- Banks sanctioned Rs 4930 cr to 34697 accounts under Mudra -Tarun Plus in Q1.
- RBI eased norms for opening Special Rupee Vostro Accounts (SRVAs).

Scenario Analysis

SBI Q1 Results: Net profit rises 12% YoY to ₹19,160 crore; NII, NIM declines.NIM at 2.90%.

BOB introduced bob FXOne, digital foreign exchange platform for corporate & MSME Clients.

LIC net profit rises 5% to 10,987 cr in June quarter. Total income increased to ₹2,22,864 cr.

Peer's Signals Sensed

Policy Moves

RBI

RBI has formed a 30 member Regulatory review cell to streamline 8,000 rules ,to reduce compliance costs, boost transparency and update regulatory framework.

Govt.

Govt directed PSB to launch a Unified digital portal by Oct'25 to simplify startup loan applications, sanctions and information sharing with a single application form.

Event /News of the Week:

US tariff hike on INDIA

Trump's imposition of doubled trade tariffs on India to 50%:

- ✓ Indian exports to the US stood at \$86.5 billion and Imports stood at \$45.7 billion in FY25, Key sectors effected are Textiles & Apparel, Gems & Jewellery, Seafood & Marine Products.
- ✓ Crucial export sectors from India shielded from the tariff hikes, pending Section 232 investigation by US are Pharmaceuticals, Smartphones & Electronics, Energy & Petroleum Products.
- ✓ GDP growth in FY26 is likely to be impacted to the extent of 60-70 bps.