

Broad Indices	Oct 01	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	84266	-0.04	6.03	28.01	24.74
Nifty 50	25797	-0.05	6.86	31.36	24.25
BSE Mid cap	49484	0.27	6.03	53.01	43.34
Nifty Midcap 100	60358	0.34	7.22	48.90	45.11

Sectoral Indices	Oct 01	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	61235	0.30	6.45	67.18
BSE Bankex	60100	0.10	0.41	19.78
BSE CD	67941	0.41	14.48	49.78
BSE CG	73078	-0.04	0.48	53.11
BSE FMCG	23747	-0.17	14.55	27.13
BSE Healthcare	44251	0.04	18.79	55.28
BSE IT	42813	1.05	13.77	33.52
BSE Metal	34631	0.07	4.02	49.23
BSE Oil & Gas	31611	-0.71	6.99	66.15
BSE Power	8637	-0.17	8.92	85.36
BSE Realty	8572	-0.24	-0.33	86.12

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Tech Mahindra	3.06	IndusInd Bank	-2.62
M&M	2.28	ONGC	-1.90
Britannia	1.70	Asian Paints	-1.55
Adani Enterpris	1.60	Bajaj Auto	-1.53
Infosys	1.53	Titan Company	-1.26

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Sep 30	MF Inv Sep 27	DII Inv Oct 01
Buy	20376	45852	14435
Sell	26803	38066	9826
Net	-6427	7786	4610
Net (YTD)	92087	265702	346672

Policy rates	Oct 01	1W Ago
Repo (%)	6.50	6.50
Reverse repo (%)	3.35	3.35
CRR (%)	4.50	4.50
Overnight rates	Oct 01	1W Ago
Call (%)	5.75	5.75
10 Yr Gilt(%)^	6.73	6.76
TREP (%)	6.25	6.20
Short-term debt	Oct 01	1W Ago
3-month CPs (%)	7.49	7.54
6-month CPs (%)	7.80	7.85
3-month CDs (%)	7.11	7.22
6-month CDs (%)	7.47	7.47
182-day T-bill (%)^	6.50	6.58
364-day T-bill (%)^	6.54	6.59
Long-term debt	Oct 01	1W Ago
3-Y G-sec (%)	6.66	6.69
5-Y G-sec (%)	6.66	6.68
10-Y G-sec (%)	6.73	6.76

^Weighted average yield

Indian Equity

- Indian equities ended flat on Tuesday, with earlier gains tracking positive global cues, including hawkish comments from Federal Reserve Chairman Jerome Powell, cut short due to uncertain domestic economic indicators
- The top gainers were Tech Mahindra, Mahindra & Mahindra, Britannia, Adani Enterprises and Infosys, up 1.53-3.06%.
- The top losers were IndusInd Bank, ONGC, Asian Paints, Bajaj Auto and Titan Company, down 1.26-2.62%.

Indian Debt

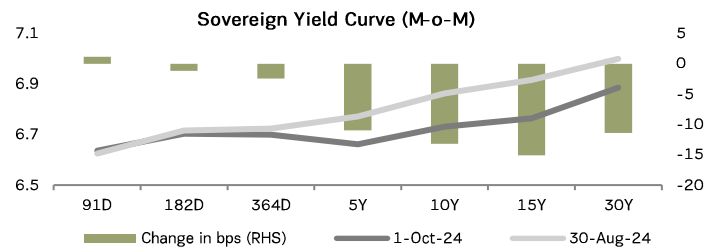
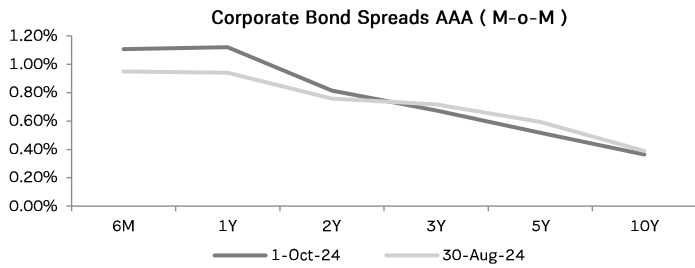
- The interbank call money rate ended lower at 5.75% on Tuesday compared to 6.24% on Monday.
- Government bond prices ended higher on Tuesday due to fall in the US treasury yields.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended lower at 6.73% on Tuesday compared to 6.75% on Monday.

Economy and Government

- India HSBC Manufacturing PMI fell to 56.5 in September compared to 57.5 August.
- India Retail inflation for industrial workers inched up marginally to 2.44% in August against 2.15% in July this year.
- India's Gross GST collection in September grew 6.5% to about Rs 1.73 lakh crore.
- India launched the Cruise Bharat Mission to expand cruise tourism over five years, planning 10 sea cruise terminals, 100 river cruise terminals, and five marinas.
- Prime Minister Narendra Modi unveiled development projects worth over Rs 83,700 crore from Jharkhand.
- Prime Minister Narendra Modi announced the next step of the Swachh Bharat Abhiyan-- Mission Amrit.
- The government notified April 1, 2025, as the sunset date for the anti-profiteering clause in the GST law.
- The government plans to amend the Geographical Indications (GI) of goods' law and seeks comments from public and concerned stakeholders for the same.
- The Union government approved Rs 11,000 crore to enhance road connectivity in Chhattisgarh.
- Union Finance Minister Nirmala Sitharaman advised the Arunachal Pradesh government to adopt the cluster development approach as a key strategy for enhancing productivity and competitiveness as well as capacity building of micro and small enterprises (MSEs) in the state.
- Power Minister Arup Biswas said the West Bengal Cabinet gave its nod to set up a 660-megawatt supercritical electricity plant at Sagardighi.
- The Delhi government plans to provide a 10-20 per cent tax rebate to buyers of new vehicles who opt to scrap their old ones.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.65	7.62	8.36	8.41	9.70
3-Yr	6.66	7.44	8.18	8.23	9.52
5-Yr	6.66	7.29	8.14	8.19	9.48
10-Yr	6.73	7.21	8.06	8.11	9.40

* Weighted average yields



Global Indices	Oct 02	1D % Chg	3M % Chg	1Y % Chg
DJIA	42197	0.09	7.28	26.21
Nasdaq	17925	0.08	-0.57	34.70
FTSE 100	8291	0.17	2.09	10.39
DAX	19165	-0.25	5.51	25.69
Nikkei 225	37809	-2.18	-5.65	19.05
Hang Seng	22444	6.20	26.31	26.02
KOSPI	2562	-1.22	-7.88	3.92

Global 10 yr Sov. Yields (%)	Oct 02	1D Ago	3M Ago	1Y Ago
US	3.79	3.74	4.43	4.68
UK	4.029	4.05	4.25	4.60
German	2.102	2.09	2.61	2.91
Japan	0.831	0.84	1.10	0.76

Commodity Prices	Oct 01	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)*	73.9	73.56	86.24	90.71
NYMEX Crude Oil (\$/bbl)*	70.1	69.83	82.81	88.82
Gold (Rs / 10 gm)#	75515	75197	71874	57719

ibjrarates spot prices *data as of Oct 02

Currencies Vs INR	Oct 01	1D Ago
USD	83.82	83.80
GBP	111.69	112.24
Euro	93.03	93.77
100 Yen	58.32	58.78
Forex Reserve (\$ bn)*	692.30	689.46

* Data pertains to Sep 20 and to Sep 13 respectively

Source: CRISIL

Key Macro Indicators	
CPI	3.65% (Aug -2024)
WPI	1.31% (Aug -2024)
IIP	4.8% (Jul -2024)
GDP Growth Rate	6.7% (April-June FY25)

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Capital Market

- Mankind Pharma received CCI's approval for its Rs 13,630 crore acquisition of Bharat Serums and Vaccines.
- Godrej Properties' board plans to raise up to Rs 6,000 crore through the issuance of various securities.
- IIFL Home Finance plans to raise up to Rs 3000 cr through a public issue of bonds
- Reliance Infrastructure's board approved a proposal to raise Rs 2,930 crore by issuing unsecured foreign currency convertible bonds (FCCBs) to VFSI Holdings Pte Limited.
- Varindera Constructions filed draft papers with SEBI to mobilise Rs 1,200 crore through an initial share sale.
- Solarworld Energy Solutions filed preliminary papers with SEBI to garner Rs 600cr through an IPO.
- Rahee Infratech Ltd filed preliminary papers with SEBI for raising funds through an IPO worth Rs 420cr through fresh issuance of shares.

Global Equity

- Wall Street ended slightly higher on Wednesday led by gains in technology stocks while investors remained cautious ahead of the release of the labor data.
- 10-year US bond yield ended higher at 3.79% following upbeat ADP employment data.
- FTSE index closed higher on Wednesday buoyed by gains in energy stocks following rally in the global oil prices.
- Asian markets were trading mixed at 8.30 AM.

International

- US S&P Global Manufacturing PMI revised higher to 47.3 in September from a 47.9 in previous month.
- US added 143K workers to their payrolls in September 2024, the most in three months, following an upwardly revised 103K in August.
- Eurozone HCOB Eurozone Manufacturing PMI edged down to 45 in September compared to 45.8 in the previous two months.
- Eurozone annual flash inflation rate eased to 1.8% in September compared to 2.2% in August, while the core flash inflation to 2.7% from 2.8%.
- UK S&P Global Manufacturing PMI fell to 51.5 in September compared to 52.5 in August.

Upcoming market indicators

- US ADP Employment Change, September (October 02)
- US ISM Services PMI, September (October 03)
- US Initial Jobless Claims, September 28 (October 03)
- Eurozone HCOB Composite/Services PMI, September (October 03)
- UK S&P Global Composite/Services PMI, September (October 03)
- Japan Jibun Bank Services/Composite PMI, September (October 03)
- US Non-Farm Payrolls, September (October 4)
- US Unemployment Rate, September (October 4)
- UK S&P Global Construction PMI September (October 4)
- India HSBC Composite/Services PMI, September (October 4)