

Broad Indices	Oct 07	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81050	-0.78	1.32	22.81	23.79
Nifty 50	24796	-0.87	1.94	26.16	23.31
BSE Mid cap	47019	-1.85	-0.88	46.58	41.18
Nifty Midcap 100	57300	-2.01	0.37	42.24	42.82

Sectoral Indices	Oct 07	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	58318	-0.38	0.85	60.95
BSE Bankex	57168	-2.10	-5.24	14.68
BSE CD	64612	-1.89	10.07	38.86
BSE CG	68792	-2.15	-8.44	42.71
BSE FMCG	22845	-0.73	9.17	22.32
BSE Healthcare	43124	-1.01	12.75	53.65
BSE IT	42495	0.32	10.42	30.18
BSE Metal	33511	-2.24	-0.68	47.92
BSE Oil & Gas	29783	-2.38	-1.23	59.23
BSE Power	8093	-3.14	-0.03	78.21
BSE Realty	7964	-1.15	-8.88	69.62

Nifty			
Top Out performers	% Change	Top Under performers	% Change
M&M	1.42	Adani Ports	-4.14
ITC	1.32	Bharat Elec	-3.55
Trent	1.31	NTPC	-3.48
Bharti Airtel	1.29	Coal India	-3.37
Infosys	0.84	SBI	-3.26

Foreign & Domestic flows	FII Inv	MF Inv	DII Inv
Rs. Cr (Equity)	Oct 04	Oct 03	Oct 07
Buy	14962	20818	23924
Sell	24607	9765	10679
Net	-9645	11053	13245
Net (YTD)	61727	287496	381736

Policy rates	Oct 07	1W Ago
Repo (%)	6.50	6.50
Reverse repo (%)	3.35	3.35
CRR (%)	4.50	4.50
Overnight rates	Oct 07	1W Ago
Call (%)	5.75	6.24
10 Yr Gilt(%)^	6.85	6.75
TREP (%)	6.30	6.67
Short-term debt	Oct 07	1W Ago
3-month CPs (%)	7.52	7.45
6-month CPs (%)	7.75	7.70
3-month CDs (%)	7.24	7.18
6-month CDs (%)	7.43	7.32
182-day T-bill (%)^	6.52	6.54
364-day T-bill (%)^	6.55	6.55
Long-term debt	Oct 07	1W Ago
3-Y G-sec (%)	6.71	6.66
5-Y G-sec (%)	6.76	6.67
10-Y G-sec (%)	6.85	6.75

^Weighted average yield

Indian Equity

- Indian equities ended lower on Monday as China's aggressive fiscal measures raised concerns over foreign portfolio investments.
- The top losers were Adani Ports, Bharat Electronics Ltd, NTPC, Coal India and SBI, which were down 3.26-4.14%.
- The top gainers were Mahindra & Mahindra, ITC, Trent, Bharti Airtel and Infosys, which were up 0.84-1.42%.

Indian Debt

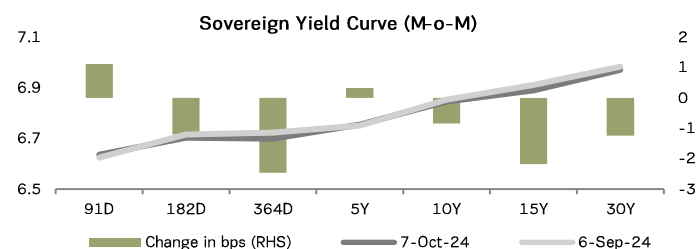
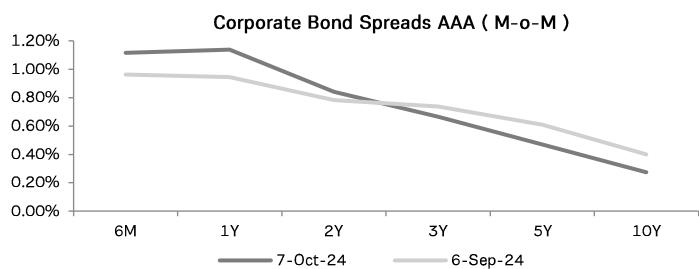
- The interbank call money rate ended lower at 5.75% on Monday compared to 6.25% on Friday.
- Government bond prices ended flat on Monday as investors remained on the sidelines ahead of RBI's interest rate decision due this week.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended flat at 6.83% on Monday.

Economy and Government

- According to S&P Global Commodity Insights, India's clean energy capacity is expected to surge by 2030, driven by strategic government initiatives like the Production-Linked Incentive (PLI) scheme.
- India reduced the local remedies period for UAE investors from five years to three years under the new BIT.
- India and France signed MoU for bilateral coop to strengthen aerospace ties.
- The Gujarat government began 'Vikas Saptah' to mark the state's development under the chief ministership of Narendra Modi.
- Commerce and Industry Minister Piyush Goyal said India is poised to attract \$100 bn in investments from the United Arab Emirates in the coming years.
- Central Board of Direct Taxes (CBDT) launched a portal to invite suggestions from the public.
- The Income Tax department invited public inputs for review of the six-decade old I-T Act with regard to simplification of language, litigation reduction, compliance reduction, and obsolete provisions.
- RBI entered into a currency swap agreement with the Maldives Monetary Authority (MMA) under the SAARC Currency Swap Framework for 2024-2027.
- SEBI extended the timeline to January 2025 for social enterprises, which have registered or mobilised funds through social stock exchange, to submit annual disclosures and 'annual impact report' for the financial year 2023-24.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.59	7.67	8.41	8.46	9.75
3-Yr	6.71	7.49	8.23	8.28	9.57
5-Yr	6.76	7.34	8.19	8.24	9.53
10-Yr	6.85	7.23	8.08	8.13	9.42

* Weighted average yields



Global Indices	Oct 07	1D % Chg	3M % Chg	1Y % Chg
DJIA	41954	-0.94	6.55	25.58
Nasdaq	17924	-1.18	-2.34	33.45
FTSE 100	8304	0.28	1.22	10.80
DAX	19104	-0.09	3.40	25.44
Nikkei 225	39333	1.80	-3.86	26.90
Hang Seng	23100	1.60	29.78	32.10
KOSPI	2610	1.58	-8.80	8.37

Global 10 yr Sov. Yields (%)	Oct 07	1D Ago	3M Ago	1Y Ago
US	4.03	3.98	4.28	4.78
UK	4.21	4.13	4.13	4.58
German	2.25	2.21	2.53	2.89
Japan	0.925	0.90	1.07	0.80

Commodity Prices	Oct 07	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	80.93	78.05	86.54	84.58
NYMEX Crude Oil (\$/bbl)	77.14	74.38	83.16	82.79
Gold (Rs / 10 gm)#	75933	75964	72640	56539

ibjrates spot prices

Currencies Vs INR	Oct 07	1D Ago
USD	83.97	83.97
GBP	110.10	110.56
Euro	92.19	92.58
100 Yen	56.69	57.33
Forex Reserve (\$ bn)*	704.89	692.30

* Data pertains to Sep 27 and to Sep 20 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

- HDFC Bank's board approved the sale of a 100% stake in HDFC Education and Development Services to Vama Sundari Investments (Delhi) for Rs 192 crore.
- Northern Arc launched a Category II AIF fund, Finserv Fund and plans to raise Rs 1,500 crore.
- XDLINX Space Labs raised \$7 million in a seed funding round.
- Suraksha Diagnostic Ltd received Sebi's go ahead to raise funds through an initial public offering (IPO).
- Nayan Tech raised \$2 million from investors led by Beenext.

Global Equity

- Wall Street closed lower on Monday due to concerns over geopolitical tensions impacting oil prices.
- 10-year US bond yield ended higher at 4.03% amid diminishing hopes of aggressive Fed rate cuts and strong labor market data.
- FTSE index closed higher on Monday driven by energy stocks and a softer labour market report.
- Asian markets were trading lower at 8.30 AM.

International

- Eurozone retail sales increased 0.8% in August compared to a 0.1% decrease in July.
- UK Halifax House Price Index increased 4.7% on year in September, following an 4.3% rise in August.
- Japan Coincident Index fell to 113.5 in August from 117.3 in July, and the leading economic index decreased to 106.7 from a marginally revised 109.3.
- Japan Household spending declined by 1.9% in August compared to 0.1% rise in the previous month.
- Japan's current account surplus increased to 3,803.6 billion yen in August from 2,293.8 billion yen in the same month a year earlier.

Upcoming market indicators

- US FOMC Minutes (October 9)
- India RBI Interest Rate Decision (October 9)
- US Inflation, September (October 10)
- US CPI, September (October 10)
- US PPI/Core PPI, September (October 11)
- UK GDP, August (October 11)
- UK Industrial/Manufacturing Production, August (October 11)
- UK Balance of trade, August (October 11)
- India Industrial/manufacturing Production, August (October 11)