

Broad Indices	Oct 11	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81381	-0.28	1.86	22.43	23.88
Nifty 50	24964	-0.14	2.67	26.01	23.47
BSE Mid cap	48437	0.44	1.73	50.31	42.40
Nifty Midcap 100	59213	0.47	3.61	46.25	43.90

Sectoral Indices	Oct 11	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59701	-0.45	3.85	62.74
BSE Bankex	58264	-0.61	-3.02	16.31
BSE CD	65606	0.50	10.62	42.03
BSE CG	71580	0.10	-5.04	49.24
BSE FMCG	22614	0.02	4.82	19.57
BSE Healthcare	44445	0.85	15.63	57.88
BSE IT	42827	0.59	12.17	30.14
BSE Metal	33648	1.25	1.79	45.92
BSE Oil & Gas	30158	0.64	-2.63	61.24
BSE Power	8420	-0.38	3.89	85.95
BSE Realty	8126	-0.74	-6.29	66.60

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Trent	2.57	M&M	-1.88
Hindalco	2.36	TCS	-1.85
HCL Tech	1.71	ICICI Bank	-1.65
Tech Mahindra	1.69	Cipla	-1.43
ONGC	1.32	Maruti Suzuki	-1.29

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 10	MF Inv Oct 04	DII Inv Oct 11
Buy	10098	16694	11907
Sell	14835	8976	8176
Net	-4737	7718	3731
Net (YTD)	39803	295213	399855

Policy rates	Oct 11	1W Ago
Repo (%)	6.50	6.50
Reverse repo (%)	3.35	3.35
CRR (%)	4.50	4.50
Overnight rates	Oct 11	1W Ago
Call (%)	5.85	6.25
10 Yr Gilt(%)^	6.79	6.83
TREP (%)	6.25	6.28
Short-term debt	Oct 11	1W Ago
3-month CPs (%)	7.43	7.60
6-month CPs (%)	7.70	7.75
3-month CDs (%)	7.10	7.20
6-month CDs (%)	7.35	7.43
182-day T-bill (%)^	6.52	6.54
364-day T-bill (%)^	6.52	6.54
Long-term debt	Oct 11	1W Ago
3-Y G-sec (%)	6.65	6.70
5-Y G-sec (%)	6.69	6.74
10-Y G-sec (%)	6.79	6.83

^Weighted average yield

### Indian Equity

- Indian equities ended lower on Friday led by losses in IT sector following a weaker-than-expected quarterly earnings from a major tech firm.
- The top losers were Mahindra & Mahindra, TCS, ICICI Bank, Cipla and Maruti Suzuki, down 1.29-1.88%.
- The top gainers were Trent, Hindalco, HCL Tech, Tech Mahindra and ONGC, up 1.32-2.57%.

### Indian Debt

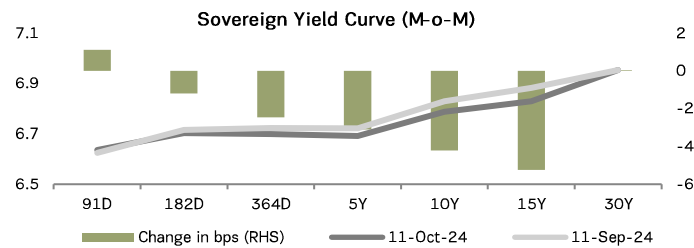
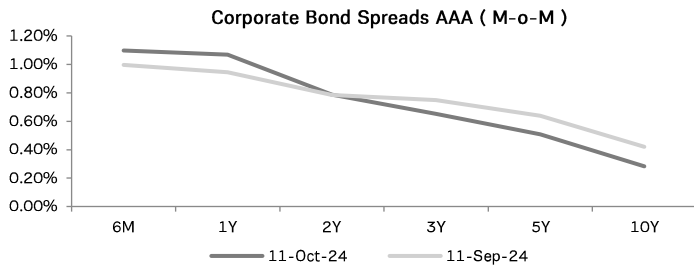
- The interbank call money rate ended higher at 5.85% on Friday compared to 5.75% on Thursday.
- Government bond prices ended lower on Friday due to the rally in the US treasury yield after data showed a rise in consumer price index.
- The yield of the new 10-year benchmark 07.10% 2034 paper ended higher at 6.79% on Friday compared to 6.77% on Thursday.

### Economy and Government

- India's Industrial Production slowed down to -0.10% in August compared to 4.7% rise in July while the Manufacturing Production eased 1% from 4.6%.
- India's foreign exchange reserves declined \$3.709 billion to \$701.176 billion in the week ended October 4.
- The Indian government approved a new missile testing range in Nagayalanka, Andhra Pradesh.
- The government imposed import curbs on parts of pocket lighters with immediate effect.
- The US and India have announced grants of over USD 2 million for joint research projects aimed at advancing artificial intelligence (AI) and quantum technologies for social good.
- The Union Government has released the first instalment of the 15th Finance Commission grants for 2024-25 to Rural Local Bodies (RLBs) in Andhra Pradesh and Rajasthan.
- Maharashtra Deputy Chief Minister Devendra Fadnavis inaugurated an advanced cybercrime command centre in Navi Mumbai and said it would enhance online security in the state.
- Delhi Minister Gopal Rai approved 100 new schemes, including for roads, drains and playgrounds, worth Rs 93 crores to boost development of villages.
- Commerce and Industry Minister Piyush Goyal said The European Union's (EU) deforestation regulation and carbon tax are unfair and would impact Indian industries.
- The National Bank for Agriculture and Rural Development (Nabard) sanctioned Rs 770 crore financial assistance for the construction of two irrigation projects in Jharkhand.
- PwC India has announced a collaboration with Meta to expand and scale its open-source AI solutions to enterprises and citizen services on Meta's Llama models.
- The Finance Minister has approves upgradation of Hindustan Aeronautics Limited (HAL) to 14th Maharatna CPSE.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.57	7.59	8.33	8.38	9.67
3-Yr	6.65	7.41	8.15	8.20	9.49
5-Yr	6.69	7.31	8.16	8.21	9.50
10-Yr	6.79	7.18	8.03	8.08	9.37

\* Weighted average yields



Global Indices	Oct 11	1D % Chg	3M % Chg	1Y % Chg
DJIA	42864	0.97	7.82	26.80
Nasdaq	18343	0.33	0.33	34.29
FTSE 100	8254	0.19	0.37	8.32
DAX	19374	0.85	4.53	25.32
Nikkei 225	39606	0.57	-6.20	24.01
Hang Seng	Closed	NA	NA	NA
KOSPI	2597	-0.09	-10.18	5.99

Global 10 yr Sov. Yields (%)	Oct 11	1D Ago	3M Ago	1Y Ago
US	4.08	4.09	4.20	4.60
UK	4.208	4.22	4.08	4.37
German	2.274	2.25	2.47	2.72
Japan	0.956	0.95	1.09	0.75

Commodity Prices	Oct 11	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	79.04	79.4	85.4	85.82
NYMEX Crude Oil (\$/bbl)	75.56	75.85	82.62	83.49
Gold (Rs / 10 gm)#	75623	74838	72563	57860

# ibjarates spot prices

Currencies Vs INR	Oct 11	1D Ago
USD	84.07	83.97
GBP	109.89	109.82
Euro	91.98	91.81
100 Yen	56.45	56.41
Forex Reserve (\$ bn)*	701.18	704.89

\* Data pertains to Oct 04 and to Sep 27 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

- Oberoi Realty's board of directors approved raising up to Rs 6,000 crore in one or more tranches.
- JSW Infrastructure issued and allotted Commercial Paper aggregating to an amount of Rs 1,000 crore.
- Godrej Properties acquired six new land parcels in the July-September quarter to develop housing projects worth Rs 9,650 crore as part of its expansion plan amid strong demand.

## Global Equity

- Wall Street ended higher on Friday, boosted by strong earnings from major banks and positive inflation data fueled expectations for a potential Federal Reserve rate cut.
- 10-year US bond yield ended almost flat at 4.08%.
- FTSE index ended marginally higher as investors were cautious after China's stimulus measures.
- Asian markets were trading higher at 8.30 AM.

## International

- US Producer prices rose 1.8% on year in September, compared to an upwardly revised 1.9% increase in August while the Core Producer Prices increased to 2.80% from 2.40%.
- US Michigan Consumer Sentiment Prel declined to 68.9 in October, from a five-month high of 70.1 in September.
- UK economy expanded 1% on year in August, following a downwardly revised 0.9% rise in July.
- UK industrial production decreased 1.60% on year in August compared to revised 2.2% fall in the previous month.
- China's annual inflation rate stood at 0.4% in September from 0.6% in August.
- China's producer prices declined by 2.8% year-on-year in September 2024, steeper than a 1.8% fall in the previous month.

## Upcoming market indicators

- India Inflation Rate, September (October 14)
- India WPI inflation, September (October 14)
- Eurozone Industrial production, August (October 15)
- Eurozone ZEW Economic Sentiment Index, October (October 15)
- UK Unemployment Rate, August (October 15)
- China PBoC 1-Year MLF Announcement (October 15)
- Japan Industrial Production, August (October 15)
- India Balance of Trade, September (October 15)
- UK Inflation Rate, September (October 16)
- UK PPI Output/Input, September (October 16)
- UK Retail Prices Index, September (October 16)