

Broad Indices	Nov 5	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	79477	0.88	0.91	23.48	23.06
Nifty 50	24213	0.91	0.66	25.91	22.55
BSE Mid cap	45897	0.48	-0.13	44.62	40.13
Nifty Midcap 100	56115	0.59	0.46	41.75	42.40

Sectoral Indices	Nov 5	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	54066	0.81	-3.20	48.30
BSE Bankex	59521	2.09	4.53	21.57
BSE CD	60629	0.37	3.91	33.76
BSE CG	68635	0.16	-2.57	48.48
BSE FMCG	21466	-0.17	-3.39	14.49
BSE Healthcare	43929	0.17	9.64	58.25
BSE IT	40448	-0.05	3.18	29.14
BSE Metal	31703	2.38	4.32	41.78
BSE Oil & Gas	27298	1.08	-12.11	45.88
BSE Power	7750	0.21	-4.78	73.47
BSE Realty	7695	0.68	-0.76	50.75

Nifty			
Top Out performers	% Change	Top Under performers	% Change
JSW Steel	4.67	Coal India	-1.89
Bajaj Auto	3.67	Adani Ports	-1.47
Tata Steel	3.63	Trent	-1.35
Hindalco	3.45	Asian Paints	-0.96
Axis Bank	2.85	ITC Ltd.	-0.91

Foreign & Domestic flows	FII Inv	MF Inv	DII Inv
Rs. Cr (Equity)	Nov 4	Nov 4	Nov 5
Buy	15218	9402	12617
Sell	19780	8011	9586
Net	-4562	1391	3031
Net (YTD)	-4408	361795	454907

Policy rates	Nov 5	1W Ago	M Ago	3M Ago
Repo (%)	6.50	6.50	6.50	6.50
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.50	4.50	4.50	4.50
Overnight rates	Nov 5	1W Ago	M Ago	3M Ago
Call (%)	5.95	6.50	6.25	5.75
10 Yr Gilt(%)^	6.80	6.85	6.83	6.86
TREP (%)	6.25	6.36	6.28	6.26
Short-term debt	Nov 5	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.55	7.52	7.60	7.64
6-month CPs (%)	7.80	7.75	7.75	7.81
3-month CDs (%)	7.14	7.20	7.20	7.18
6-month CDs (%)	7.38	7.40	7.43	7.44
182-day T-bill (%)^	6.58	6.59	6.54	6.72
364-day T-bill (%)^	6.56	6.59	6.54	6.75
Long-term debt	Nov 5	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.73	6.75	6.70	6.77
5-Y G-sec (%)	6.76	6.77	6.74	6.78
10-Y G-sec (%)	6.80	6.85	6.83	6.86

^Weighted average yield

Indian Equity

- Indian equities ended higher on Tuesday as investors bought undervalued heavyweight financial stocks ahead of the US presidential elections.
- The top gainers were JSW Steel, Bajaj Auto, Tata Steel, Hindalco and Axis Bank, up 2.85-4.67%.
- The top losers were Coal India, Adani Ports, Trent, Asian Paints and ITC, down 0.91-1.89%.

Indian Debt

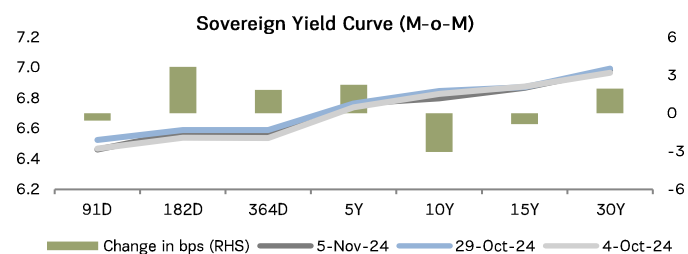
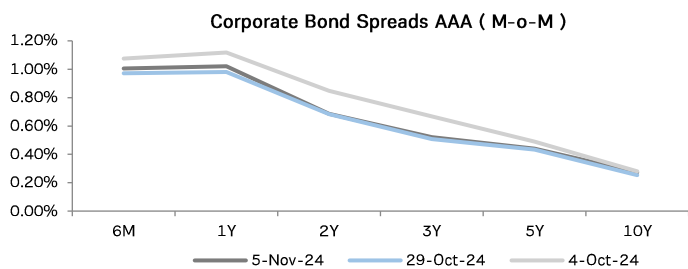
- The interbank call money rate closed higher at 5.95% on Tuesday compared to 5.75% on Monday.
- Government bond prices closed flat on Tuesday as investors remained on the edges ahead of the US presidential elections.
- The yield of the new 10-year benchmark 07.10% 2034 paper closed flat at 6.83% on Tuesday.
- Meanwhile, the new 10-year benchmark 06.79% GS 2034 paper closed at 6.79% on Tuesday.

Economy and Government

- The finance ministry asked public sector banks (PSBs) to mobilise low-cost current and savings account deposits to accelerate the pace of sustainable credit growth, and to align their digital and cybersecurity frameworks with industry best practices to ensure customer protection and operational continuity.
- The Central Board of Direct Taxes (CBDT) introduced monetary limits for waiving or reducing interest on tax payments.
- The corporate affairs ministry emphasized continuous refinement of the Insolvency and Bankruptcy Code to address future challenges in corporate restructuring.
- The government put forward a proposal to consolidate the country's regional rural banks from 43 down to 28.
- The government launched phase-II retail sales of wheat flour and rice under the Bharat brand at subsidised rates to provide relief to consumers from high prices.
- The government launched digi platform to empower artisans from marginalised sections.
- The Food Safety and Standards Authority of India (FSSAI) has tightened antibiotics residue norms for meat and meat products, milk and milk products, poultry, eggs and aquaculture, lowering the permissible levels and placing more drugs on its watch list.
- The Insolvency and Bankruptcy Board of India (IBBI) proposed revised regulations that would provide operational creditors the option to pursue voluntary mediation before initiating insolvency proceedings against a company.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.72	7.59	8.33	8.38	9.67
3-Yr	6.73	7.37	8.11	8.16	9.45
5-Yr	6.76	7.32	8.17	8.22	9.51
10-Yr	6.80	7.19	8.04	8.09	9.38

* Weighted average yields



Global Indices	Nov 5	1D % Chg	3M % Chg	1Y % Chg
DJIA	42222	1.02	9.09	23.96
Nasdaq	18439	1.43	13.82	36.81
FTSE 100	8172	-0.14	2.05	10.17
DAX	19256	0.57	11.06	26.78
Nikkei 225	38475	1.11	22.30	20.42
Hang Seng	21007	2.14	25.80	18.92
KOSPI	2577	-0.47	5.54	8.81

Global 10 yr Sov. Yields (%)	Nov 5	1D Ago	3M Ago	1Y Ago
US	4.26	4.31	3.78	4.56
UK	4.53	4.46	3.87	4.33
German	2.43	2.39	2.18	2.64
Japan	0.93	0.94	0.90	0.91

Commodity Prices	Nov 5	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	75.53	75.08	76.3	84.89
NYMEX Crude Oil (\$/bbl)	71.99	71.47	72.94	80.51
Gold (Rs / 10 gm)#	78566	78518	69117	61075

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Currencies Vs INR	Nov 5	1D Ago	M Ago	3M Ago
USD	84.10	84.11	83.97	83.85
GBP	109.20	109.11	110.56	106.85
Euro	91.62	91.65	92.58	91.83
100 Yen	55.26	55.38	57.33	58.92
Forex Reserve (\$ bn)*	684.81	688.27	704.89	667.39

* Data pertains to Oct 25 and to Oct 18 respectively Source: CRISIL

Key Macro Indicators	
CPI	5.49% (September-2024)
WPI	1.84% (September -2024)
IIP	-0.1% (August -2024)
GDP Growth Rate	6.7% (April-June FY25)

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Capital Market

- NTPC's board has approved investment proposals totaling Rs 80,000 crore for thermal power projects with an overall capacity of 6,400 MW
- Marut Dronetech raised \$6.2 million in Series A funding from impact investor Lok Capital for key initiatives.
- QubeHealth raises Rs 270 cr pre-series A funding from UIV, CanBank.

Global Equity

- Wall Street ended higher on Tuesday driven by strong economic data, though election uncertainty kept investors cautious.
- 10-year US bond yield ended lower at 4.26% after auction results showed strong demand for bond and ahead of the US presidential elections results.
- FTSE index ended lower on Tuesday weighed down by AstraZeneca's decline and as investors stayed cautious on US election day.
- Asian markets were trading higher at 8.30 AM.

International

- US trade deficit widened to \$84.4 billion in September, the highest since April 2022 and compared to a downwardly revised \$70.8 billion shortfall in August.
- US S&P Global US Composite PMI edged up to 54.1 in October from 54.0 in September while Services PMI was revised slightly lower to 55 compared to 55.2.
- US ISM Services PMI unexpectedly jumped to 56 in October 2024, the highest since August 2022, from 54.9 in September.
- UK S&P Global Services PMI rose to 52 in October compared to 52.4 in September while Composite PMI fell to 51.8 in October, down from 52.6 in September.
- Japan Jibun Bank Services PMI decreased to 49.7 in October compared to 53.1 in September while Japan Jibun Bank Composite PMI fell to 49.6 from 52.

Upcoming market indicators

- US S&P Global Composite/Services PMI, October (November 06)
- Eurozone PPI, September (November 06)
- Eurozone HCOB Composite/Services PMI, October (November 06)
- UK S&P Global Construction PMI October (November 06)
- Japan BoJ Monetary Policy Meeting Minutes (November 06)
- Japan Jibun Bank Services/Composite PMI, October (November 06)
- US Initial Jobless Claims, November 02 (November 07)
- Eurozone Retail Sales, September (November 07)
- UK BoE Interest Rate Decision (November 07)
- US Fed Interest Rate Decision (November 07)
- China Inflation Rate, October (November 08)
- China PPI, October (November 08)
- India Industrial/manufacturing Production, September (November 12)
- India Inflation Rate, October (November 12)