

Broad Indices	Oct 06	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81790	0.72	-1.97	0.12	22.62
Nifty 50	25078	0.74	-1.51	0.25	22.18
BSE Mid cap	45988	0.68	-1.76	-4.00	32.68
Nifty Midcap 100	58015	0.89	-2.79	-0.79	33.55

Sectoral Indices	Oct 06	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	59900	0.32	11.71	2.32
BSE Bankex	63432	1.10	-0.36	8.63
BSE CD	58638	-0.02	-4.07	-10.96
BSE CG	69564	0.15	-3.81	-1.05
BSE FMCG	20261	-0.19	0.42	-11.96
BSE Healthcare	43983	1.05	-2.03	0.96
BSE IT	34207	1.96	-10.73	-19.25
BSE Metal	33736	-0.92	5.90	-1.58
BSE Oil & Gas	27360	0.98	-3.51	-10.32
BSE Power	6799	-0.14	-0.71	-18.63
BSE Realty	6853	0.64	-9.12	-14.95

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Max Healthcare	6.59	Tata Steel	-1.82
Shriram Finance	3.97	Adani Ports	-1.44
TCS	2.98	Power Grid Corp	-0.97
Apollo Hospital	2.85	Eicher Motors	-0.89
Tech Mahindra	2.76	ITC	-0.88

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 03	MF Inv Oct 1	DII Inv Oct 06
Buy	18292	11376	15516
Sell	19876	8521	10634
Net	-1584	2855	4882
Net (YTD)	-154595	402483	567439

Policy rates	Oct 06	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.50	5.50	5.50
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	4.00	4.00	4.00	4.00
Overnight rates	Oct 06	1W Ago	M Ago	3M Ago
Call (%)	5.00	5.00	5.00	4.75
10 Yr Gilt(%)^	6.52	6.56	6.46	6.30
TREP (%)	5.25	5.25	5.10	5.00
Short-term debt	Oct 06	1W Ago	M Ago	3M Ago
3-month CPs (%)	6.51	6.57	6.45	6.20
6-month CPs (%)	6.67	6.68	6.55	6.40
3-month CDs (%)	5.84	5.93	5.81	5.78
6-month CDs (%)	6.19	6.17	6.13	6.00
182-day T-bill (%)^	5.54	5.54	5.60	5.48
364-day T-bill (%)^	5.55	5.58	5.63	5.53
Long-term debt	Oct 06	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.91	5.93	6.07	5.83
5-Y G-sec (%)	6.12	6.20	6.22	6.06
10-Y G-sec (%)	6.52	6.56	6.46	6.30

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Monday, supported by banking and financial stocks following strong quarterly loan growth, while IT stocks gained ahead of earnings announcements for the second quarter of this fiscal.
- The top gainers were Max Healthcare, Shriram Finance, TCS, Apollo Hospital, and Tech Mahindra, rising 2.76-6.59%.
- The top losers were Tata Steel, Adani Ports, Power Grid Corporation of India, Eicher Motors and ITC, falling 0.88-1.82%.

Indian Debt

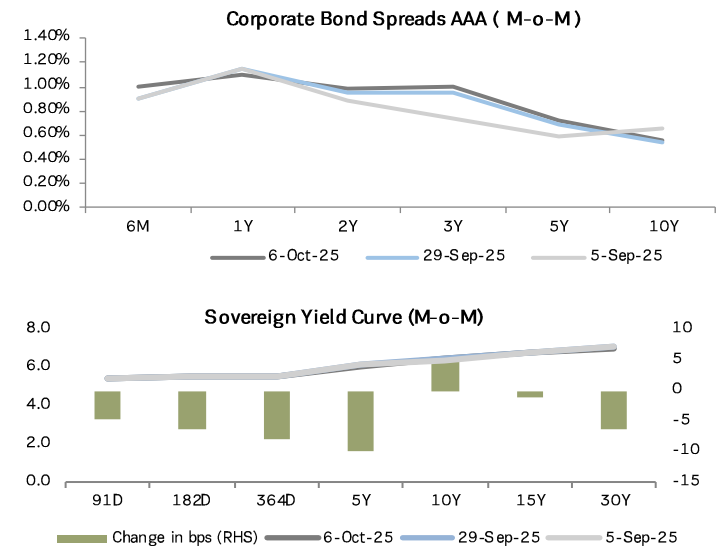
- The interbank call money rate ended lower at 5.00% on Monday compared to 5.45% on Friday.
- Government bond prices declined marginally on Monday as earlier gains, due to lower-than-expected quarterly borrowing announced by states, were capped by profit booking.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended higher at 6.52% on Monday compared to 6.51% on Friday.

Economy and Government

- India's HSBC services activity expanded for the twenty-sixth consecutive month in September, though the pace of growth eased to 60.9 from 62.9 in August while composite PMI eased to 61.0 from 63.2.
- Crisil said that gross non-performing assets (NPAs) of banks are likely to have bottomed out and are expected to remain in the 2.3-2.5% range by March 31, 2026. Bad loans had reached a historic low of 2.3% as of March 31, 2025.
- Government has begun early-stage talks with local insurers about designing a nationwide climate-linked insurance programme aimed at simplifying the payout process after extreme weather events such as heatwaves and floods.
- Tamil Nadu CM M.K. Stalin announced 20% bonus and ex-gratia for 'C' and 'D' category workers and employees in all state public sector undertakings (PSUs).
- Bihar Chief Minister Nitish Kumar inaugurated the first phase of the 3.6-km elevated stretch of the priority corridor of the Patna Metro rail project.
- The Competition Commission of India (CCI), in its latest market study on artificial intelligence (AI), has called for responsible autonomy while urging enterprises to include self-audit of AI systems to address potential competition concerns.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.61	6.65	7.36	7.40	8.63
3-Yr	5.80	6.89	7.60	7.64	8.87
5-Yr	6.12	6.93	7.74	7.77	9.01
10-Yr	6.52	7.17	7.98	8.01	9.25

* Weighted average yields



Global Indices	Oct 06	1D % Chg	3M % Chg	1Y % Chg
DJIA	46695	-0.14	4.16	10.25
Nasdaq	22942	0.71	11.36	26.49
FTSE 100	9479	-0.13	7.44	14.47
DAX	24378	0.00	2.48	27.50
Nikkei 225	47945	4.75	20.43	24.09
Hang Seng	26958	-0.67	12.72	18.56
KOSPI	Closed	NA	NA	NA

Global 10 yr Sov. Yields (%)	Oct 06	1D Ago	3M Ago	1Y Ago
US	4.18	4.13	4.35	3.98
UK	4.735	4.70	4.55	4.13
German	2.7174	2.70	2.57	2.21
Japan	1.686	1.66	1.44	0.90

Commodity Prices	Oct 06	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.47	64.53	68.3	78.05
NYMEX Crude Oil (\$/bbl)	61.69	60.88	NA	74.38
Gold (Rs / 10 gm)#	119249	116954	97021	75964

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Currencies Vs INR	Oct 06	1D Ago	M Ago	3M Ago
USD	88.79	88.78	88.32	85.39
GBP	119.33	119.32	118.92	116.78
Euro	103.99	104.08	103.08	100.60
100 Yen	59.09	60.16	59.59	59.18
Forex Reserve (\$ bn)*	700.24	702.57	694.23	702.78

* Data pertains to Sep 26 and Sep 19 respectively Source: CRISIL

Key Macro Indicators	
CPI	2.07% (Aug-2025)
WPI	0.52% (Aug-2025)
IIP	4.0% (Aug -2025)
GDP Growth Rate	7.8% (Apr-Jun FY26)

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Capital Market

- Lenskart Solutions received approval from the Securities and Exchange Board of India (SEBI) to raise Rs 2,150 crore through an initial public offering (IPO)
- Mann Fleet Partners filed its draft papers with markets regulator Sebi to raise funds through an Initial Public Offering (IPO).
- Advit Jewels filed its Draft Red Herring Prospectus (DRHP) with Sebi for its proposed initial public offering (IPO).
- Tata Capital, LG Electronics to launch IPOs worth over Rs 27,000 cr.
- Adani Group plans to invest an additional Rs 30,000 crore to expand the Navi Mumbai International Airport
- ONGC to invest Rs 8,110 cr to develop 172 onshore wells in Andhra, gets 'green nod' from EAC.
- Hero Future Energies secured Rs 1,908 crore in funding from public lenders State Bank of India and Canara Bank.
- Eli Lilly plan to invest over \$1 billion in India to boost manufacturing and supply through local drugmakers, increasing the availability of key drugs like Mounjaro.
- Jindal Stainless set up a steel fabrication unit in Maharashtra, with an initial investment of Rs 125 crore.
- Ceigall India received a Letter of Award worth Rs 712 crore from Maharashtra State Electricity Distribution Co. Ltd.
- SBI Life Insurance, Aditya Birla MF, Morgan Stanley, Goldman Sachs, and other entities have cumulatively acquired over 7.31 crore shares in Aditya Birla Lifestyle Brands from Flipkart Investments for Rs 998 crore through open market transactions.

Global Equity

- Wall Street stocks ended mixed on Monday with Nasdaq gaining as artificial intelligence-related dealmaking boosted rally in chip stocks while Dow Jones declined on concerns regarding a potential prolonged US government shutdown.
- 10-year US bond yield ended higher at 4.18% as the US government shutdown continued and investors monitored the state of the economy.
- FTSE index declined on Monday led by selloff in shares of Mondi following disappointing results and due to an unexpected resignation of France's new prime minister Sebastian Lecornu and his government.
- Asian markets were trading mixed at 8.30 AM.

International

- Eurozone retail sales rose by 1.0% year-over-year in August 2025, easing from a 2.1% growth in the previous month.
- Eurozone S&P Global Construction PMI fell to 46 in September 2025, from 46.7 in the previous month
- UK S&P Global Construction PMI rose to 46.2 in September 2025 from 45.5 in August.
- Japan household spending increased by 2.3% yoy in August accelerating from a 1.4% growth in the previous month.

Upcoming market indicators

- US Export/Import, Sep (Oct 07)
- UK Halifax House Price Index, Sep (Oct 07)
- Japan household spending, August (Oct 07)
- Japan Bank Lending, Sep (Oct 08)