

Broad Indices	Oct 07	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	81927	0.17	-1.82	1.08	22.66
Nifty 50	25108	0.12	-1.39	1.26	22.20
BSE Mid cap	46196	0.45	-1.17	-1.75	32.92
Nifty Midcap 100	58289	0.47	-2.06	1.73	33.71

Sectoral Indices	Oct 07	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	60050	0.25	12.16	2.97
BSE Bankex	63332	-0.16	-0.38	10.78
BSE CD	58803	0.28	-3.68	-8.99
BSE CG	69522	-0.06	-3.44	1.06
BSE FMCG	20161	-0.49	-1.55	-11.75
BSE Healthcare	44058	0.17	-1.83	2.17
BSE IT	34121	-0.25	-10.37	-19.71
BSE Metal	33637	-0.29	6.23	0.38
BSE Oil & Gas	27489	0.47	-3.36	-7.70
BSE Power	6807	0.12	-0.90	-15.88
BSE Realty	6928	1.09	-8.18	-13.02

Nifty			
Top Out performers	% Change	Top Under performers	% Change
Bharti Airtel	1.36	Axis Bank	-2.14
Bajaj Auto	1.27	Tata Motors	-2.05
Jio Financial	1.19	TATA Cons. Prod	-1.94
Eicher Motors	1.12	Trent	-1.91
HCL Tech	1.11	Adani Enterpris	-1.22

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 06	MF Inv Oct 01	DII Inv Oct 07
Buy	11218	11376	14572
Sell	12689	8521	13808
Net	-1472	2855	764
Net (YTD)	-156066	402483	568203

Policy rates	Oct 07	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 07	1W Ago	M Ago	3M Ago
Call (%)	5.00	5.00	5.00	4.90
10 Yr Gilt(%)^	6.51	6.57	6.46	6.30
TREP (%)	5.16	5.50	5.10	5.26
Short-term debt	Oct 07	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	5.83	5.81	5.73
6-month CDs (%)	6.19	6.09	6.13	6.00
182-day T-bill (%)^	5.54	5.53	5.60	5.41
364-day T-bill (%)^	5.55	5.56	5.63	5.52
Long-term debt	Oct 07	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	5.90	5.93	6.07	5.81
5-Y G-sec (%)	6.11	6.21	6.22	6.05
10-Y G-sec (%)	6.51	6.57	6.46	6.30

^Weighted average yield

## Indian Equity

- Indian equity benchmarks closed higher on Tuesday, led by gains in financial stocks amid optimism around the Reserve Bank of India's new lending reforms and expectations of upbeat corporate updates ahead of second quarter earnings.
- The top gainers were Bharti Airtel, Bajaj Auto, Jio Financial, Eicher Motors, and HCL Tech, up 1.11-1.36%.
- The top losers were Axis Bank, Tata Motors, TATA Consumer Products, Trent, and Adani Enterprises, down 1.22-2.14%.

## Indian Debt

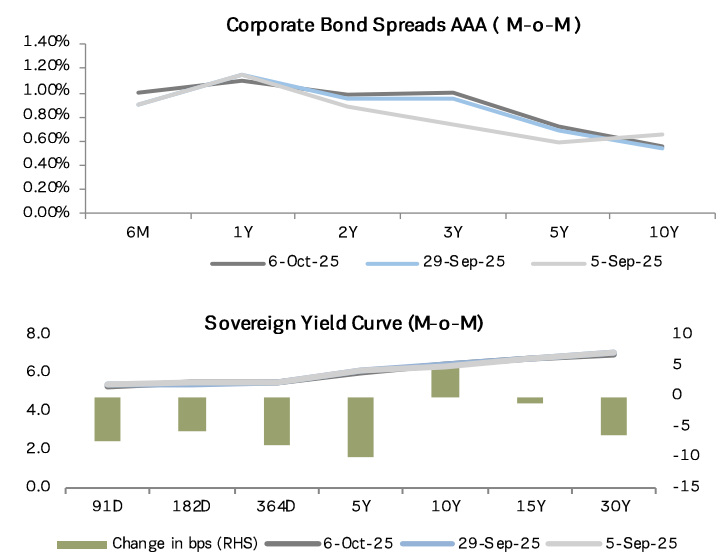
- The interbank call money rate ended flat at 5.00% on Tuesday.
- Government bond prices ended higher on Tuesday on strong demand for state debt.
- The yield of the new 10-year benchmark 06.33% GS 2035 paper ended lower at 6.51% on Tuesday compared to 6.52% on Monday.

## Economy and Government

- Prime Minister Narendra Modi will inaugurate the Navi Mumbai International Airport (NMIA) in Maharashtra.
- Finance Minister Nirmala Sitharaman launched a foreign currency settlement system in GIFT City.
- The Union Cabinet approved four major railway projects worth Rs 24,634 crore to boost capacity and connectivity across central India.
- Delhi government is set to prohibit property registrations in case outstanding property bills are not cleared.
- Tamil Nadu Chief Minister M K Stalin launches AeroDefCon 2025, TN eyes Rs 75,000 cr investment by 2032.
- The Maharashtra Cabinet approved a new gems and jewellery policy that targets to attract Rs 1 lakh crore investment and create five lakh employment opportunities in the key sector.
- Assocham president Sanjay Nayar said the recent goods and services tax (GST) relief, on top of the income tax breather this year, may offer private firms what they want in times of Trump tariffs-a secular rise in domestic consumption.
- The Reserve Bank of India (RBI) will launch a pilot on deposit tokenisation on Wednesday.
- The National Payments Corporation of India (NPCI) has set up a new subsidiary, NPCI Tech Solutions Limited (NTSL), to drive experimentation and breakthrough innovations in the fintech sector.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	5.60	6.62	7.33	7.37	8.60
3-Yr	5.79	6.86	7.57	7.61	8.84
5-Yr	6.11	6.90	7.71	7.74	8.98
10-Yr	6.51	7.14	7.95	7.98	9.22

\* Weighted average yields



Global Indices	Oct 07	1D % Chg	3M % Chg	1Y % Chg
DJIA	46603	-0.20	4.95	11.08
Nasdaq	22788	-0.67	11.64	27.14
FTSE 100	9484	0.05	7.69	14.21
DAX	24386	0.03	1.30	27.65
Nikkei 225	47951	0.01	21.13	21.91
Hang Seng	Closed	NA	NA	NA
KOSPI	Closed	NA	NA	NA

Global 10 yr Sov. Yields (%)	Oct 07	1D Ago	3M Ago	1Y Ago
US	4.14	4.18	4.40	4.03
UK	4.721	4.74	4.58	4.21
German	2.7107	2.72	2.61	2.25
Japan	1.671	1.69	1.47	0.93

Commodity Prices	Oct 07	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	65.45	65.47	69.58	80.93
NYMEX Crude Oil (\$/bbl)	61.73	61.69	67.93	77.14
Gold (Rs / 10 gm)#	119941	119249	96596	75933

# ibjارات spot prices

Currencies Vs INR	Oct 07	1D Ago	M Ago	3M Ago
USD	88.73	88.79	88.32	85.82
GBP	119.38	119.33	118.92	116.76
Euro	103.71	103.99	103.08	100.86
100 Yen	58.90	59.09	59.59	59.15
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

- Sai Parenteral's files DRHP for IPO, aims to raise Rs 285-cr via fresh issue.
- Anantam Highways Trust raises Rs 180 cr as IPO.
- TrusTerra raises Rs 9 crore pre-seed led by Finvolve and India Accelerator.
- Solex Energy announced it had received NSE's approval to migrate equity shares from the NSE EMERGE Platform to the main board platform of NSE.
- Biocon gets USFDA's tentative approval for antibacterial drug Rifaximin.

## Global Equity

- Wall Street stocks closed ended lower on Tuesday after a consumer expectations survey from the New York Federal Reserve showed weakening future expectations and rising inflation projections.
- 10-year US bond yield ended lower at 4.14% amid lack of any progress in resolving the standoff between Republicans and Democrats that's shut down the government.
- FTSE index ended flat on Tuesday as gains buoyed by rally in energy stocks were offset by selloffs in retailer's stocks.
- Asian markets were trading lower at 8.30 AM.

## International

- US consumer inflation expectations for the year ahead rose to 3.4% in September 2025, the highest in five months, compared to 3.2% in August.
- UK Halifax House Price Index rose 1.3% on year in September, easing from a 2% gain in August.
- Japan's leading economic index rose to 107.4 in August 2025, up from July's 106.1.
- Japan's coincident economic index fell to 113.4 in August 2025 from 114.1 in the previous month.

## Upcoming market indicators

- Japan Bank Lending, Sep (Oct 08)
- US FOMC Minutes (Oct 09)
- US Initial Jobless Claims, Oct/04 (Oct 09)
- China PPI, Aug (Oct 09)
- UK Industrial Production, Aug (Oct 10)
- Japan PPI, Sep (Oct 10)
- India Foreign Exchange Reserves, Oct/03 (Oct 10)
- China balance on trade, Sep (Oct 13)
- India Inflation Rate, Sep (Oct 13)
- UK Unemployment Rate, Aug (Oct 14)
- India WPI Inflation, Sep (Oct 14)