

Broad Indices	Oct 13	1D % Chg	3M % Chg	1Y % Chg	PE
BSE Sensex	73034	1.54	-5.90	-11.29	19.07
Nifty 50	22722	1.60	-6.15	-9.93	19.41
BSE Mid cap	45830	0.96	-5.46	-0.97	NA
Nifty Midcap 100	59459	1.06	-0.10	1.19	28.04

Sectoral Indices	Oct 13	1D % Chg	3M % Chg	1Y % Chg
BSE Auto	56259	1.26	-5.59	-5.51
BSE Bankex	62439	0.93	-5.08	-2.35
BSE CD	57970	1.50	-7.05	-2.09
BSE CG	74608	0.48	-4.90	8.18
BSE FMCG	17033	1.22	-6.70	-15.10
BSE Healthcare	48771	-0.17	-2.33	9.19
BSE IT	28560	4.92	1.41	-17.63
BSE Metal	38377	1.44	-5.32	13.37
BSE Oil & Gas	24199	0.51	-8.07	-11.39
BSE Power	7038	0.20	-10.08	3.55
BSE Realty	6487	2.48	-11.28	-6.89

Nifty			
Top Out performers	% Change	Top Under performers	% Change
HCL Tech	8.42	KOTAK BANK	-0.99
TCS	6.79	ETERNAL	-0.79
Shriram Fin	6.31	MARUTI	-0.62
Tech Mahindra	4.93	Max Healthcare	-0.57
Infosys	4.13	NA	NA

Foreign & Domestic flows Rs. Cr (Equity)	FII Inv Oct 12	MF Inv Oct 9	DII Inv Oct 13
Buy	14757	11957	16233
Sell	12756	7535	13794
Net	2001	4421	2439
Net (YTD)	-303455	458697	677822

Policy rates	Oct 13	1W Ago	M Ago	3M Ago
Repo (%)	5.50	5.25	5.25	5.25
Reverse repo (%)	3.35	3.35	3.35	3.35
CRR (%)	3.00	3.00	3.00	3.00
Overnight rates	Oct 13	1W Ago	M Ago	3M Ago
Call (%)	5.40	5.20	5.10	5.30
10 Yr Gilt(%)^	7.36	7.20	7.02	6.73
TREP (%)	5.75	4.75	4.99	5.10
Short-term debt	Oct 13	1W Ago	M Ago	3M Ago
3-month CPs (%)	7.10	7.25	6.75	7.10
6-month CPs (%)	7.70	7.70	7.05	7.35
3-month CDs (%)	6.50	6.50	6.03	6.70
6-month CDs (%)	7.24	7.17	6.60	6.95
182-day T-bill (%)^	6.08	5.96	5.60	5.45
364-day T-bill (%)^	6.24	6.12	5.87	5.61
Long-term debt	Oct 13	1W Ago	M Ago	3M Ago
3-Y G-sec (%)	6.84	6.76	6.38	6.18
5-Y G-sec (%)	7.20	7.09	6.75	6.41
10-Y G-sec (%)	7.36	7.20	7.02	6.73

^Weighted average yield

Indian Equity

- Indian equity benchmarks closed higher on Tuesday, buoyed by gains in information technology stocks and improved investor sentiment following Finance Minister Nirmala Sitharaman's remarks on long-term capital gains tax and securities transaction tax.
- The top gainers were HCL Technologies, Tata Consultancy Services, Shriram Finance, Tech Mahindra and Infosys, up 4.13-8.42%.
- The top losers were Kotak Mahindra Bank, Eternal, Maruti Suzuki India and Max Healthcare Institute, down 0.57-0.99%.

Indian Debt

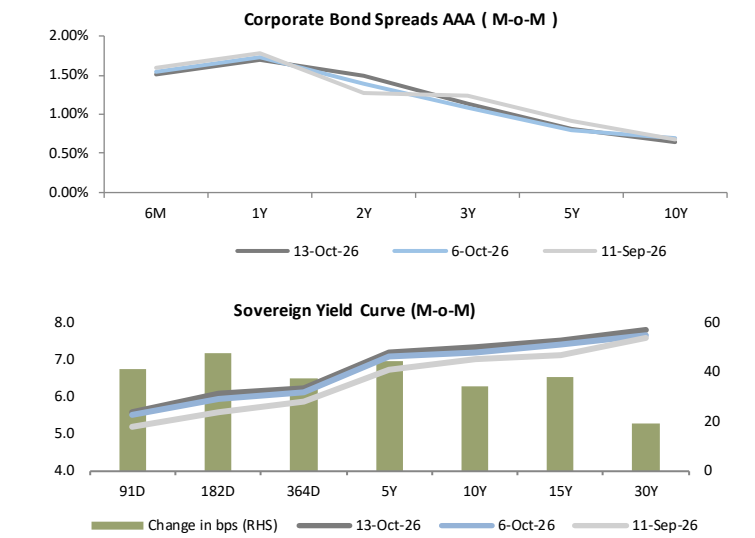
- The interbank call-money rate ended higher at 5.40% on Tuesday compared to 5.24% on Monday.
- Government bond prices ended higher on Tuesday supported by value buying though gains were capped by expectations of further rate hikes, and heavy debt supply.
- The yield of the new 10-year benchmark 06.94% GS 2036 paper ended lower at 7.37% on Tuesday compared to 7.39% on Monday.

Economy and Government

- India and Switzerland advanced their mobility partnership framework aimed at facilitating opportunities related to travel, education, and employment between the two countries.
- Prime Minister Narendra Modi said that India's growth story is inclusive and collaborative, emphasizing that the country does not grow at the expense of others.
- Finance Minister Nirmala Sitharaman said the Reserve Bank of India (RBI) may take additional measures, if required, to manage volatility in the foreign exchange market and support orderly currency movements.
- Nirmala Sitharaman said India remains well-positioned to navigate global challenges, highlighting the country's strong macroeconomic fundamentals and continued attractiveness to investors despite rupee volatility.
- Finance Minister Nirmala Sitharaman said the government would be keen to hear stakeholder views and debate around the long-term capital gains (LTCG) tax.
- The Ministry of Steel's draft National Steel Policy Vision 2047 proposes the use of AI-powered monitoring systems to detect sub-standard steel imports and strengthen trade safeguard mechanisms, supporting quality control and domestic industry protection.
- East Central Railway awarded IRCON International an Rs 862 crore EPC contract for rail infrastructure works, further strengthening the company's order book, which stood at Rs 23,366 crore.
- The Reserve Bank of India (RBI) extended its foreign exchange risk reserve requirement to banks' own rupee derivative hedging contracts, requiring lenders to maintain a 20% reserve on eligible positions, as part of measures aimed at moderating dollar demand and supporting the rupee.
- SEBI extended the relaxation allowing companies to revise the size of the fresh issue component in IPOs until March 2027, providing greater flexibility in fundraising plans amid changing market conditions.

Yields (%)	G-sec*	AAA	AA+	AA	AA-
1-Yr	6.18	7.87	8.59	8.67	9.90
3-Yr	6.84	8.10	8.82	8.90	10.13
5-Yr	7.20	8.12	8.94	9.02	10.25
10-Yr	7.36	8.13	8.95	9.03	10.26

* Weighted average yields



Global Indices	Oct 13	1D % Chg	3M % Chg	1Y % Chg
DJIA	51670	-0.35	-1.58	12.16
Nasdaq	27204	-0.15	5.15	19.87
FTSE 100	10650	-0.06	1.45	12.79
DAX	25260	-0.07	0.58	3.58
Nikkei 225	67778	-1.82	0.80	40.94
Hang Seng	24345	0.30	0.54	-5.96
KOSPI	6035	-5.46	-11.34	68.37

Global 10 yr Sov. Yields (%)	Oct 13	1D Ago	3M Ago	1Y Ago
US	5.21	5.23	4.62	4.05
UK	5.45	5.44	4.99	4.65
German	3.46	3.48	3.07	2.63
Japan	3.00	3.00	2.78	1.69

Commodity Prices	Oct 13	1D Ago	3M Ago	1Y Ago
London Brent Crude Oil (\$/bbl)	105.69	106.65	83.3	63.32
NYMEX Crude Oil (\$/bbl)	94.14	93.74	78.14	59.49
Gold (Rs / 10 gm)#	147617	148061	142188	124155

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Currencies Vs INR	Oct 13	1D Ago	M Ago	3M Ago
USD	95.25	95.75	95.72	95.83
GBP	125.92	126.92	129.45	128.30
Euro	106.43	107.30	111.15	109.30
100 Yen	60.17	60.46	62.14	59.07
Forex Reserve (\$ bn)*	734.61	747.56	785.71	674.19

* Data pertains to {{weekdays}} and Oct 2 respectively Source: CRISIL

Key Macro Indicators	
CPI	5.54% (Sep'-2026)
WPI	9.92% (Aug'-2026)
IIP	6.70% (Jul' -2026)
GDP Growth Rate	7.80% (Apr-Jun FY'26)

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Capital Market

- Sun Pharmaceutical Industries approved a plan to raise up to Rs 10,000 crore through non-convertible debentures (NCDs) to support funding requirements and business expansion.
- Vantrock plans to invest Rs 3,000 crore over the next four years to develop logistics and warehousing parks, expanding its footprint in India's warehousing and industrial infrastructure sector.
- Kalpataru Projects International Ltd (KPIL) secured new transmission and distribution (T&D) orders worth Rs 2,225 crore, strengthening its order book and power infrastructure business.

Global Equity

- Wall Street stocks ended lower on Tuesday, weighed down by weakness in semiconductor stocks, while investors assessed the start of the earnings season following major bank results.
- US 10yr yield ended lower at 5.21% as investors awaited key inflation data ahead of the upcoming Federal Reserve policy meeting.
- FTSE index closed flat on Tuesday, as weakness in mining stocks offset gains in financial shares supported by falling bond yields.
- Asian markets were trading higher at 8.30 AM.

International

- US private-sector employment, as measured by the ADP Employment Change, increased by 24.75 thousand in the week ended September 26.
- US NFIB Small Business Optimism Index declined to 97.9 in September 2026 from 98.7 in August.
- US existing home sales rose 1.5% month-over-month in September 2026 compared to a 3.2% decline in August 2026.
- China's annual inflation rate edged up to 0.9% in September 2026 compared to 0.8% in August 2026.
- China annual producer prices accelerated to 5.0% in September 2026 compared to 3.8% in August 2026.
- China's trade surplus widened to \$133.53 billion in September 2026 from \$88.72 billion a year earlier.

Upcoming market indicators

- Japan PPI, Sep (Oct 13)
- US Inflation Rate, Sep (Oct 14)
- US CPI, Sep (Oct 14)
- India Unemployment Rate, Sep (Oct 15)
- India Balance of Trade, Sep (Oct 15)
- India Imports/Exports, Sep (Oct 15)
- US Industrial Production, Sep (Oct 16)
- US Manufacturing Production, Sep (Oct 16)
- China GDP Growth Rate YoY Q3 (Oct 19)
- China Industrial Production, Sep (Oct 19)
- Eurozone Construction Output, Aug (Oct 20)
- Eurozone ZEW Economic Sentiment Index, Oct (Oct 20)
- UK Inflation Rate, Sep (Oct 21)
- India Infrastructure Output, Sep (Oct 21)
- Eurozone Consumer Confidence Flash, Oct (Oct 22)
- US S&P Global Manufacturing/Services/Composite PMI Flash, Oct (Oct 23)